



D
05/14/2024

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

Board of Education Minutes
April 23, 2024

Regular Meeting

Board of Education
5:30 p.m.

Open Session/Call to Order/Announcement of Closed Session Topics (A)

The April 23 regular meeting was called to order by the president, Pam Costa. The board meeting was held in person and was also livestreamed on the district website.

Roll Call

Present:

Pam Costa, president
Saul Hernandez, vice president
Ben Avey, clerk
Paula Villescaz, member
Tanya Kravchuk, member
Zima Creason, member

Absent:

Manuel Perez, member

Announcement of Closed Session Topics/Closed Session Visitor Comments (A-1)

There were no closed session visitor comments.

Closed Session (B)

The meeting was then recessed with the board convening in closed session to consider student expulsions in two cases (Education Code section 48918[f]); and to discuss collective bargaining matters – discussion with negotiator Daniel Thigpen, Executive Director, Labor Relations and Government Affairs, regarding CSEA Chapter 127 General/Operations support, Chauffeurs/Teamsters Local No. 150 Transportation, Supervisors, Teachers and Certificated Supervisory units, and regarding non-represented groups: management and confidential units (Government Code section 54957.6).

Reconvene Open Session/Pledge of Allegiance (C)

At 6:30 p.m., the meeting was called back to order by the president, Pam Costa. Four members of the Del Campo High School Air Force Jr. ROTC led the group in the Pledge of Allegiance.

Minutes Approved (D)

It was moved by Mr. Avey, seconded by Ms. Villescaz, that the minutes of the April 9 regular meeting be approved. MOTION CARRIED UNANIMOUSLY [AYES: Costa, Hernandez, Avey, Villescaz, Kravchuk, Creason; NOES: None; ABSENT: Perez].

Recognition: California Day of the Teacher (E-1a)

It was moved by Ms. Villescaz, seconded by Ms. Kravchuk, to adopt Resolution No. A-438 proclaiming May 8 as California Day of the Teacher. MOTION CARRIED UNANIMOUSLY [AYES: Costa, Hernandez, Avey, Villescaz, Kravchuk, Creason; NOES: None; ABSENT: Perez].

Recognition: National Nurses Week and National School Nurse Day (E-1b)

It was moved by Ms. Creason, seconded by Ms. Kravchuk, to adopt Resolution No. A-439 proclaiming the week of May 6-12 as National Nurses Week and May 8 as National School Nurse Day. MOTION CARRIED UNANIMOUSLY [AYES: Costa, Hernandez, Avey, Villescaz, Kravchuk, Creason; NOES: None; ABSENT: Perez].

High School Student Council Reports (E-2)

High School Student Council representatives Alain Rodriguez and Jason Perry from Encina Preparatory High School and Danica Piper from San Juan High School updated the board on the goals, activities and achievements at their respective schools.

Board-Appointed/District Committees (E-4)

Margaret Teichert, co-chair of the Curriculum, Standards, Instructional and Student Services (C&S) Committee, shared that the committee overwhelmingly decided to move the new high school courses board item forward to the board for consideration.

Closed Session/Expulsion Actions (E-7)

Mr. Avey reported that the board voted unanimously to accept a hearing panel's recommendation of one expulsion in case number M-26 and one suspended expulsion in case number M-30.

Visitor Comments (F)

Marsha Hesch expressed her concerns regarding the special education department.

Kirsten Fanning expressed her concerns regarding the special education department.

Consent Calendar Approved (G-1/G-8)

It was moved by Ms. Kravchuk, seconded by Mr. Hernandez, that the consent calendar items G-1 through G-8 be approved. MOTION CARRIED UNANIMOUSLY [AYES: Costa, Hernandez, Avey, Villescaz, Kravchuk, Creason; NOES: None; ABSENT: Perez].

Personnel (G-1)

Appointments, leaves of absence, separations and pre-retirement reduced workload – approved as submitted.

Purchasing Report (G-2)

Purchase orders and service agreements, change orders, construction and public works bids/contracts and zero dollar contract – approved as submitted.

Gifts (G-3)

Acceptance of gifts to Lichen K-8 School and Mesa Verde High School.

Surplus Property Report (G-4)

Approval to dispose of surplus property pursuant to Board Policy 3270 and Education Code sections 17545 and 17546.

Choices Charter School Salary Schedule Adjustment (G-5)

Approval of the request from Choices Charter School to provide an on-going salary schedule adjustment of 10% effective July 1, 2023. (Discussed: 04/09/2024)

Board Governance Handbook (G-6)

Approval of the proposed updates to the Board Governance Handbook. (Discussed: 04/09/2024)

High School Scholarship Awards (G-7)

Approval of the 2024 Bella Vista High School scholarship awards

Extension of Short-Term Nutrition Services Supervisor III Position (G-8)

Approval to extend the short-term Nutrition Services Supervisor III position in Nutrition Services until 06/07/2024.

San Juan Youth Voice Advocates (I-1)

Associate Superintendent of Educational Services, Debra Calvin, Ed.D., introduced Student Support Services Special Programs and Grants Coordinator Christina Sparks and three Youth Voice Advocates – Bella Vista High School student

Evan Bui, Del Campo High School student Karin Nicholson and Mesa Verde High School student Andrey Ratz - who gave a presentation on the work of the San Juan Youth Voice Advocates student leadership program. Ms. Nicholson gave an overview of the program, noting its partnerships and the program's reach in the 2023-2024 school year. Mr. Ratz shared information about the districtwide themes that were identified and the qualitative data collected through the listening sessions. Mr. Bui outlined recommendations for actions based on the program's findings. Ms. Nicholson shared the pre/post-survey data from session participants. The three Youth Voice Advocates shared personal impact statements regarding their experiences in the program. Ms. Sparks explained next steps for the program. Board members made comments and posed questions, which the student advocates and Ms. Sparks addressed. Superintendent Bassanelli commended SJYVA for its work, and she thanked Innovation Bridge for its partnership.

2022-2023 Audit Report (I-2)

Chief Financial Officer Joel Ryan introduced Crowe LLP Partner Jennifer Aras, who presented the 2022-2023 audit report as prepared by Crowe LLP, the district's independent auditor. Ms. Aras explained that all aspects of the financial statement audit were unmodified, or clean audit opinion, with one internal control finding related to financial reporting and two state compliance findings related to attendance reporting and independent study. Mr. Avey asked a clarifying question, which Ms. Aras addressed. Mr. Hernandez shared that the audit committee met earlier today and future plans to modify processes were discussed. It was moved by Mr. Hernandez, seconded by Ms. Kravchuk, to accept the 2022-2023 audit report as prepared by the district's independent auditor, Crowe LLP. MOTION CARRIED UNANIMOUSLY [AYES: Costa, Hernandez, Avey, Villescaz, Kravchuk, Creason; NOES: None; ABSENT: Perez].

New High School Courses (I-3)

Interim Deputy Superintendent of Schools and Student Support Amy Slavensky, Ph.D., presented the topic and then introduced Director of Professional Learning and Innovation (PLI) Nicole Kukral. Ms. Kukral explained the new course request process and reviewed the list of new proposed high school courses for 2024-2025 which includes: Science: Advanced Placement (AP) Physics C: Mechanics; Math: Advanced Placement (AP) Pre-Calculus, Data Science; Art: Art and Ethnic Studies; and English: English 3: Ethnic Studies. Board members made comments and posed questions, which Ms. Kukral addressed. Action was scheduled for May 14.

Instructional Materials Adoptions (I-4)

Dr. Slavensky presented the topic and then Ms. Kukral presented the five instructional materials recommendations for high school which includes: World Languages: IB Spanish I-II, Advanced Placement (AP) Spanish; Science: Advanced Placement (AP) Physics C: Mechanics; and History-Social Science: Psychology, Sociology. Ms. Kukral explained the small adoptions process and shared the details of the adoption selection process, including the selection criteria and stages of the process, noting the improved opportunities for feedback from staff, students and families. Ms. Kukral then shared information regarding the cost of the adoptions and professional learning opportunities for teachers and answered questions from the board. Action was scheduled for May 14.

Resolution No. 4127: Notice of Intent to Convey Easement at Katherine Johnson Middle School (I-5)

Chief Operations Officer Frank Camarda presented the item. It was moved by Ms. Creason, seconded by Ms. Villescaz, to adopt Resolution No. 4127, declaring the intent to convey a permanent easement at Katherine Johnson Middle School to the Sacramento Municipal Utility District (SMUD) and to call a public hearing to be held on May 14, 2024. MOTION CARRIED UNANIMOUSLY [AYES: Costa, Hernandez, Avey, Villescaz, Kravchuk, Creason; NOES: None; ABSENT: Perez].

Presentation of the Teamsters Union Local No. 150 Initial Proposal for Successor Contract 2024-2027 (I-6)

Executive Director of Labor Relations and Government Affairs Daniel Thigpen presented the item for discussion. There being no questions from the board, the item was scheduled for public comment on May 14.

Board Reports (J)

Ms. Creason shared that she attended the Exhibition Night at Meraki High School, which showcased next-level student projects.

Mr. Avey reported that he, along with other board members, attended the You Light the Way Ceremony, which was an amazing event.

Ms. Kravchuk reported that she attended the You Light the Way Ceremony and the school bus driver appreciation brunch, and she invited the public to participate in a community meeting with her and Assemblymember Josh Hoover on Wednesday night.

Mr. Hernandez shared that he attended the school bus driver appreciation brunch, where a tour of the new electric school buses took place.

Ms. Costa shared that she toured a new electric school bus at the school bus driver appreciation brunch, and she attended the You Light the Way Ceremony and the Kids Art Festival.

Future Agenda (K)

There were no items added to the future agenda.

Adjournment (L)

At 8:20 p.m., there being no further business, the regular meeting was adjourned.

Pam Costa, Board President

Melissa Bassanelli, Secretary

Approved: _____
:sc

DRAFT

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: E-1(a)

MEETING DATE: 05/14/2024

SUBJECT: National Speech Pathologist Day 2024

CHECK ONE:

For Discussion:

For Action:

Report:

Workshop:

Recognition:

Emergency Action:

DEPARTMENT: Special Education

ACTION REQUESTED:

The superintendent is recommending that the board adopt Resolution No. A-440 proclaiming May 18, 2024, as National Speech Pathologist Day.

RATIONALE/BACKGROUND:

In 1926, the American Academy of Speech Correction was established, and in 2010, the United States dedicated May 18th as the National Speech Pathologist Day. On this day, we celebrate around 162,000 speech pathologists across the country.

San Juan Unified School District recognizes the vital role that school speech and language pathologists play in the personal and academic development of our district's students.

ATTACHMENT(S):

A: Resolution No. A-440

BOARD COMMITTEE ACTION/COMMENT:

N/A

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FISCAL IMPACT:

Current Budget: \$ N/A

Additional Budget: \$ N/A

Funding Source: N/A

LCAP/STRATEGIC PLAN:

Goal: N/A Focus: N/A

Action: N/A

Strategic Plan: N/A

PREPARED BY:

Dominic Covello, Interim Director, Special Education

APPROVED BY:

Debra Calvin, Ed.D., Associate Superintendent, Educational Services

Amy Slavensky, Ph.D., Interim Deputy Superintendent, Schools and Student Support *ALS*
Melissa Bassanelli, Superintendent of Schools *MBS*



**SAN JUAN UNIFIED SCHOOL DISTRICT
Resolution No. A-440**

**NATIONAL SPEECH PATHOLOGIST DAY
May 18, 2024**

WHEREAS, National Speech Pathologist Day is May 18th; and

WHEREAS, this special day honoring school Speech and Language Pathologists and Speech Assistants who provide and deliver a continuum of speech and language services and supports to students to increase student learning, enabling students to improve in their speech and language skills, and improve their articulation and pragmatics; and

WHEREAS, the San Juan Unified School District appreciates and supports the speech and language team for providing sound research-based practices which are integral to instruction and learning, social and emotional development, and intervention. Speech Pathologists facilitate collaboration to help parents and educators support a student's speech and language skills both in the classroom and in their home. Pathologists are trained to assess students, utilize data-based decision-making, implement research-driven strategies during therapy, evaluate student's progress and improve student's skills.

THEREFORE, BE IT RESOLVED, that the San Juan Unified School District Board of Education joins the superintendent and staff in honoring Speech and Language Pathologists throughout the year.

Attested to this 14th day of May 2024.

Pam Costa, President

Melissa Bassanelli, Superintendent of Schools

Saul Hernandez, Vice President

Ben Avey, Clerk

Paula Villescaz, Member

Tanya Kravchuk, Member

Manuel Perez, Member

Zima Creason, Member

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

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: E-1(b)

MEETING DATE: 05/14/2024

SUBJECT: Classified School Employee Week

CHECK ONE:

For Discussion:

For Action:

Report:

Workshop:

Recognition:

Emergency Action:

DEPARTMENT: Human Resources

ACTION REQUESTED:

The superintendent is recommending that the board adopt Resolution No. A-441 proclaiming the week of May 19-25, 2024, as Classified School Employee Week.

RATIONALE/BACKGROUND:

Every year the district recognizes classified employees for their dedication and the outstanding work they perform on behalf of students, staff, and the community. Classified school employees contribute to the establishment and promotion of a positive instructional environment and play an instrumental role in providing essential services to our students. Classified school employees provide a safe and conducive learning environment for our students to ensure the district's goals for teaching and learning; because they provide vital contributions, hard work and effort throughout the year, the district proclaims the week of May 19-25, 2024, as Classified School Employee Week.

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FISCAL IMPACT:

Current Budget: \$ N/A

Additional Budget: \$ N/A

Funding Source: N/A

(Restricted Base, Supplemental, other restricted, etc.)

Current Year Only On-going

LCAP/STRATEGIC PLAN:

Goal: N/A Focus: N/A

Action: N/A

Strategic Plan: N/A

PREPARED BY:

Rebecca Toto, Ed.D., Assistant Superintendent, Human Resources



APPROVED BY:

Melissa Bassanelli, Superintendent of Schools



**SAN JUAN UNIFIED SCHOOL DISTRICT
3738 Walnut Avenue, Carmichael, CA 95608**

Resolution No. A-441

CLASSIFIED SCHOOL EMPLOYEE WEEK

May 19 – 25. 2024

WHEREAS, the week of May 19-25, 2024 has been designated as Classified School Employee Week in California by the California State Legislature; and

WHEREAS, classified school employees provide valuable services to the schools and students of the San Juan Unified School District; and

WHEREAS, classified school employees contribute to the establishment and promotion of a positive instructional environment; and

WHEREAS, classified school employees play a vital role in providing for the welfare and safety of the San Juan Unified School District; and

WHEREAS, classified school employees employed at the San Juan Unified School District strive for excellence in all areas relative to the educational community; and

NOW, THEREFORE, BE IT RESOLVED, that the San Juan Unified School District Board of Education hereby recognizes and wishes to honor the contribution of classified school employees to quality education in the State of California and in the San Juan Unified School District and declares the week of May 19-25, 2024, as Classified School Employee Week.

Attested to this
14th day of May, 2024

Pam Costa, President

Melissa Bassanelli
Superintendent of Schools

Saul Hernandez, Vice President

Ben Avey, Clerk

Paula Villescaz, Member

Tanya Kravchuk, Member

Manuel Perez, Member

Zima Creason, Member

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

APPROVED: 

HUMAN RESOURCES

The following reports are submitted for board approval

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

Agenda for the May 14, 2024 Board Meeting

1. APPOINTMENTS

MANAGEMENT

Type	Name	Status	Assignment	Location	Effective Date (s)
Rehire	Jhatu, Baljit	Prob	Director, Human Resources	District Office	06/10/24

CERTIFICATED SUPERVISORY

Type	Name	Status	Assignment	Location	Effective Date (s)
New Hire	Campisi, Amanda	Prob	Psychologist	Special Education-Kenneth	08/06/24
New Hire	Chima, Gurminder	Prob	Psychologist	Special Education-Kenneth	08/06/24
New Hire	Javier, Isabel	Prob	Psychologist	Special Education-Kenneth	08/06/24
New Hire	McDaniel, Isabelle	Prob	ECE Administrator	Marvin Marshall	07/01/24
New Hire	Mickelson, Jennifer	Prob	Principal, Elementary	Trajan	07/25/24
New Hire	Morgan, Larissa	Prob	Psychologist	Special Education-Kenneth	08/06/24
Promotion	King, Stephanie	Prob	Principal, Elementary	Whitney Ave	07/25/24
Promotion	Stellmacher, Roxanne	Prob	Principal, Elementary	Lichen	07/25/24
Rehire	Hall, Kelly	Prob	Psychologist	Special Education- Kenneth	08/06/24

SUPERVISORY

Type	Name	Status	Assignment	Location	Effective Date (s)
New Hire	Manalo, Raymond	Prob	Supv-Trans Oper II VM	Transportation	04/24/24

CERTIFICATED

Type	Name	Status	Assignment	Location	Effective Date (s)
New Hire	Chan, Jenna	Prob	Nurse School	Health Services	04/22/24
Rehire	Walker, Barbara	Prob	Teacher Elementary K-8	Dyer-Kelly	08/08/24

CLASSIFIED

Type	Name	Status	Assignment	Location	Effective Date (s)
New Hire	Bennett, Susan	Prob	Van Driver	Transportation	04/22/24
New Hire	Berghorst, Joshua	Prob	Campus Safety Monitor	Mira Loma	04/22/24
New Hire	Bigzad, Abdul Wares	Prob	Inst Asst/Bil-Farsi	Encina	04/15/24
New Hire	Broussard, Ronye	Prob	Instructional Assistant III	Carmichael	04/19/24
New Hire	Chavez, Gina	Prob	School Playground Rec Aide	Cowan	04/11/24
New Hire	Cowan, Kerri	Prob	Van Driver	Transportation	04/22/24
New Hire	Imamyar, Wahida	Prob	Nutrition Services Worker I	Encina	04/23/24
New Hire	Khalil, Intisar	Prob	Instructional Assistant I	Sierra Oaks	04/29/24
New Hire	Lomeli, Maria	Prob	Instructional Assistant I	Greer	04/23/24
New Hire	Meckler, Steven	Prob	Low Voltage Technician	M&O - Electronics - Hemlock	04/29/24
New Hire	Robinson, Miranda	Prob	Instructional Assistant II	Dyer-Kelly	04/22/24
New Hire	Ronald, Alexander	Prob	Groundskeeper/Gardener	M&O - Building Maintenance	04/29/24
New Hire	Sediqi, Sameera	Prob	Non-Instruct Support Aide	Encina	04/22/24
New Hire	Stiles, Anna	Prob	Adm & Fam Services Tech	Central Enroll/Family Svcs	04/29/24
New Hire	Wilde, Dean	Prob	Instructional Assistant I	Greer	04/15/24
New Hire	Wygal, Jayson	Prob	Groundskeeper/Gardener	M&O - Building Maintenance	04/15/24
Rehire	Schafer, Ashley	Prob	M&O Work Order Technician	M&O - Building Maintenance	04/20/24
Rehire	Shubbar, Yasir	Prob	Instructional Assistant III	Ralph Richardson	04/11/24

2. LEAVES OF ABSENCE

CERTIFICATED

Type	Name	Status	Assignment	Location	Effective Date (s)
Paid	Armenta-Serrao, Charley	Perm	Teacher Grade 2	Starr King	04/01/24 06/30/24
Paid	Boyden, Zachary	Prob	Tch-Montessori 4-5 Combo	Cottage	04/08/24 06/30/24
Paid	Carlson, Justine	Prob	Tch-CDPT	Early Childhood Education	04/01/24 06/30/24
Paid	Cerecedes, Michael	Perm	Teacher Combo 4-5	Woodside	04/08/24 06/30/24
Paid	Rodriguez, Samantha	Perm	Tch-Elem Specialist-PE	Teaching & Learning	04/08/24 06/30/24
Paid	Stommel, Phillip	Perm	Tch-English Language Dev	Mira Loma	04/01/24 03/31/25

CLASSIFIED

Type	Name	Status	Assignment	Location	Effective Date (s)
Paid	Bradford, Linda	Perm	Nutrition Services Worker II	Cameron Ranch	03/21/24 05/26/24
Paid	Etebarzai, Susan	Perm	Instructional Assistant I	Arlington Heights	04/01/24 06/04/24

Agenda for the May 14, 2024 Board Meeting

2. LEAVES OF ABSENCE (Continued)

CLASSIFIED

Type	Name	Status	Assignment	Location	Effective Date (s)
Paid	Gray, Ashley	Perm	Instructional Assistant III	Carriage	03/25/24 06/30/24
Paid	Guevin, Hayley	Perm	Intermed Clerk Typist	Churchill	04/01/24 06/30/24
Paid	Moore, Seth	Perm	Elementary Head Custodian	Pershing	04/11/24 04/30/24
Paid	Paddeck-Cotton, Carrie	Perm	Inst Asst Health	Health Services	04/05/24 06/30/24
Paid	Rogers, Michelle	Perm	Instructional Assistant I	Carriage	04/09/24 05/08/24
Paid	Shotwell, Judith	Perm	Supv Expnd Lrnng Programs	Pupil Personnel Services	04/01/24 04/30/24
Paid	Solomon, Adrienne	Perm	Nutrition Services Worker II	Ottoman	03/15/24 05/19/24
Paid	Williams, Brenda	Perm	Instructional Assistant III	Laurel Ruff	02/01/24 04/30/24
Unpaid	Ostapyuk, Dan	Prob	Intermed Clerk Typist	Pupil Personnel Services	02/29/24 05/01/24

3. SEPARATIONS

CLASSIFIED

Type	Name	Status	Assignment	Location	Effective Date (s)
Resignation	Byrd, Aidan	Prob	Instructional Assistant I	Cottage	04/16/24
Resignation	Clark, Sarah	Perm	High School Secretary I	San Juan	04/19/24
Resignation	Lazrig, Noor Elhuda	Perm	Instructional Assistant I	Schweitzer	04/12/24
Resignation	Ledezma, Luis	Prob	Campus Safety Monitor	El Camino	04/12/24
Resignation	Moyer, Ryan	Perm	Middle Sch Head Custodian	Katherine Johnson	04/26/24
Retirement	Pond, Thomas	Perm	Custodian	Thomas Edison	04/26/24
Dismissal	CL-595	Perm	Instructional Assistant I	Teaching & Learning	03/11/24
Suspension	CL-596	Perm	Nutrition Services Worker II	Nutrition Services	05/15/24
Suspension	CL-597	Perm	Bus Driver	Transportation	05/15/24
Suspension	CL-598	Perm	Tech Support Specialist	Technology Services	05/15/24
Suspension	CL-599	Perm	Plumber	Maintenance & Operations	05/15/24

4. PRE-RETIREMENT REDUCED WORKLOAD

CERTIFICATED

Type	Name	Status	Assignment	Location	Effective Date (s)
Pre-Retirement	Winter, Mar-Jo	Perm	Tch-Grade 7/8	Carnegie	08/13/24

5. REASSIGNMENTS / CHANGE IN WORK CALENDAR

CERTIFICATED SUPERVISORY

Type	Name	Status	Assignment	Location	Effective Date (s)
Reassignment	Butler, Cassidy	Perm	Principal, Elementary	Coyle Ave	07/25/24
Reassignment	Harrison, Gelika	Perm	Principal, Elementary	Schweitzer	07/25/24
Reassignment	Marshall, Diana	Perm	Principal, Elementary	Earl LeGette	07/25/24
Reassignment	Reinhard, James	Perm	Principal, Elementary	Starr King	07/25/24

6. JOB DESCRIPTION / SALARY RANGE CHANGE

MANAGEMENT

Class Title	Unit	New/Update	Old Salary Range	New Salary Range	Effective Date (s)
Board Certified Behavior Analyst (BCBA)	SJAA	Update	N/A	N/A	05/15/24



JOB DESCRIPTION

Position Code: BCBA
Bargaining Group: SJAA
Salary Range: 15
Work Calendar: 3 34
Page 1 of 3

POSITION TITLE: Board Certified Behavior Analyst (BCBA)

DEFINITION: Under general direction, this individual will provide consultation, support and advisory services to teachers, administrators, parents and staff, primarily in support of general education students. The BCBA will assist in administration and coordination of positive behavior support for all students and actively participate in the development and implementation of programs and practices relative to the management of students who have difficulties engaging in socially appropriate behavior patterns. The BCBA will conduct functional behavior assessments (FBA) and plan, organize, coordinate and provide consultative and direct behavior intervention services.

DIRECTLY RESPONSIBLE TO: Director, Multi-Tiered System of Supports

SUPERVISION OVER: Classified staff as assigned.

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

- Assists in coordination of all behavioral education supports and services.
- Develop/implement referral processes for behavioral support across the district.
- Conduct functional behavioral assessments (FBA) and plan, organize, coordinate and provide consultative and direct behavior intervention services.
- Plans and implements and/or supervises employees who implement behavioral intervention plans in collaboration with school teams.
- Provides intervention strategies and classroom management techniques for classrooms and individual students with high-risk behaviors.
- Provide consultation, support and advisory services to teachers, administrators, parents and staff.
- Supervise the implementation of Behavior Support Plans
- Review and evaluate the effectiveness of Behavior Support Plans
- Work with staff in developing data collection systems, monitoring data collection, and analyzing data to ensure the effectiveness of interventions and instructional strategies.
- Develop and/or conduct behavior training for staff and parents in areas of expertise.
- Consult with district and school staff and parents/guardians on matters related to behavior.
- Develop and/or monitor district procedures to assure compliance with governmental regulations, codes, restrictions and reporting requirements concerning behavioral interventions and emergencies.
- Supervise BCBA candidates within the district: supervision, assessment, training and oversight.
- Performs other duties as assigned that support the overall objective of the position.

QUALIFICATIONS:

Education and Experience:

Any combination of training, experience and/or education equivalent to graduation from an accredited college or university with a master's degree in a related field such as psychology or behavior analysis and experience providing behavior support in schools.

Licenses and Certifications:

- Certification as a Board-Certified Behavior Analyst (BCBA) is required.
- Valid Class C driver's license issued by the California Department of Motor Vehicles within 30 days of hire or before driving any vehicle requiring this license.

Knowledge, Skills, and Abilities:

- Knowledge and skills in the area of behavior analysis and evidence-based interventions
- Knowledge of applicable federal, state, and local laws, regulations, codes and educational programs or resources
- Knowledge of applicable district policies, procedures, and programs
- Knowledge of interpersonal skills using tact, patience, and courtesy
- Knowledge and skill in use of computers and assorted software programs
- Skills in public speaking, designing presentations and training for school professionals.
- Skills in communicating assessment results both orally and in writing.
- Ability to work with students who exhibit inappropriate behaviors and provide support and professional learning for staff who work with such students.
- Ability to provide direction to others.
- Ability to solve complex problems where trade-offs and risk are involved, confrontations exist and status of staff and students can be impacted
- Ability to understand and follow verbal and written instruction.
- Ability to communicate effectively both verbally and in writing with administrators, staff, students, and the community.
- Ability to work independently, with minimum direction, and make decisions within the framework of established guidelines.
- Ability to work effectively with all levels of district staff, parents, students, and the community.
- Ability to analyze and resolve problems with tact and diplomacy.
- Ability to establish priorities and meet deadlines.
- Ability to maintain consistent, punctual and regular attendance.

WORKING CONDITIONS:

Work Environment:

- Indoor office environment
- Position includes visitations to school sites and various classroom environments.
- Moderate noise
- Continuous contact with staff, students, parents and the community

Typical Physical Characteristics: (with or without the use of aids; consideration will be given to reasonable accommodation)

- Communicate to exchange information both in person, in small groups, and/or on the telephone.
- Inspect documents and other written materials with fine print.

- Move about schools and facilities to conduct work, including sitting or remaining in a stationary position for extended periods of time.
- Operate office equipment requiring repetitive hand movement and fine coordination.
- Physical, mental and emotional stamina to endure long hours under sometimes stressful condition.

Other Characteristics:

- Ability to work additional hours and weekends on occasion.
- Ability to travel for work related purposes.

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

Board Approved: March 19, 2024

Revised: May 15, 2024 (Work Calendar)

DRAFT

APPROVED:  
Joel Ryan CFO

Purchasing Contracts Report

The following reports are submitted for board approval/ratification:

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

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

April 10, 2024 - April 30, 2024

PO#	Date	Vendor Name	Description	Amount \$	Site/ Department
TBD	4/17/2024	Fulcrum ThoughtExchange	Subscription fees for Engagement+. Exchanges, survey, data and analytics services. Effective dates 04/01/2024 - 03/31/2025	\$ 29,172.15	Communications and LCAP
TBD	4/29/2024	The Education Team	Substitute staffing services for After-School Programs, 2024-25 school year	\$ 300,000.00	Student Support Services
TBD	4/30/2024	The Regents of the University of California	Facilitation of Workshops, Presentations for College Knowledge and Leadership Academy. Effective dates: 01/01/24 - 08/30/24	\$ 45,000.00	Equity & Student Achievement
TBD	4/30/2024	Bright Morning Consulting	Professional training and coaching for staff Membership effective dates: 07/2024 - 06/2025	\$ 35,775.00	Equity & Student Achievement
PO24-06290	4/22/2024	Houghton Mifflin	Middle School math textbooks	\$ 141,449.32	Prof Learning and Innovation
PO24-006289	4/22/2024	Gateway	Experience Chemistry textbooks	\$ 325,426.98	Prof Learning and Innovation
VR24-09545	4/23/2024	SCOE	Science Amplify Workbooks	\$ 124,679.63	Prof Learning and Innovation
VR24-09842	4/30/2024	Frasco	Flight Simulator	\$ 193,269.50	CTE - Mira Loma

Purchasing Contracts Board Report
Change Orders/Amendments

April 10, 2024 - April 30, 2024

Change Orders

PO#	Date	Vendor Name	Description	Original PO Amount \$	Previous Approved C/O Totals \$	Current C/O for Approval Amount \$	New Contract Amount \$	Responsibility
BPO24-00416	4/18/2024	Perrin Bernard, DBA Individual FoodService	Additional purchases	\$ 150,000.00	\$ 365,000.00	\$ 35,000.00	\$ 550,000.00	Nutrition Services

Service Agreement Change Orders

PO#	Date	Vendor Name	Description	Original PO Amount \$	Previous Approved C/O Totals \$	Current C/O for Approval Amount \$	New Contract Amount \$	Responsibility
PO24-02565	4/18/2024	School Steps Inc.	Additional services, BCBA, Psych Support	\$ 93,500.00		\$ 274,700.00	\$ 368,200.00	Special Education
PO24-01668	4/18/2024	Point Quest Depot Park	Additional language and speech therapy services	\$ 250,000.00		\$ 164,000.00	\$ 414,000.00	Special Education
PO24-02018	4/18/2024	Aldar Academy	Additional counseling, language and speech therapy services	\$ 27,000.00		\$ 75,130.00	\$ 102,130.00	Special Education

Other Contract Change Orders

PO#	Date	Vendor Name	Description	Original PO Amount \$	Previous Approved C/O Totals \$	Current C/O for Approval Amount \$	New Contract Amount \$	Responsibility
VR24-01627	4/19/2024	RMA Group	Material Testing and inspection on Arcade New Construction 001-9512-P1 project	\$ 52,763.50	\$ 232,462.50	\$ 59,130.00	\$ 344,356.00	216 - Facilities
VR24-07941	4/23/2024	Campbell Keller	Graphics added to Arcade New Construction 001-9512-P1 project	\$ 1,893,632.33		\$ 135,886.07	\$ 2,029,518.40	216 - Facilities
VR24-03105	4/23/2024	ATC Group Services LLC DBA Atlas Technical	Additional soil testing at Arcade new Construction 001-9512-P1 project	\$ 99,338.00	\$ 77,130.00	\$ 6,200.00	\$ 182,668.00	216 - Facilities

Lease Amendments/Change Orders

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

General Contract Change Orders

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

Purchasing Contracts Board Report
Construction and Public Works Bids and Contracts

April 10, 2024 - April 30, 2024

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

General Contract

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

Other Contracts

Fund	Date	PO#	Bid #	Vendor Name	Description	Amount \$	Responsibility
26	4/18/2024	TBD	CMAS	Landscape Structure, Inc.	Playground structures Oakview Student Safety (Fencing) 137-9716-P1	\$ 234,677.59	216 - Facilities
26	4/18/2024	TBD	CMAS	Landscape Structure, Inc.	Playground structures Northridge Student Safety (Fencing) 135-9716-P1	\$ 205,285.28	216 - Facilities

New Addendum to Master Agreements

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

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

**AGENDA ITEM: G-3
MEETING DATE: 05/14/2024**

APPROVED:

 
Joel Ryan CFO

Business and Financial Report

The following reports are submitted for board approval/ratification:

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

SAN JUAN UNIFIED SCHOOL DISTRICT
Accounting Services

WARRANTS & PAYROLL

VENDOR AND CONTRACT WARRANTS		
Fund		March 2024
01	General Fund	\$ 23,968,162.89
09	Charter Schools	\$ 18,511.62
10	Special Ed Pass-Thru	\$ -
11	Adult Education	\$ 624,817.99
12	Child Development	\$ 107,737.21
13	Food Service/Cafeteria	\$ 1,380,404.77
14	Deferred Maintenance	\$ 85,338.38
21	Building Fund	\$ 14,137.28
22	Measure S Building Fund	\$ -
23	Measure J Building Fund	\$ 407,506.40
24	Measure N Building Fund	\$ -
25	Capital Facilities	\$ 15,774.00
26	Measure P Building Fund	\$ 10,639,955.09
35	State Schools Facilities Fund	\$ -
40	Sp Res FD -- Capital Outlay Proj	\$ -
67	Self Insurance	\$ 1,190,297.50
95	Student Body	\$ -
TOTAL		\$ 38,452,643.13

PAYROLL AND BENEFITS		
All Funds		March 2024
Certificated Payroll		\$ 24,082,703.18
Classified Payroll		9,905,945.85
Benefits		16,550,016.65
TOTALS		\$ 50,538,665.68

GRAND TOTAL \$ 88,991,308.81

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: G-5

MEETING DATE: 05/14/2024

SUBJECT: Surplus Property

CHECK ONE:

- For Discussion:
For Action:
Report:
Workshop:
Recognition:
Emergency Action:

DEPARTMENT: Business Support Services

ACTION REQUESTED:

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

RATIONALE/BACKGROUND:

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

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

ATTACHMENT(S):

A: List of Surplus Property

BOARD COMMITTEE ACTION/COMMENT:

N/A

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FISCAL IMPACT:

Current Budget: \$ _____ N/A

Additional Budget: \$ _____ N/A

Funding Source: _____ N/A

(unrestricted base, supplemental, other restricted, etc.)

Current Year Only Ongoing

LCAP/STRATEGIC PLAN:

Goal: N/A Focus: N/A

Action: N/A

Strategic Plan: N/A

PREPARED BY: Joel Ryan, Chief Financial Officer



APPROVED BY: Melissa Bassanelli, Superintendent of Schools



**Board of Education Agenda Item
Surplus Property**

Attachment A

5/14/2024

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

Location/Site	Make	Model	Description	Fixed Asset / Serial #	Disposition
Carmichael	HP	LaserJet M553	Printer	6N0Y432901	eWaste
Carmichael	HP	LaserPro M47d3n	Printer	JP8CK1C1DT	eWaste
Encina	Apple	Macbook	Computer	1000011475	eWaste
Del Campo	Copystar		Copier		eWaste
Del Paso	Apple	iMac	Computer	1000013028/QP038043DAS	eWaste
Del Paso	Apple	iMac	Computer	1100014092	eWaste
Del Paso	Apple	iMac	Computer	1000013025/QP03713SDAS	eWaste
Del Paso	Apple	iMac	Computer	1100014082	eWaste
Kenneth Ave	Kyocera	TASKalfa 550i	Printer	NWN2300847	eWaste
San Juan	Xplorer GLX	PS-2002	1 box-Calculators		Recycled
San Juan			1 box-Keyboards		Recycled
San Juan	HP	OfficeJet Pro 8710	Printer	20177368/CN63KBM2B5	eWaste
San Juan	HP	OfficeJet Pro 8711	Printer	20177370/CN668EW1DD	eWaste
San Juan	HP	LaserJet M2727nf	Printer	CNBJ191990	eWaste
San Juan	HP	C3952A	Copier	USKC289624	eWaste
San Juan	HP	Laserjet CP3525n	Printer	20179795/CNCCB2L09K	eWaste
San Juan	HP	Compaq dc7600	Printer	0600002582/2UA6440KBI	eWaste
San Juan	HP	LA2205wg	Monitor	2MEO2O3270	eWaste
San Juan	HP	Laserjet Pro M227fdw	Printer	VND3C30102	eWaste
San Juan	HP	Laserjet Pro P3015	Printer	VNBCBDQ06D	eWaste
San Juan	HP	Laserjet CP3505n	Printer	CNBC7H0BN	eWaste
San Juan	Aver	F50	Document Camera	20176737/5058212120P	Recycled
San Juan	Canon	F167802	Copier	UWM30673	eWaste
San Juan	Benq	MW526AE	Projector	PD67h0016504E	Recycled
San Juan	NEC	VT 595	Projector	7Z03521EJ	Recycled
San Juan	NEC	NP-V260x	Projector	2601578EE	Recycled
San Juan	NEC	NP400	Projector	8900254FB	Recycled
San Juan	Hitachi	CP-S310	Projector	G1F001062	Recycled
San Juan	Apple	TV	Streaming Device	F02JM2EZDRHN/7CD1C3093A8B	Recycled
San Juan	3m	1800AJC	Projector	18067475	Recycled
San Juan	Domo	RCK-T07	Tablet	902AG071204034	eWaste
San Juan	Cyberpower	APC 1350AVR	Battery Backup		Recycled
San Juan	JVC	DR-MV150B	DVD Player	115R0206	Recycled
San Juan	JVC	DR-MV150B	DVD Player	125R9583	Recycled
San Juan	JVC	DR-MV150B	DVD Player	125R2230	Recycled
San Juan	JVC	HR-XVC26U	DVD Player	119X4358	Recycled
San Juan	HitachiSoft	StarBoard BT-2Gm	Tablet	BT-2Gm910Th080600501	eWaste
San Juan	Promethean	Activslate	Tablet	S1007210153	eWaste
San Juan	Optoma	DLP TX765W	Projector	Q8BY942AAAAAC0011	Recycled

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

SUBJECT: New High School Courses for 2024-2025

DEPARTMENT: Division of Teaching and Learning

AGENDA ITEM: G-6

MEETING DATE: 05/14/2024

CHECK ONE:

- | | |
|-------------------|-------------------------------------|
| For Discussion: | <input type="checkbox"/> |
| For Action: | <input checked="" type="checkbox"/> |
| Report: | <input type="checkbox"/> |
| Workshop: | <input type="checkbox"/> |
| Recognition: | <input type="checkbox"/> |
| Emergency Action: | <input type="checkbox"/> |

ACTION REQUESTED:

The superintendent is recommending that the board approve the new proposed high school courses.

RATIONALE/BACKGROUND:

The proposed high school courses of study listed below are designed to ensure student choice and instructional alignment with the Strategic Plan, Local Control and Accountability Plan (LCAP), and California's State Standards. The proposed courses of study provide a high level of rigor, deeper opportunities for study, and promote college and career readiness.

Courses

- Science: Advanced Placement (AP) Physics C: Mechanics
- Math: Advanced Placement (AP) Pre-Calculus, Data Science
- Art: Art and Ethnic Studies
- English: English 3: Ethnic Studies

ATTACHMENT(S):

A: New High School Courses Rational/Background

BOARD COMMITTEE ACTION/COMMENT:

Curriculum, Standards, Instructional & Student Services Committee: 03/20/2024 (discussion & action)

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 04/15/2024, 05/06/2024

Board of Education: 04/23/2024

FISCAL IMPACT:

Current Budget: \$ N/A

Additional Budget: \$ N/A

Funding Source: N/A

LCAP/STRATEGIC PLAN:

Goal: 1

Focus: N/A

Action: All

Strategic Plan: 1

Current Year Only:

On-going:

NK

PREPARED BY: Nicole Kukral, Director, Professional Learning and Curriculum Innovation

APPROVED BY: Amy Slavensky Ph.D., Interim Deputy Superintendent, Schools and Student Support *ALS*
Melissa Bassanelli, Superintendent of Schools *MBS*

**San Juan Unified School District
New High School Courses for 2024-2025
Rationale/Background**

Advanced Placement (AP) Physics C - Mechanics (A-G):

AP Physics C: Mechanics is equivalent to a one-semester, calculus-based, college-level physics course, especially appropriate for students planning to specialize or major in physical science or engineering. The course explores topics such as kinematics; Newton's laws of motion; work, energy, and power; systems of particles and linear momentum; circular motion and rotation; and oscillations and gravitation. Introductory differential and integral calculus is used throughout the course. ("d") (District)

Advanced Placement (AP) Pre-Calculus (A-G):

In AP Precalculus, students explore everyday situations using mathematical tools and lenses. Through regular practice, students build deep mastery of modeling and functions, and they examine scenarios through multiple representations. They will learn how to observe, explore, and build mathematical meaning from dynamic systems, an important practice for thriving in an ever changing world. AP Precalculus prepares students for other higher-level mathematics and science courses. The framework delineates content and skills common to college precalculus courses that are foundational for careers in mathematics, physics, biology, health science, social science, and data science. ("c") (District)

Art and Ethnic Studies (A-G):

In this Art & Ethnic Studies course, students will develop and cultivate respect, empathy, and solidarity with historically marginalized groups of people reflected in our local demographics (Native Americans, African Americans, Latino/a/x Americans, and Asian & Pacific Islander Americans, among others) through developing Visual Arts including (but not limited to) drawing, painting, collage, murals, photography, public art, and mixed media. This survey course would provide a foundation that future classes could build upon for a more in-depth exploration of art forms in varying cultures and communities.

("f") ("non a-g") (Del Campo)

Data Science (A-G):

In this course, students will learn to understand, ask questions, and represent data through project-based units. The units will give students opportunities to be data explorers through active engagement, developing their understanding of data analysis, sampling, correlation/causation, bias, and uncertainty, modeling with data, making and evaluating data-based arguments, and the importance of data in society. At the end of the course, students will have a portfolio of their data science work to showcase their newly developed knowledge and understanding. The curriculum will be adaptable so that teachers can either use the data sets provided or bring in data sets most relevant to their own students. We will apply for A-G approval of the course, which would mean the course can be taken as an alternative to Algebra 2, or in addition to Algebra 2. ("c") (Del Campo)

English 3: Ethnic Studies (A-G):

Students in the English 3 Ethnic Studies course read and analyze a broad range of nonfiction and fiction selections, deepening their awareness of how language works in effectively communicating an idea. Additionally, this course aims to educate students to be civically, socially, and economically conscious through the themes of identity, history and movement, systems of power, and social movements and equity. By studying the historic struggle of communities of color, taking into account the intersectionality of identity, students will develop respect and empathy for individuals and groups of people locally, nationally, and globally to build self-awareness, empathy, and foster active social engagement. ("b") ("non a-g") (Mira Loma)

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

SUBJECT: Instructional Materials Adoption

AGENDA ITEM: G-7

DEPARTMENT: Division of Teaching and Learning

MEETING DATE: 05/14/2024

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

ACTION REQUESTED:

The superintendent is recommending that the board approve the Report IIs related to new instructional materials adoptions.

RATIONALE/BACKGROUND:

As San Juan Unified School District continues to implement the state standards and new graduation requirements, teachers and students must have access to current and aligned instructional materials. To address this need, the Professional Learning and Curriculum Innovation department recruited teachers and community members to review and recommend new standards-aligned textbooks and materials for adoption.

ATTACHMENT(S):

A. Textbook Adoptions Report IIs

- World Languages: IB Spanish I-II, Advanced Placement (AP) Spanish
- Science: Advanced Placement (AP) Physics C: Mechanics
- History-Social Science: Psychology, Sociology

BOARD COMMITTEE ACTION/COMMENT:

Curriculum, Standards, Instructional & Student Services Committee: 03/20/2024 (discussion & action)

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 04/15/2024, 05/06/2024

Board of Education: 04/23/2024

FISCAL IMPACT:

Current Budget: \$234,889.39

Additional Budget: \$ N/A

Funding Source: Prop 20 Lottery Funds & K-12

Instructional Materials Reserve (locally restricted)

Instructional Technology Funds

LCAP/STRATEGIC PLAN

Goal: 1

Focus: 5 & 6

Action: All

Strategic Plan: 1

Current Year Only On-going

NK

PREPARED BY: Nicole Kukral, Director of Professional Learning and Curriculum Innovation

APPROVED BY: Amy L. Slavensky, Ph.D., Interim Deputy Superintendent, Schools and Student Support *ALS*
Melissa Bassanelli, Superintendent of Schools *MBS*

**San Juan Unified School District
Curriculum and Professional Development Department**

Textbook Adoption

Report II

SUMMARY INFORMATION

1. Subject area or course:

International Baccalaureate (IB) Spanish I and II

2. Recommended text(s):

Temas Para Español B, Vista Higher Learning, 2020

3. Rationale:

a. Title, publisher, copyright and year of adoption of current textbook:

Temas, Vista Higher Learning, 2014, adopted in 2017

b. Alignment with state or district textbook cycle:

The adoption of the Spanish IB I and II materials is on cycle with the current SJUSD adoption matrix

c. Special considerations, if any:

None.

4. Adoption timeline:

Action	Date
Publisher presentations	September 27, 2023
Public review period	October 11, 2023 - January 8, 2024
Committee makes a recommendation	January 23, 2024
Report II to Curriculum & Standards	March 20, 2024
Board discussion and action	April 23 and May 14, 2024
Materials delivered to sites	

5. Actual total cost over the life of the adoption for materials:

The total cost of the adoption is \$14,472.23.

Textbook Adoption – Report II – Page 2
International Baccalaureate (IB) Spanish I and II

6. Source of funding:

The K-12 Instructional Materials Reserve (locally restricted) is the source of funding.

RECOMMENDATION PROCESS

7. List of adoption committee members:

See *Attachment A: List of Committee Members*

8. What criteria did piloting teachers use to evaluate materials?

The adoption committee evaluated the materials using the Category Key Indicators document.

See *Attachment B: Category Key Indicators*

9. What opportunities were provided for community input?

Community members were able to join the adoption committee. An application for committee participation was shared via the *San Juan Scene* newsletter and social media.

Opportunities to provide feedback on the materials were shared through district and school newsletters, the district website, the FACE webpage, multiple social media posts, through district-initiated phone and email messages to all families, as well as in *Behind the Scenes* and *San Juan Scene*. Flyers to share with families and community members explaining how they can review materials were posted at each high school's front office, in Central Enrollment, in the FACE Mobile, and at the fingerprinting station in the Human Resources Department at the District Office. In addition, a representative from PLI attended several events that families attend in order to advertise the materials adoptions. Dates for materials review and attendance at family events were as follows:

What	When	Where
Public review period	October 11, 2023 - January 8, 2024	Professional Learning & Innovation office and online
College Night	September 21, 2023	Rio Americano High School

Textbook Adoption – Report II – Page 3
International Baccalaureate (IB) Spanish I and II

SPAC Meeting	October 5, 2023	SJUSD District Office Board Room
FACE Fall Conference	October 7, 2023	Arden Middle School
Family Leadership Academy	October 23, 2023	On Zoom
DELAC meeting	November 16, 2023	SJUSD District Office Board Room

FEEDBACK RESULTS

10. Considering the needs of district students, what are the strengths and limitations of the recommended materials?

Strengths
<ul style="list-style-type: none"> ● The materials provide challenging opportunities for growth in linguistic skills, communicative proficiency, literacy, and interculturality. ● It includes innovative tools for language proficiency skills building. ● The textbook encompasses complex, multi-faceted content and varied approaches to learning. ● Students are able to gain an appreciation for the diverse communities of the Spanish-speaking world.
Limitations
<ul style="list-style-type: none"> ● The assessment program would be even better with more activity options for make-up tests or retakes ● The program would benefit from increased suggestions for differentiation to meet the needs of diverse learners.

11. What were the results of the evaluation and what are the recommended materials?

The teacher evaluated the materials based on the Key Indicators and recommends *Temas Para Español B*.

**Textbook Adoption – Report II – Page 4
International Baccalaureate (IB) Spanish I and II**

12. List all the student and teacher components of the program, both purchased and gratis.

Student Components	Teacher Components
<ul style="list-style-type: none">● Student edition● 7-year digital access for the student platform	<ul style="list-style-type: none">● Teacher edition● 7-year digital access for the teacher platform

13. What professional learning will be offered to teachers? What costs will be associated with the training?

A professional learning session online is included in the cost of the adoption. This session will be scheduled in the fall. Teachers will also have the opportunity to work individually with the publisher for support.

14. Curriculum Department contact for additional information:

Nicole Kukral, Director, Professional Learning and Curriculum Innovation
nkukral@sanjuan.edu
(916) 979-8934

15. Date submitted Report II: March 20, 2024

Textbook Adoption – Report II – Page 5
International Baccalaureate (IB) Spanish I and II

Attachment A: Adoption Committee Members

Name	School/Role
Margarita Sanders	Mira Loma High School/Teacher

Textbook Adoption – Report II – Page 6
International Baccalaureate (IB) Spanish I and II

Attachment B: Category Key Indicators for IB Spanish I and II

Category	Key Indicators
Content/ Alignment to Standards	<ul style="list-style-type: none"> • Reflects and incorporates the content, big ideas and instructional approaches from the <u>2019 California World Languages Standards</u> and the <u>2020 California World Languages Framework</u> • Provides explicit, sequential, logical, systematic instruction and diagnostic support • Reflects accurate, current, and relevant content information
Program Organization	<ul style="list-style-type: none"> • Includes enough material to support the entirety of the course • Presents information and instruction systematically and logically for standards, tasks, and assessments • Includes guidance for using all components of the program to support deep and meaningful student learning (including use of the target language and authentic materials) • Includes helpful reference materials for teachers to use the program (clear table of contents, glossaries, unit/lesson overviews, etc.)
Assessment	<ul style="list-style-type: none"> • Assesses understanding and application of skills and knowledge embedded in the program • Provides opportunity for students to have experience in and practice with performance assessments in all three modes of communication • Assesses students in several formats for immediate follow-up instruction, practice, and review • Helps teachers plan and determine the effectiveness of classroom instruction
Universal Access	<ul style="list-style-type: none"> • Provides resources and strategies that engage every student in the classroom • Provides comprehensive support (scaffolding, modification) for teachers to provide effective instruction for special needs students and English learners • Includes user friendly style/format (visual stimuli, graphics) that enhances learning • Provides a variety of activities to facilitate retention and promote incorporation of objectives
Instructional Planning and Teacher Support	<ul style="list-style-type: none"> • Identifies specific objectives, instructional examples and practice opportunities in every lesson • Provides a list of necessary instructional materials for each lesson

Textbook Adoption – Report II – Page 7
International Baccalaureate (IB) Spanish I and II

	<ul style="list-style-type: none"> ● Provides support/suggestions for the appropriate use of the program's technology ● Includes electronic resources that are integral to the program, not extraneous ● Provides homework suggestions that reinforce or extend classroom instruction
Digital Tools/ Online Resources	<ul style="list-style-type: none"> ● Includes clear and sufficient guidance to support teaching and learning of the targeted standards, including, when appropriate, the use of technology and media. ● Technology components are easy to access and user friendly for students and teachers ● Technology is available across multiple platforms and devices (i.e. functionality for tablets, macs, PCs, Chromebooks, smartphones, etc.) ● Technology enhances student understanding in the appropriate standards and supports the print resources ● Technology is interactive and adaptive when possible
Social Content	<p>Where applicable, the materials under review—</p> <ul style="list-style-type: none"> ● Do the materials accurately and equitably portray diverse religions, diverse cultures and races, various ages, people with varying abilities, as well as diverse sexual orientations and diverse gender identities? ● Do the materials emphasize diverse groups of people in varied, positive, and contributing roles? ● Do the print and/or online materials meet the diverse needs of all learners (English learners, students with special needs, advanced learners, learning styles, diverse cultures, etc.)?

**San Juan Unified School District
Curriculum and Professional Development Department**

Textbook Adoption

Report II

SUMMARY INFORMATION

1. Subject area or course:

Advanced Placement (AP) Spanish

2. Recommended text(s):

Temas, 3rd Edition, Vista Higher Learning, 2024

3. Rationale:

a. Title, publisher, copyright and year of adoption of current textbook:

Temas, Vista Higher Learning, 2014, adopted in 2017

b. Alignment with state or district textbook cycle:

The adoption of the AP Spanish Language and Culture materials is on cycle with the current SJUSD adoption matrix

c. Special considerations, if any:

None.

4. Adoption timeline:

Action	Date
Publisher presentations	Sept. 27, 2023
Public review period	October 11, 2023 - January 8, 2024
Committee makes a recommendation	January 23, 2024
Report II to Curriculum & Standards	March 20, 2024
Board discussion and action	April 23 and May 14, 2024
Materials delivered to sites	

5. Actual total cost over the life of the adoption for materials:

The total cost of the adoption is \$90,866.26.

Textbook Adoption – Report II – Page 2
AP Spanish Language and Culture

6. Source of funding:

The K-12 Instructional Materials Reserve (locally restricted) is the source of funding.

RECOMMENDATION PROCESS

7. List of adoption committee members:

See *Attachment A: List of Committee Members*

8. What criteria did piloting teachers use to evaluate materials?

The adoption committee evaluated the materials using the Category Key Indicators document.

See *Attachment B: Category Key Indicators*

9. What opportunities were provided for community input?

Community members were able to join the adoption committee. An application for committee participation was shared via the *San Juan Scene* newsletter and social media.

Opportunities to provide feedback on the materials were shared through district and school newsletters, the district website, the FACE webpage, multiple social media posts, through district-initiated phone and email messages to all families, as well as in *Behind the Scenes* and *San Juan Scene*. Flyers to share with families and community members explaining how they can review materials were posted at each high school's front office, in Central Enrollment, in the FACE Mobile, and at the fingerprinting station in the Human Resources Department at the District Office. In addition, a representative from PLI attended several events that families attend in order to advertise the materials adoptions. Dates for materials review and attendance at family events were as follows:

What	When	Where
Public review period	October 11, 2023 - January 8, 2024	Professional Learning & Innovation office and online
College Night	September 21, 2023	Rio Americano High School

Textbook Adoption – Report II – Page 3
AP Spanish Language and Culture

SPAC Meeting	October 5, 2023	SJUSD District Office Board Room
FACE Fall Conference	October 7, 2023	Arden Middle School
Family Leadership Academy	October 23, 2023	On Zoom
DELAC meeting	November 16, 2023	SJUSD District Office Board Room

FEEDBACK RESULTS

10. Considering the needs of district students, what are the strengths and limitations of the recommended materials?

Strengths
<ul style="list-style-type: none"> ● Substantial amount of authentic material in written and audio forms ● Sources come from real life situations, interviews, advertisements and include varied accents from around Spanish-speaking countries ● Each unit is scaffolded into manageable chunks that will ultimately conclude with an end-of-unit assessment ● Each “TEMA” (theme/topic) has subtopics “CONTEXTO” that align with AP Spanish Language and Culture course themes. They also allow for a more in depth understanding of the topics. ● End of unit assessment and other assessments and activities mirror the skills needed to prepare for the proficiencies required on the AP Exam
Limitations
<ul style="list-style-type: none"> ● Material and sources can become outdated quickly ● More differentiation to support student learning differences would be helpful. ● There is a lot of content--a pacing guide would help best make use of the materials

11. What were the results of the evaluation and what are the recommended materials?

The teacher evaluated the materials based on the Key Indicators and recommended *Temas, 3rd Edition*.

**Textbook Adoption – Report II – Page 4
AP Spanish Language and Culture**

12. List all the student and teacher components of the program, both purchased and gratis.

Student Components	Teacher Components
<ul style="list-style-type: none">● Student edition● Student worktext● 7-year digital access for the student platform	<ul style="list-style-type: none">● Teacher edition● 7-year digital access for the teacher platform

13. What professional learning will be offered to teachers? What costs will be associated with the training?

A professional learning session online is included in the cost of the adoption. This session will be scheduled in the fall. Teachers will also have the opportunity to work individually with the publisher for support.

14. Curriculum Department contact for additional information:

Nicole Kukral, Director, Professional Learning and Curriculum Innovation
nkukral@sanjuan.edu
(916) 979-8934

15. Date submitted Report II: March 20, 2024

Textbook Adoption – Report II – Page 5
AP Spanish Language and Culture

Attachment A: Adoption Committee Members

Name	School/Role
Luz Perry	El Camino High School/Teacher

Textbook Adoption – Report II – Page 6
AP Spanish Language and Culture

Attachment B: Category Key Indicators for Spanish AP Language and Culture

Category	Key Indicators
Content/ Alignment to Standards	<ul style="list-style-type: none"> Reflects and incorporates the content, big ideas and instructional approaches from the <u>2019 California World Languages Standards</u> and the <u>2020 California World Languages Framework</u> Provides explicit, sequential, logical, systematic instruction and diagnostic support Reflects accurate, current, and relevant content information
Program Organization	<ul style="list-style-type: none"> Includes enough material to support the entirety of the course Presents information and instruction systematically and logically for standards, tasks, and assessments Includes guidance for using all components of the program to support deep and meaningful student learning (including use of the target language and authentic materials) Includes helpful reference materials for teachers to use the program (clear table of contents, glossaries, unit/lesson overviews, etc.)
Assessment	<ul style="list-style-type: none"> Assesses understanding and application of skills and knowledge embedded in the program Provides opportunity for students to have experience in and practice with performance assessments in all three modes of communication Assesses students in several formats for immediate follow-up instruction, practice, and review Helps teachers plan and determine the effectiveness of classroom instruction
Universal Access	<ul style="list-style-type: none"> Provides resources and strategies that engage every student in the classroom Provides comprehensive support (scaffolding, modification) for teachers to provide effective instruction for special needs students and English learners Includes user friendly style/format (visual stimuli, graphics) that enhances learning Provides a variety of activities to facilitate retention and promote incorporation of objectives
Instructional Planning and Teacher Support	<ul style="list-style-type: none"> Identifies specific objectives, instructional examples and practice opportunities in every lesson Provides a list of necessary instructional materials for each lesson

Textbook Adoption – Report II – Page 7
AP Spanish Language and Culture

	<ul style="list-style-type: none"> ● Provides support/suggestions for the appropriate use of the program's technology ● Includes electronic resources that are integral to the program, not extraneous ● Provides homework suggestions that reinforce or extend classroom instruction
Digital Tools/ Online Resources	<ul style="list-style-type: none"> ● Includes clear and sufficient guidance to support teaching and learning of the targeted standards, including, when appropriate, the use of technology and media. ● Technology components are easy to access and user friendly for students and teachers ● Technology is available across multiple platforms and devices (i.e. functionality for tablets, macs, PCs, Chromebooks, smartphones, etc.) ● Technology enhances student understanding in the appropriate standards and supports the print resources ● Technology is interactive and adaptive when possible
Social Content	<p>Where applicable, the materials under review—</p> <ul style="list-style-type: none"> ● Do the materials accurately and equitably portray diverse religions, diverse cultures and races, various ages, people with varying abilities, as well as diverse sexual orientations and diverse gender identities? ● Do the materials emphasize diverse groups of people in varied, positive, and contributing roles? ● Do the print and/or online materials meet the diverse needs of all learners (English learners, students with special needs, advanced learners, learning styles, diverse cultures, etc.)?

**San Juan Unified School District
Curriculum and Professional Development Department**

Textbook Adoption

Report II

SUMMARY INFORMATION

1. Subject area or course:

Advanced Placement (AP) Physics C: Mechanics

2. Recommended text(s):

Physics for Scientists and Engineers, A Strategic Approach with Modern Physics, AP Edition, Pearson, 2022

3. Rationale:

a. Title, publisher, copyright and year of adoption of current textbook:

This is a new course, pending San Juan Unified School Board Approval

b. Alignment with state or district textbook cycle:

If approved by the San Juan Unified School Board, this course will be added to the district textbook cycle

c. Special considerations, if any:

None.

4. Adoption timeline:

Action	Date
Adoption Committee prescreens all available materials	October 25, 2022 - February 16, 2023
Public review period	October 11, 2022 - January 8, 2024
Committee makes a recommendation	October 30, 2023
Report II to Curriculum & Standards	March 20, 2024
Board discussion and action	April 23 and May 14, 2024
Materials delivered to sites	

5. Actual total cost over the life of the adoption for materials:

The total cost of the adoption is \$15,652.40

Textbook Adoption – Report II – Page 2
AP Physics C: Mechanics

6. Source of funding:

The K-12 Instructional Materials Reserve (locally restricted) is the source of funding.

RECOMMENDATION PROCESS

7. List of adoption committee members:

See *Attachment A: List of Committee Members*

8. What criteria did piloting teachers use to evaluate materials?

The adoption committee evaluated the materials using the Category Key Indicators document.

See *Attachment B: Category Key Indicators*

9. What opportunities were provided for community input?

Community members were able to join the adoption committee. An application for committee participation was shared via the *San Juan Scene* newsletter and social media.

Opportunities to provide feedback on the materials were shared through district and school newsletters, the district website, the FACE webpage, multiple social media posts, district-initiated phone and email messages to all families, as well as *Behind the Scenes* and *San Juan Scene*. Flyers that share with families and community members how they can review materials were posted at each high school's front office, in Central Enrollment, the FACE Mobile, and at the fingerprinting station in the Human Resources Department at the District Office. A representative from PLI attended several events for families in order to advertise the materials adoptions. In addition, community members could review materials online or in person. Dates for materials review and attendance at family events were as follows:

What	When	Where
Public review period	October 11, 2022 - January 8, 2024	Professional Learning & Innovation office and online
College Night	September 21, 2023	Rio Americano High School
SPAC Meeting	October 5, 2023	SJUSD District Office Board Room

Textbook Adoption – Report II – Page 3
AP Physics C: Mechanics

FACE Fall Conference	October 7, 2023	Arden Middle School
Family Leadership Academy	October 23, 2023	On Zoom
DELAC meeting	November 16, 2023	SJUSD District Office Board Room

FEEDBACK RESULTS

10. Considering the needs of district students, what are the strengths and limitations of the recommended materials?

Strengths
<ul style="list-style-type: none"> ● The textbook includes relevant, relatable, and content that is accessible to students. ● The textbook includes a section for review at the start of each chapter and unit and a clearly written summary at the end. ● The textbook has good problem sets, including a range of question levels. ● The textbook has a logically sequenced order of the units and chapters. ● The online platform includes videos and student resources to support the depth and breadth of the content.
Limitations
<ul style="list-style-type: none"> ● The book is large and heavy.

11. What were the results of the evaluation and what are the recommended materials?

After reviewing the materials, 2 of 2 committee members support the recommendation of *Physics for Scientists and Engineers, A Strategic Approach with Modern Physics, AP Edition*.

12. List all the student and teacher components of the program, both purchased and gratis.

Student Components	Teacher Components
<ul style="list-style-type: none"> ● Print student edition ● 7-year digital access for the student platform 	<ul style="list-style-type: none"> ● Print student edition ● Mastering Physics with eText ● Online Instructor Resources

**Textbook Adoption – Report II – Page 4
AP Physics C: Mechanics**

- 13. What professional learning will be offered to teachers? What costs will be associated with the training?**

Teachers will have the opportunity to work individually with the publisher for support.

The cost for the professional development as described above is included in the adoption.

- 14. Curriculum Department contact for additional information:**

Nicole Kukral, Director, Professional Learning and Curriculum Innovation
nkukral@sanjuan.edu
(916) 979-8934

- 15. Date submitted Report II:** March 20, 2024

Textbook Adoption – Report II – Page 5
AP Physics C: Mechanics

Attachment A: Adoption Committee Members

Name	School/Role
Charles Saylor	Bella Vista/Teacher
Robert Grupp	Rio Americano/Teacher

Textbook Adoption – Report II – Page 6
AP Physics C: Mechanics

Attachment B: Category Key Indicators for AP Physics C: Mechanics

Category Key Indicators for AP Science Course Review
San Juan Unified School District

Category	Key Indicators
Content/Alignment to Standards	<ul style="list-style-type: none"> • Reflects and incorporates the content, big ideas, and science practices from the College Board framework • Provides explicit, sequential, logical, systematic instruction and diagnostic support • Reflects accurate, current, and relevant content information
Program Organization	<ul style="list-style-type: none"> • Includes enough material to support the entirety of the course • Presents information and instruction systematically and logically for standards, tasks, and assessments • Includes guidance for using all components of the program to support deep and meaningful student learning (including lab activities) • Includes helpful reference materials for teachers to use the program (clear table of contents, glossaries, unit/lesson overviews, etc.)
Assessment	<ul style="list-style-type: none"> • Assesses understanding and application of skills and knowledge embedded in the program • Provides opportunity for students to have experience and practice in the AP style assessment format • Assesses students in several formats for immediate follow-up instruction, practice, and review • Helps teachers plan and determine the effectiveness of classroom instruction
Universal Access	<ul style="list-style-type: none"> • Provides resources and strategies that engage every student in the classroom • Provides comprehensive support (scaffolding, modification) for teachers to provide effective instruction for special needs students and English learners • Includes user friendly style/format (visual stimuli, graphics) that enhances learning • Provides a variety of activities to facilitate retention and promote incorporation of objectives
Instructional Planning and Teacher Support	<ul style="list-style-type: none"> • Identifies specific objectives, instructional examples and practice opportunities in every lesson • Provides a list of necessary instructional materials for each lesson • Provides support/suggestions for the appropriate use of the program's technology • Includes electronic resources that are integral to the program, not extraneous • Provides homework suggestions that reinforce or extend classroom instruction
Digital Tools/Online Resources	<ul style="list-style-type: none"> • Includes clear and sufficient guidance to support teaching and learning of the targeted standards, including, when appropriate, the use of technology and media. • Technology components are easy to access and user friendly for students and teachers • Technology is available across multiple platforms and devices (i.e. functionality for tablets, macs, PCs, Chromebooks, smartphones, etc.) • Enhances student understanding in the appropriate standards and supports the print resources • Technology is interactive and adaptive when possible
Social Content	<p>Where applicable, the materials under review—</p> <ul style="list-style-type: none"> • Do the materials accurately and equitably portray diverse religions, diverse cultures and races, various ages, people with varying abilities, as well as diverse sexual orientations and diverse gender identities? • Do the materials emphasize diverse groups of people in varied, positive, and contributing roles? • Do the print and/or online materials meet the diverse needs of all learners (English learners, students with special needs, advanced learners, learning styles, diverse cultures, etc.)

Textbook Adoption – Report II – Page 7
AP Physics C: Mechanics

Attachment B: Category Key Indicators for AP Physics C: Mechanics

Category	Key Indicators
Content/Alignment to Standards	<ul style="list-style-type: none"> ● Reflects and incorporates the content from the content, big ideas, and science practices from the College Board Framework for AP Physics C: Mechanics ● Provides explicit, sequential, logical, systematic instruction and diagnostic support ● Reflects accurate content information
Program Organization	<ul style="list-style-type: none"> ● Includes enough material to support the entirety of the course ● Presents information and instruction systematically and logically for standards, tasks, and assessments. ● Includes guidance for using all components of the program to support deep and meaningful student learning ● Includes helpful reference materials for teachers to use the program (clear table of contents, glossaries, unit/lesson overviews, etc.)
Assessment	<ul style="list-style-type: none"> ● Assesses understanding and application of skills and knowledge embedded in the program. ● Assesses students in several formats (summative and formative) for immediate follow-up instruction, practice, and review. Assessments should have multiple forms making revisions and retakes possible. ● Helps teachers plan and determine the effectiveness of classroom instruction
Universal Access	<ul style="list-style-type: none"> ● Provides resources and strategies that engage every student in the classroom ● Provides comprehensive support (scaffolding, modification) for teachers to provide effective instruction for special needs students and English learners. ● Includes user friendly style/format (visual stimuli, graphics) that enhances learning ● Provides a variety of activities to facilitate retention and promote incorporation of objectives
Instructional Planning and Teacher Support	<ul style="list-style-type: none"> ● Provides logical, explicit instructional guidelines for teachers to follow ● Includes a teacher planning guide explaining how to use components with alternative schedules ● Identifies specific objectives, instructional examples, and practice opportunities in every lesson ● Provides a list of necessary instructional materials for each lesson

Textbook Adoption – Report II – Page 8
AP Physics C: Mechanics

	<ul style="list-style-type: none"> ● Provides support/suggestions for the appropriate use of the program's technology ● Includes electronic resources that are integral to the program, not extraneous ● Provides homework suggestions that reinforce or extend classroom instruction
Digital Tools/Online Resources	<ul style="list-style-type: none"> ● Includes clear and sufficient guidance to support teaching and learning of the targeted standards, including, when appropriate, the use of technology and media. ● Technology components are easy to access and user friendly for students and teachers ● Technology is available across multiple platforms and devices (i.e. functionality for tablets, macs, PCs, Chromebooks, smartphones, connection to Google Classroom, etc.) ● Enhances student understanding in the appropriate grade level standards and supports the print resources ● Technology is interactive and adaptive when possible
Social Content <i>Social Justice Standards</i>	<ul style="list-style-type: none"> ● Materials accurately and equitably portray diverse religions, diverse cultures and races, various ages, people with varying abilities, as well as diverse sexual orientations and diverse gender identities. ● Materials emphasize diverse groups of people in varied, positive, and contributing roles. ● The print and/or online materials meet the diverse needs of all learners (English learners, students with special needs, advanced learners, learning styles, diverse cultures, additional languages as needed, etc.)

**San Juan Unified School District
Curriculum and Professional Development Department**

Textbook Adoption

Report II

SUMMARY INFORMATION FROM REPORT I

1. Subject area or course:

Psychology

2. Recommended text(s):

Psychology in Your Life, 4th High School Edition, Norton, 2022

3. Rationale:

a. Title, publisher, copyright and year of adoption of current textbook:

Thinking About Psychology, 3rd edition, Bedford, Freeman and Worth, 2013, adopted in 2016

b. Alignment with state or district textbook cycle:

The adoption of the Psychology materials is on cycle with the current SJUSD adoption matrix.

c. Special considerations, if any:

None.

4. Adoption timeline:

Action	Date
Adoption Committee prescreens all available materials	May 23 - July 13, 2023
Publisher presentations	July 11, 2023
Report I	November 1, 2023
Pilot cycle 1	August 21 - October 13, 2023
Pilot cycle 2	October 16 - December 15, 2023
Public review period	October 2, 2023 - January 8, 2024
Community showcase	September 21 and October 7, 2023
Committee makes a recommendation	January 16, 2024
Report II to Curriculum and Standards	March 20, 2024
Board discussion and action	April 23 and May 14, 2024
Materials delivered to sites	

Textbook Adoption – Report II – Page 2
Psychology

5. Actual total cost over the life of the adoption for materials:

The total cost of the adoption is \$94,855.50.

6. Source of funding:

The K-12 Instructional Materials Reserve (locally restricted) is the source of funding.

RECOMMENDATION PROCESS

7. List of adoption committee members:

See *Attachment A: List of Committee Members*

8. What criteria did piloting teachers use to evaluate materials?

The adoption committee evaluated the materials using the Category Key Indicators document.

See *Attachment B: Category Key Indicators*

9. In what ways were student responses solicited?

At the end of each cycle, students who participated in the pilot responded to a survey. Strengths and limitations shared by students are as follows:

Strengths
<ul style="list-style-type: none">● The students appreciated that the materials helped them learn new ideas and information.● The students enjoyed that their thinking and learning was assessed in a variety of ways.● The students appreciated that the materials reflected diverse groups of people in varied, positive, and contributing roles.
Limitations
<ul style="list-style-type: none">● Some students did not like the digital textbook and preferred the print text.

Textbook Adoption – Report II – Page 3
Psychology

10. What opportunities were provided for community input?

Community members were able to join the adoption committee. An application for committee participation was shared via the *San Juan Scene* newsletter and social media.

Opportunities to provide feedback on the materials were shared through district and school newsletters, the district website, the FACE webpage, multiple social media posts, district-initiated phone and email messages to all families, as well as *Behind the Scenes* and *San Juan Scene*. Flyers that share with families and community members how they can review materials were posted at each high school's front office, in Central Enrollment, the FACE Mobile, and at the fingerprinting station in the Human Resources Department at the District Office. A representative from PLI attended several events for families in order to advertise the materials adoptions. In addition, community members could review materials online or in person. Dates for materials review and attendance at family events were as follows:

What	When	Where
Public review period	October 2, 2023 - January 8, 2024	Professional Learning & Innovation office and online
College Night	September 21, 2023	Rio Americano High School
SPAC Meeting	October 5, 2023	SJUSD District Office Board Room
FACE Fall Conference	October 7, 2023	Arden Middle School
Family Leadership Academy	October 23, 2023	On Zoom
DELAC meeting	November 16, 2023	SJUSD District Office Board Room

FEEDBACK RESULTS

11. Considering the needs of district students, what are the strengths and limitations of the recommended materials?

Strengths
<ul style="list-style-type: none"> ● The videos are well-crafted and engaging. ● The vocabulary and chapter reviews support student learning. ● The materials are aligned to the expectations of the American Psychological Association and the Common Core State Standards. ● The materials seem to be appropriate for a one-semester course.
Limitations
<ul style="list-style-type: none"> ● The digital resources appear limited.

**Textbook Adoption – Report II – Page 4
Psychology**

12. What were the results of the final voting and what are the recommended instructional materials?

Using a consensus model, 2 of 2 committee members support the recommendation of *Psychology in Your Life*.

13. List all the student and teacher components of the program, both purchased and gratis.

Student Components	Teacher Components
<ul style="list-style-type: none">● Student edition● 7-year digital access for the student platform	<ul style="list-style-type: none">● Teacher desk copy● Teacher reference guide

14. What professional learning will be offered to teachers? What costs will be associated with the training?

Teachers will have the opportunity to attend a 3 hour session with the publisher and to collaborate with colleagues in June or August. Makeup training will be offered again in the fall for new teachers or those unable to attend the summer sessions. The cost for the professional development as described above is included in the adoption.

15. Curriculum Department contact for additional information:

Nicole Kukral, Director, Professional Learning and Curriculum Innovation
nkukral@sanjuan.edu
(916) 979-8934

16. Date submitted Report II: March 20, 2024

Textbook Adoption – Report II – Page 5
Psychology

Attachment A: Adoption Committee Members

Name	School/Role
Audrey Cornelison	Mira Loma High School/Teacher
Cyndi Otero	Casa Roble High School/Teacher
Patrick Pavelchik	Mesa Verde High School/Teacher
Jay Powell	Mesa Verde High School/Teacher

Textbook Adoption – Report II – Page 6
Psychology

Attachment B: Category Key Indicators for Psychology

Category	Key Indicators
Content/Alignment to Standards	<ul style="list-style-type: none"> ● Reflects and incorporates the content from the standards: ELD Standards, History Social Science Framework, CCSS Literacy Standards for History Social Science, American Psychological Association National Standards for High School Psychology Curricula ● Provides explicit, sequential, logical, systematic instruction and diagnostic support ● Reflects accurate content information
Program Organization	<ul style="list-style-type: none"> ● Includes enough material to support the entirety of the course ● Presents information and instruction systematically and logically for standards, tasks, and assessments. ● Includes guidance for using all components of the program to support deep and meaningful student learning ● Includes helpful reference materials for teachers to use the program (clear table of contents, glossaries, unit/lesson overviews, etc.)
Assessment	<ul style="list-style-type: none"> ● Assesses understanding and application of skills and knowledge embedded in the program. ● Assesses students in several formats (summative and formative) for immediate follow-up instruction, practice, and review. Assessments should have multiple forms making revisions and retakes possible. ● Helps teachers plan and determine the effectiveness of classroom instruction
Universal Access	<ul style="list-style-type: none"> ● Provides resources and strategies that engage every student in the classroom ● Provides comprehensive support (scaffolding, modification) for teachers to provide effective instruction for special needs students and English learners. ● Includes user friendly style/format (visual stimuli, graphics) that enhances learning ● Provides a variety of activities to facilitate retention and promote incorporation of objectives
Instructional Planning and Teacher Support	<ul style="list-style-type: none"> ● Provides logical, explicit instructional guidelines for teachers to follow ● Includes a teacher planning guide explaining how to use components with alternative schedules ● Identifies specific objectives, instructional examples, and practice opportunities in every lesson

Textbook Adoption – Report II – Page 7
Psychology

	<ul style="list-style-type: none"> ● Provides a list of necessary instructional materials for each lesson ● Provides support/suggestions for the appropriate use of the program's technology ● Includes electronic resources that are integral to the program, not extraneous ● Provides homework suggestions that reinforce or extend classroom instruction
Digital Tools/Online Resources	<ul style="list-style-type: none"> ● Includes clear and sufficient guidance to support teaching and learning of the targeted standards, including, when appropriate, the use of technology and media. ● Technology components are easy to access and user friendly for students and teachers ● Technology is available across multiple platforms and devices (i.e. functionality for tablets, macs, PCs, Chromebooks, smartphones, connection to Google Classroom, etc.) ● Enhances student understanding in the appropriate grade level standards and supports the print resources ● Technology is interactive and adaptive when possible
Social Content <i>Social Justice Standards</i>	<ul style="list-style-type: none"> ● Materials accurately and equitably portray diverse religions, diverse cultures and races, various ages, people with varying abilities, as well as diverse sexual orientations and diverse gender identities. ● Materials emphasize diverse groups of people in varied, positive, and contributing roles. ● The print and/or online materials meet the diverse needs of all learners (English learners, students with special needs, advanced learners, learning styles, diverse cultures, additional languages as needed, etc.)

**San Juan Unified School District
Curriculum and Professional Development Department**

Textbook Adoption

Report II

SUMMARY INFORMATION

1. Subject area or course:

Sociology

2. Recommended text(s):

The Real World: An Introduction to Sociology, Ninth High School Edition, Norton, 2024

3. Rationale:

a. Title, publisher, copyright and year of adoption of current textbook:

Sociology and You, McGraw-Hill, 2014, adopted in 2017

b. Alignment with state or district textbook cycle:

The adoption of the Sociology materials is on cycle with the current SJUSD adoption matrix

c. Special considerations, if any:

None.

4. Adoption timeline:

Action	Date
Adoption Committee prescreens all available materials	September 13, 2023
Publisher presentations	November 16, 2023
Public review period	October 2, 2023 - January 8, 2024
Committee makes a recommendation	January 25, 2024
Report II to Curriculum and Standards	March 20, 2024
Board discussion and action	April 23 and May 14, 2024
Materials delivered to sites	

Textbook Adoption – Report II – Page 2
Sociology

5. Actual total cost over the life of the adoption for materials:

The total cost of the adoption is \$17,640.00.

6. Source of funding:

The K-12 Instructional Materials Reserve (locally restricted) is the source of funding.

RECOMMENDATION PROCESS

7. List of adoption committee members:

See *Attachment A: List of Committee Members*

8. What criteria did piloting teachers use to evaluate materials?

The adoption committee evaluated the materials using the Category Key Indicators document.

See *Attachment B: Category Key Indicators*

9. What opportunities were provided for community input?

Community members were able to join the adoption committee. An application for committee participation was shared via the *San Juan Scene* newsletter and social media.

Opportunities to provide feedback on the materials were shared through district and school newsletters, the district website, the FACE webpage, multiple social media posts, district-initiated phone and email messages to all families, as well as *Behind the Scenes* and *San Juan Scene*. Flyers that share with families and community members how they can review materials were posted at each high school's front office, in Central Enrollment, the FACE Mobile, and at the fingerprinting station in the Human Resources Department at the District Office. A representative from PLI attended several events for families in order to advertise the materials adoptions. In addition, community members could review materials online or in person. Dates for materials review and attendance at family events were as follows:

What	When	Where
Public review period	October 2, 2023 - January 8, 2024	Professional Learning & Innovation office and online

Textbook Adoption – Report II – Page 3
Sociology

College Night	September 21, 2023	Rio Americano High School
SPAC Meeting	October 5, 2023	SJUSD District Office Board Room
FACE Fall Conference	October 7, 2023	Arden Middle School
Family Leadership Academy	October 23, 2023	On Zoom
DELAC meeting	November 16, 2023	SJUSD District Office Board Room

FEEDBACK RESULTS

10. Considering the needs of district students, what are the strengths and limitations of the recommended materials?

Strengths
<ul style="list-style-type: none"> ● The textbook appears well-crafted and engaging for students. ● The content is current, diverse, and inclusive. ● The materials are aligned to the expectations of the American Sociological Association and the Common Core State Standards. ● The materials seem to be appropriate for a one-semester course.
Limitations
<ul style="list-style-type: none"> ● The digital resources appear limited.

11. What were the results of the final voting and what are the recommended instructional materials?

After reviewing the materials, 2 of 2 committee members support the recommendation of *The Real World: An Introduction to Sociology*.

12. List all the student and teacher components of the program, both purchased and gratis.

Student Components	Teacher Components
<ul style="list-style-type: none"> ● Student edition ● 7-year digital access for the student platform 	<ul style="list-style-type: none"> ● Teacher desk copy ● Teacher reference guide

**Textbook Adoption – Report II – Page 4
Sociology**

13. What professional learning will be offered to teachers? What costs will be associated with the training?

Teachers will have the opportunity to attend a 3 hour session with the publisher and to collaborate with colleagues in June or August. Makeup training will be offered again in the fall for new teachers or those unable to attend the summer sessions. The cost for the professional development as described above is included in the adoption.

14. Curriculum Department contact for additional information:

Nicole Kukral, Director, Professional Learning and Curriculum Innovation
nkukral@sanjuan.edu
(916) 979-8934

15. Date submitted Report II: March 20, 2024

Textbook Adoption – Report II – Page 5
Sociology

Attachment A: Adoption Committee Members

Name	School/Role
Beth Crews	Casa Roble High School/Teacher
Patrick Pavelchick	Mesa Verde High School/Teacher

Textbook Adoption – Report II – Page 6
Sociology

Attachment B: Category Key Indicators for Sociology

Category	Key Indicators
Content/Alignment to Standards	<ul style="list-style-type: none"> ● Reflects and incorporates the content from the standards: ELD Standards, History Social Science Framework, CCSS Literacy Standards for History Social Science, American Sociological Association High School Standards ● Provides explicit, sequential, logical, systematic instruction and diagnostic support ● Reflects accurate content information
Program Organization	<ul style="list-style-type: none"> ● Includes enough material to support the entirety of the course ● Presents information and instruction systematically and logically for standards, tasks, and assessments. ● Includes guidance for using all components of the program to support deep and meaningful student learning ● Includes helpful reference materials for teachers to use the program (clear table of contents, glossaries, unit/lesson overviews, etc.)
Assessment	<ul style="list-style-type: none"> ● Assesses understanding and application of skills and knowledge embedded in the program. ● Assesses students in several formats (summative and formative) for immediate follow-up instruction, practice, and review. Assessments should have multiple forms making revisions and retakes possible. ● Helps teachers plan and determine the effectiveness of classroom instruction
Universal Access	<ul style="list-style-type: none"> ● Provides resources and strategies that engage every student in the classroom ● Provides comprehensive support (scaffolding, modification) for teachers to provide effective instruction for special needs students and English learners. ● Includes user friendly style/format (visual stimuli, graphics) that enhances learning ● Provides a variety of activities to facilitate retention and promote incorporation of objectives
Instructional Planning and Teacher Support	<ul style="list-style-type: none"> ● Provides logical, explicit instructional guidelines for teachers to follow ● Includes a teacher planning guide explaining how to use components with alternative schedules ● Identifies specific objectives, instructional examples, and practice opportunities in every lesson ● Provides a list of necessary instructional materials for each lesson

Textbook Adoption – Report II – Page 7
Sociology

	<ul style="list-style-type: none"> ● Provides support/suggestions for the appropriate use of the program's technology ● Includes electronic resources that are integral to the program, not extraneous ● Provides homework suggestions that reinforce or extend classroom instruction
Digital Tools/Online Resources	<ul style="list-style-type: none"> ● Includes clear and sufficient guidance to support teaching and learning of the targeted standards, including, when appropriate, the use of technology and media. ● Technology components are easy to access and user friendly for students and teachers ● Technology is available across multiple platforms and devices (i.e. functionality for tablets, macs, PCs, Chromebooks, smartphones, connection to Google Classroom, etc.) ● Enhances student understanding in the appropriate grade level standards and supports the print resources ● Technology is interactive and adaptive when possible
Social Content <i>Social Justice Standards</i>	<ul style="list-style-type: none"> ● Materials accurately and equitably portray diverse religions, diverse cultures and races, various ages, people with varying abilities, as well as diverse sexual orientations and diverse gender identities. ● Materials emphasize diverse groups of people in varied, positive, and contributing roles. ● The print and/or online materials meet the diverse needs of all learners (English learners, students with special needs, advanced learners, learning styles, diverse cultures, additional languages as needed, etc.)

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: G-8

MEETING DATE: 05/14/2024

SUBJECT: Head Start (HS) and Early Head Start (EHS) Grant
Resolution Fiscal Year 2024-25

DEPARTMENT: Early Childhood Education

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

ACTION REQUESTED:

The superintendent is recommending the board adopt Resolution No. 4133 approving the Head Start and Early Head Start grant resolution with Sacramento Employment and Training Agency (SETA).

RATIONALE/BACKGROUND:

The annual HS and EHS grant resolution is an agreement to implement the HS and EHS funding for fiscal year 2024-25. HS and EHS are comprehensive programs designed to meet the needs of pregnant women and children from infancy through five years of age, including infant, toddler, and preschool programs.

ATTACHMENT(S):

A: Resolution No. 4133

BOARD COMMITTEE ACTION/COMMENT:

N/A

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FISCAL IMPACT:

Current Budget: Head Start \$ 10,385,645
Funding Source: Head Start/Early Head Start
Current Year Only On-going

LCAP/STRATEGIC PLAN:

Goal: 1,2 Focus: N/A
Action: N/A
Strategic Plan: 1,2

PREPARED BY: Lisa Teal, Program Manager, Early Childhood Education

APPROVED BY: Amberlee Townsend-Snider, Assistant Superintendent, Elementary Education and Programs ^{ATS}
Amy L. Slavensky, Ph.D., Interim Deputy Superintendent, Schools and Student Support ^{ADS}
Melissa Bassanelli, Superintendent of Schools *Mb*

RESOLUTION NO. 4133

RESOLUTION AUTHORIZING EXECUTION OF DELEGATE AGENCY AGREEMENT

FROM THE SACRAMENTO EMPLOYMENT AND TRAINING AGENCY

(GOVERNMENTAL ENTITY)

WHEREAS, San Juan Unified School District,
(Legal Name of Entity)

a California local governmental entity (hereinafter referred to as "DELEGATE"), desires to enter into an AGREEMENT with the SACRAMENTO EMPLOYMENT AND TRAINING AGENCY, a Joint Powers Agency and Head Start Grantee (hereinafter referred to as "SETA"), for the operation of a Head Start Program under the Head Start Act, 42 U.S.C. Section 9801, et seq., as amended;

THEREFORE, BE IT RESOLVED THAT the Governing Body of DELEGATE hereby authorizes the execution of AGREEMENT # 25C6651S0 by and between DELEGATE and SETA; and

BE IT FURTHER RESOLVED THAT any individual employed by DELEGATE in the position(s) of:

Title

1. Amberlee Townsend-Snider, Assistant Superintendent
2. Lisa Teal, Program Manager, Early Childhood Education
3. _____

is/are hereby authorized on behalf of and in the name of DELEGATE and as its official act and deed to sign and otherwise enter into AGREEMENT # 25C6651S0 with SETA; and

BE IT FURTHER RESOLVED THAT any individual employed by DELEGATE in the position(s) of:

Title

1. Meghan Jorgensen, Early Childhood Education
2. _____
3. _____

shall be authorized to act on behalf of DELEGATE with respect to this AGREEMENT

25C6651S0 by and between DELEGATE and SETA and that SETA may rely upon any communication or act, including telephone communication, made by the individuals authorized to act on behalf of DELEGATE pursuant to this resolution; and

BE IT FURTHER RESOLVED THAT the following individuals comprise the entire Governing Body of DELEGATE***:

<u>Name</u>	<u>Address</u>	<u>City, Zip Code</u>
1. <u>Pam Costa, President</u>	<u>3738 Walnut Avenue</u>	<u>Carmichael, 95608</u>
2. <u>Saul Hernandez, Vice Presider</u>	<u>3738 Walnut Avenue</u>	<u>Carmichael, 95608</u>
3. <u>Ben Avey, Clerk</u>	<u>3738 Walnut Avenue</u>	<u>Carmichael, 95608</u>
4. <u>Paula Villescaz, Member</u>	<u>3738 Walnut Avenue</u>	<u>Carmichael, 95608</u>
5. <u>Tanya Kravchuk, Member</u>	<u>3738 Walnut Avenue</u>	<u>Carmichael, 95608</u>
6. <u>Manuel Perez, Member</u>	<u>3738 Walnut Avenue</u>	<u>Carmichael, 95608</u>
7. <u>Zima Creason, Member</u>	<u>3738 Walnut Avenue</u>	<u>Carmichael, 95608</u>
8. _____	_____	_____
9. _____	_____	_____

*** Add additional pages if necessary

AND BE IT FURTHER RESOLVED THAT the authority conferred pursuant to this resolution and the representations contained herein shall remain in full force and effect until written notice of the revocation thereof shall have been received by SETA.

I, Ben Avey
(Name/Title)
of San Juan Unified School District, a California
(Legal Name of Entity)

local governmental entity, do hereby certify and declare that the foregoing is a full, true and complete copy of a resolution duly passed and adopted by the Governing Body of said entity at a meeting of said Body duly and regularly called, noticed and held, at

3738 Walnut Ave, Carmichael, Ca 95608, on the 14 day of May, 2024, at which meeting a quorum of the Governing Body was present and a majority of which quorum voted in favor of said resolution, and that said resolution is now in full force and effect.

I have executed this Resolution on this 14 day of May, 2024.

(Name of Entity)

BY: _____
(Signature)

Ben Avey
(Typed Name)

Clerk, Board of Education
(Title)

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: G-9

MEETING DATE: 05/14/2024

SUBJECT: 2022-2023 Audit Reports for Measures J, N, P and S

CHECK ONE:

- | | |
|-------------------|-------------------------------------|
| For Discussion: | <input type="checkbox"/> |
| For Action: | <input checked="" type="checkbox"/> |
| Report: | <input type="checkbox"/> |
| Workshop: | <input type="checkbox"/> |
| Recognition: | <input type="checkbox"/> |
| Emergency Action: | <input type="checkbox"/> |

DEPARTMENT: Fiscal Services

ACTION REQUESTED:

The superintendent is recommending that the board accept the 2022-2023 Audit Reports for Measures J, N, P and S as prepared by Gilbert Associates, Inc. (the district's independent auditor for Measures J, N, P and S).

RATIONALE/BACKGROUND:

Each year the agreed-upon procedures for Measure S and the annual financial and performance audit for Measures J, N and P general obligation bonds are conducted by the district's outside auditor. Measures J, N and P are subject to the requirements of Proposition 39, passed in 2000. These audits are for the bond funds for the year ending June 2023 and are conducted in accordance with the Government Auditing Standards issued by the Comptroller General of the United States.

Gilbert Associates, Inc., has expressed its opinion, "The financial statements referred to Measures J, N and P present fairly, in all material respects, the financial position of the Measures J, N and P Building Fund of the district, as of June 30, 2023, and the changes in financial position thereof for the year then ended in accordance with accounting principles generally accepted in the United States of America."

As for the performance audit report, Gilbert concluded that, "Based upon the procedures performed, we found that, for the items tested, the San Juan Unified School District has properly accounted for the expenditures of Measures J, N and P General Obligation Bonds."

ATTACHMENT(S):

- A: 2023 Final Measure S AUP Report
- B: 2023 Final Measure J Bond Report
- C: 2023 Final Measure J Prop 39 Report
- D: 2023 Final Measure N Bond Report
- E: 2023 Final Measure N Prop 39 Report
- F: 2023 Final Measure P Bond Report
- G: 2023 Final Measure P Prop 39 Report

BOARD COMMITTEE ACTION/COMMENT:

Bond Oversight Committee: 04/25/2024

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FISCAL IMPACT:

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

LCAP/STRATEGIC PLAN:

Goal: _____ N/A Focus: _____ N/A
Action: _____ N/A
Strategic Plan: _____ N/A

PREPARED BY:

Kristi Blandford, Director, Fiscal Services
Joel Ryan, Chief Financial Officer

**APPROVED BY:**

Melissa Bassanelli, Superintendent of Schools





INDEPENDENT ACCOUNTANTS REPORT ON APPLYING AGREED-UPON PROCEDURES

Board of Education
 San Juan Unified School District
 3738 Walnut Avenue
 Carmichael, California 95609-0477

We have performed the procedures enumerated below on San Juan Unified School District (District) management's assertions concerning Measure "S" ballot language and San Juan Unified School District Board of Education Resolution No. 2090 as of and for the year ended June 30, 2023. District management is responsible for evaluating assertions concerning Measure "S" ballot language and San Juan Unified School District Board of Education Resolution No. 2090.

The Board of Education has agreed to and acknowledged that the procedures performed are appropriate to meet the intended purpose of the engagement, which is to assist in evaluating San Juan Unified School District management assertions concerning Measure "S" ballot language and Resolution No 2090 for the year ended June 30, 2023.

- A. That "Measure S Bond funds are spent only on school improvements, not on District salaries or administration."
- B. That the District has continued "funding the Deferred Maintenance Program at a level of no less than \$2 million annually."
- C. That the District has funded "housekeeping and maintenance and operations budgets as necessary to properly maintain all District facilities."

This report may not be suitable for any other purpose. The procedures performed may not address all the items of interest to a user of this report and may not meet the needs of all users in this report and, as such, users are responsible for determining whether the procedures performed are appropriate for their purposes.

The procedures and associated findings are as follows:

- A. We obtained the Measure S Building Fund detailed general ledger for the fiscal year ended June 30, 2023. We applied the following procedures to this report:
 - 1. Recomputed subtotals and totals of the report. No exceptions noted.
 - 2. Reviewed the detailed general ledger for unallowable expenditures. No exceptions noted.
- B. The District's Deferred Maintenance Program was funded at an amount of \$2 million for the 2022-2023 fiscal year, which meets the requirement of at least \$2 million annually. The \$2 million was transferred from the General Fund. We agreed these totals to the District's audited financial statements for the year ended June 30, 2023. No exceptions noted.

- C. On June 28, 2022, the 2022-23 Budget was adopted by the Board of Education. Included in the 2022-23 Budget is the School District Criteria and Standards Review. The standard for criterion 7 is to "confirm that the annual contribution for facilities maintenance funding is not less than the amount required pursuant to Education Code Section 17070.75, if applicable, and that the district is providing adequately to preserve the functionality of its facilities for their normal life in accordance with Education Code sections 52060(d)(1) and 17002(d)(1)." The District met this standard and fulfilled the requirement for budgeting for the Restricted Routine Maintenance Account. For the year ended June 30, 2023, the District fulfilled the requirement by transferring \$15,852,237 from the General Fund Unrestricted accounts to General Fund Restricted Routine Maintenance Account. No exceptions noted.

We were engaged by the District to perform this agreed-upon procedures engagement and conducted an engagement in accordance with attestation standards established by the American Institute of Certified Public Accountants. We were not engaged and did not conduct an examination or review engagement, the objective of which would be the expression of such an opinion or conclusion. Accordingly, we do not express such an opinion or conclusion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

We are required to be independent of the District and to meet our ethical responsibilities, in accordance with the relevant ethical requirements related to our agreed-upon procedures engagement.

This report is intended solely for the information and use of the Board of Education and is not intended to be and should not be used by anyone other than these specified parties.

Gilbert CPAs

GILBERT CPAs
Sacramento, California

April 15, 2024

**SAN JUAN UNIFIED SCHOOL
DISTRICT
MEASURE J BUILDING FUND
CARMICHAEL, CALIFORNIA**

**FINANCIAL STATEMENTS WITH
INDEPENDENT AUDITOR'S REPORTS**

YEAR ENDED JUNE 30, 2023

**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE J BUILDING FUND**

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INDEPENDENT AUDITOR'S REPORT

**Independent Bond Citizens' Oversight Committee
and Board of Education
San Juan Unified School District
Carmichael, California**

Report on the Audit of the Financial Statements

Opinion

We have audited the accompanying financial statements of the Measure J Building Fund of the San Juan Unified School District (the District) as of and for the year ended June 30, 2023, and the related notes to the financial statements, as listed in the table of contents.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Measure J Building Fund of the District as of June 30, 2023, and the changes in financial position for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the District and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Emphasis of Matter

As discussed in Note 1, the financial statements present only the Measure J Building Fund, and do not purport to, and do not present fairly the financial position of the District as of June 30, 2023, or the changes in its financial position for the year then ended in conformity with accounting principles generally accepted in the United States of America. Our opinion is not modified with respect to this matter.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibilities for the Audit of the Financial Statements

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

In performing an audit in accordance with generally accepted auditing standards and *Government Auditing Standards*, we:

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

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

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated April 15, 2024, on our consideration of the District's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the District's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering District's internal control over financial reporting and compliance.

Gilbert CPAs

GILBERT CPAs
Sacramento, California

April 15, 2024

FINANCIAL STATEMENTS

**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE J BUILDING FUND**

**BALANCE SHEET
JUNE 30, 2023**

ASSETS:

Restricted cash and cash equivalents	\$ 12,379,572
Accounts receivable	<u>165,729</u>
Total assets	<u>\$ 12,545,301</u>

LIABILITIES AND FUND BALANCE:

Accounts payable	\$ 45,349
Fund balance - restricted	<u>12,499,952</u>
Total liabilities and fund balance	<u>\$ 12,545,301</u>

**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE J BUILDING FUND**

**STATEMENT OF REVENUES, EXPENDITURES, AND CHANGE IN FUND BALANCE
YEAR ENDED JUNE 30, 2023**

REVENUES:

Interest	\$ 215,773
Other local sources	<u>762,740</u>
Total revenues	<u>978,513</u>

EXPENDITURES:

Classified salaries	16,185
Employee benefits	4,459
Books and supplies	25,985
Contract services and other operating expenditures	37,260
Capital outlay	<u>1,528,892</u>
Total expenditures	<u>1,612,781</u>
Deficiency of revenues under expenditures	<u>(634,268)</u>

OTHER FINANCING SOURCES:

Transfers in	<u>8,783,224</u>
Change in fund balance	8,148,956

RESTRICTED FUND BALANCE - BEGINNING OF YEAR

4,350,996

RESTRICTED FUND BALANCE - END OF YEAR

\$ 12,499,952

**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE J BUILDING FUND**

**NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023**

1. ORGANIZATION AND NATURE OF ACTIVITIES

The San Juan Unified School District (the District) was established in 1960 and serves a 75-square mile area covering the communities of Arden-Arcade, Carmichael, Citrus Heights, Fair Oaks, Gold River, and Orangevale. The District currently operates 65 schools and provides early learning, kindergarten through 12th grade, and adult program education to approximately 40,000 students.

These financial statements present only the Measure J General Obligation Bonds Building Fund, which is recorded in sub-Fund 23 (Measure J Building Fund) of Fund 21 (Building Fund) in the District's audited financial statements for the year ended June 30, 2023. These financial statements do not include financial data for the remainder of the District's funds and component unit, which accounting principles generally accepted in the United States of America require to be presented with the financial statements of the District.

On November 5, 2002, the electorate of the District approved the \$350 million Measure J general obligation bonds with greater than 55% of the votes in favor.

- On July 31, 2003, the District issued General Obligation Bonds (Series 2003) in the amount of \$46,000,000 to build, acquire, construct, and furnish school facilities. The bonds mature in 2028. The bonds were issued at interest rates ranging from 1.00% to 5.80%. With the issuance of the 2012 General Obligation Refunding Bonds in March 2012, \$24,705,000 of Series 2003 Bonds were refunded.
- On August 12, 2004, the District issued General Obligation Bonds (Series 2004A Bonds) consisting of current interest bonds totaling \$67,205,000 and capital appreciation bonds totaling \$1,794,931 to build, acquire, construct, and furnish school facilities. The interest rates vary on the current interest bonds from 2.00% to 5.00% and mature through 2027. The capital appreciation bonds carry interest rates of 5.52% and 5.53% and mature in August 2028 and 2030. With the issuance of the 2012 General Obligation Refunding Bonds, Series C in September 2012, \$37,000,000 of Series 2004A Bonds were refunded.
- On August 5, 2007, the District issued General Obligation Bonds (Series 2007 Bonds) in the amount of \$70,000,000 to build, acquire, construct, and furnish school facilities. These bonds matured during 2016, and were issued at interest rates ranging from 4.25% to 5.00%. With the issuance of the 2014 General Obligation Refunding Bonds in May 2014, \$47,060,000 of Series 2007 Bonds were refunded.
- On July 23, 2010, the District issued General Obligation Bonds (Series 2010 Bonds) in the amount of \$55,000,000 to build, acquire, construct, and furnish school facilities. These bonds mature during succeeding years through August 2034, and were issued at interest rates ranging from 2.25% to 5.00%. With the issuance of the 2017 General Obligation Refunding Bond in March 2017, outstanding bonds matured during succeeding years through August 2020.
- On June 10, 2011, the District issued General Obligation Bonds (Series 2011 Bonds) in the amount of \$10,600,000 to build, acquire, construct, and furnish school facilities. These bonds mature during succeeding years through June 2026, and were issued at interest rates ranging from 0.80% to 5.50%.

**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE J BUILDING FUND**

**NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023**

- On March 22, 2012, the District issued General Obligation Refunding Series B Bonds (2012B Refunding Bonds) in the amount of \$23,190,000 to refund the District's Series 2003 bonds. The bonds mature during succeeding years through August 2028. The bonds were issued at interest rates ranging from 2.00 to 5.00%. On October 29, 2020, these bonds were refunded in part by the District's issuance of the 2020 General Obligation Refunding Bonds.
- On September 13, 2012, the District issued General Obligation Refunding Series C Bonds (2012C Refunding Bonds) in the amount of \$36,480,000 to refund a portion of the District's Series 2004A bonds. The bonds mature during succeeding years through August 2027. The bonds were issued at interest rates ranging from 2.00% to 5.00%. On October 29, 2020, these bonds were refunded in part by the District's issuance of the 2020 General Obligation Refunding Bonds.
- On January 13, 2013, the District issued General Obligation Bonds (Series 2013 Bonds) in the amount of \$50,000,000 to build, acquire, construct, and furnish school facilities. The bonds mature during succeeding years through August 2038. The bonds were issued at interest rates ranging from 3.00% to 5.00%. On October 29, 2020, these bonds were refunded in part by the District's issuance of the 2020 General Obligation Refunding Bonds.
- On May 1, 2014, the District issued General Obligation Bonds (Series May 2014 Bonds) in the amount of \$44,265,000 to refund a portion of the District's outstanding Series 2007 Bonds. The bonds mature during succeeding years through August 2030. The bonds were issued at interest rates ranging from 2.00% to 5.00%. On October 29, 2020, these bonds were refunded in part by the District's issuance of the 2020 General Obligation Refunding Bonds.
- On July 1, 2014, the District issued General Obligation Bonds (Series July 2014 Bonds) in the amount of \$25,925,000 to build, acquire, construct, and furnish school facilities. The bonds mature during succeeding years through August 2032. The bonds were issued at interest rates ranging from 2.00% to 5.00%. On October 29, 2020, these bonds were refunded in part by the District's issuance of the 2020 General Obligation Refunding Bonds.
- On March 1, 2017, the District issued General Obligation Bonds Election of 2002, (Series 2017 Bonds) in the amount of \$23,475,000 to finance specific construction, acquisition, and modernization projects. The bonds mature during succeeding years through August 2022. The bonds were issued at an interest rate ranging from 2.00% to 3.00%.
- On March 1, 2017, the District issued General Obligation Bonds Election of 2002 (2017 Refunding Bonds) in the amount of \$37,890,000 to refund a portion of the District's Series 2010 Bonds. The bonds mature during succeeding years through August 2026. The bonds were issued at interest rates ranging from 2.000% to 3.375%.
- On October 29, 2020, the District issued 2020 General Obligation Refunding Bonds in the amount of \$143,090,000. The bonds range in maturity date with final payoff on August 1, 2034 and interest rates ranging from 0.265% - 2.416%. The bonds were issued by the District to refund approximately \$143,000,000 in callable maturities and on bonds outstanding in Refunding Series A and B, Refunding Series C, Series 2013, Series 2014 Refunding, and Series 2014. All series included in the refunding, with the exception of the Refunding Series A, were authorized pursuant to Measure J.

SAN JUAN UNIFIED SCHOOL DISTRICT MEASURE J BUILDING FUND

NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023

As of June 30, 2023, total outstanding debt related to Measure J is \$41,774,932.

The Board of Supervisors of Sacramento County is empowered and obligated to annually levy *ad valorem* taxes, without limitation as to rate or amount, upon all property subject to taxation within the District (except for certain property which is taxable at limited rates), for payment of interest and principal of the Bonds when due. The District has established separate debt service funds to account for the collection and remittance of bond principal and interest payments. Additional information on the bonds' payment schedules can be found in the District's financial statements.

2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Basis of presentation – The District accounts for its financial transactions in accordance with the policies and procedures of the California Department of Education's *California School Accounting Manual*. The accounting policies of the District conform to accounting principles generally accepted in the United States of America as prescribed by the Governmental Accounting Standards Board (GASB) and the American Institute of Certified Public Accountants (AICPA).

Measurement focus and basis of accounting – Measurement focus indicates the type of resources being measured, while the basis of accounting indicates the timing of transactions or events for recognition in the financial statements. The Measure J Building Fund is a governmental fund, and has been presented using the current financial resources measurement focus and the modified accrual basis of accounting. Revenues are recognized as soon as they are both measurable and available, and are considered to be available when they are collectible within the current period or soon enough thereafter to pay liabilities of the current period. For this purpose, the District considers revenues to be available if they are collected within 60 days of the end of the current fiscal period. Expenditures are generally recorded when the related liability is incurred.

Cash and cash equivalents – For the purpose of the financial statements, cash equivalents are defined as financial instruments with an original maturity of three months or less.

Restricted cash and cash equivalents – Cash that is externally restricted to purchase or construct capital or other assets is classified as a restricted asset in the balance sheets.

Restricted fund balance – Restricted fund balance includes resources which are legally or contractually restricted by external third parties. Fund balance is restricted for capital projects of the Measure J Building Fund in accordance with the project list for the 2002 General Obligation Bonds.

Estimates used in financial reporting – In preparing financial statements in conformity with accounting principles generally accepted in the United States of America, management is required to make estimates and assumptions that affect the reported amounts of assets and liabilities and the disclosure of contingent assets and liabilities at the date of the financial statements and revenues and expenditures during the reporting period. Actual results could differ from those estimates.

**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE J BUILDING FUND**

**NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023**

3. RESTRICTED CASH AND EQUIVALENTS

Cash and equivalents as of June 30, 2023, consist of the following:

Cash and equivalents with County Treasury	\$ 12,377,677
Cash and equivalents with fiscal agents	<u>1,895</u>
Total cash and equivalents	<u><u>\$ 12,379,572</u></u>

Cash and equivalents in County Treasury – The Measure J Building Fund maintains cash in the Sacramento County Treasury (the Treasury). The Treasury pools funds with those of other districts in the county and invests the cash. The share of each fund in the pooled cash account is separately accounted for and interest earned is apportioned quarterly based on the relationship of a fund's daily balance to the total of pooled cash and investments.

Participants' equity in the Treasury investment pool is determined by the dollar amount of the participant deposits, adjusted for withdrawals and distributed income.

The Treasury is authorized to deposit cash and invest excess funds by California Government Code Section 53648 et seq. and is restricted by Government Code Section 53635, pursuant to Section 53601.

Cash and equivalents with fiscal agent – Cash and equivalents with fiscal agent are held by the Treasury and represent bond proceeds restricted for capital projects.

Derivative investments – The Measure J Building Fund did not directly enter into any derivative investments. Information regarding the amount invested in derivatives by the Treasury was not available.

Interest rate risk – Interest rate risk is the risk that changes in market interest rates will adversely affect the fair value of an investment. Generally, the longer the maturity of an investment, the greater the sensitivity of its fair value to changes in market interest rates. As of June 30, 2023, weighted average maturity of the investments contained in the Treasury is approximately 267 days.

Credit risk – Generally, credit risk is the risk that an issuer of an investment will not fulfill its obligation to the holder of the investment. This is measured by the assignment of a rating by a nationally recognized statistical rating organization. The Treasury investment pool does not have a rating provided by a nationally recognized statistical rating organization.

Custodial credit risk – Custodial credit risk for deposits is the risk that, in the event of the failure of a depository financial institution, a government will not be able to recover its deposits or will not be able to recover collateral securities that are in the possession of an outside party. The California Education Code and the District's investment policy do not contain legal or policy requirements that would limit the exposure to custodial credit risk for deposits other than the following provision for deposits: The California Government Code requires that a financial institution secure deposits that are made by state or local governmental units by pledging securities in an undivided collateral pool held by a depository regulated under state law (unless so waived by the governmental unit). The market value of the pledged securities in the collateral pool must equal at least 110% of the total amounts deposited by the public agencies.

**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE J BUILDING FUND**

**NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023**

4. INTERFUND TRANSACTIONS WITH OTHER DISTRICT FUNDS

Transfers to and from other District Funds are operating transfers from a fund receiving revenue to a fund through which the resources are being expended. The significant transfers to and from other District Funds were as follows for the year ended June 30, 2023:

Transfers in from other District Funds:

The District's County Schools State Schools Facilities Fund transferred \$8,783,224 to the Measure J Building Fund as reimbursement of state matching funds from the Office of Public School Construction.

5. COMMITMENTS AND CONTINGENCIES

The District is subject to legal proceedings and claims which arise in the ordinary course of business. In the opinion of management, the amount of the ultimate liability with respect to these actions will not materially affect the financial position or results of operations of the Measure J Building Fund.

As of June 30, 2023, the Measure J Building Fund has approximately \$1 million in outstanding commitments on ongoing construction contracts.

OTHER REPORT

**INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL
OVER FINANCIAL REPORTING AND ON COMPLIANCE AND
OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL
STATEMENTS PERFORMED IN ACCORDANCE WITH
*GOVERNMENT AUDITING STANDARDS***

**Independent Bond Citizens' Oversight Committee
and Board of Education
San Juan Unified School District
Carmichael, California**

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the Measure J Building Fund of the San Juan Unified School District (the District), which comprise the statement of financial position as of June 30, 2023, and the related notes to the financial statements, and have issued our report thereon dated April 15, 2024.

Report on Internal Control over Financial Reporting

In planning and performing our audit of the financial statements, we considered the District's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control. Accordingly, we do not express an opinion on the effectiveness of the District's internal control.

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

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

Independent Bond Citizens' Oversight Committee
and Board of Education
San Juan Unified School District
Page 2

Report on Compliance and Other Matters

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

Purpose of This Report

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

Gilbert CPAs

GILBERT CPAs
Sacramento, California

April 15, 2024

**SAN JUAN UNIFIED SCHOOL
DISTRICT PROPOSITION 39
AND MEASURE J GENERAL
OBLIGATION BONDS**

CARMICHAEL, CALIFORNIA

PERFORMANCE AUDIT

YEAR ENDED JUNE 30, 2023

**SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39
AND MEASURE J GENERAL OBLIGATION BONDS**

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INDEPENDENT AUDITOR'S REPORT

**Board of Education and Independent Citizens' Bond
Oversight Committee for Measure J
San Juan Unified School District
Carmichael, California**

We have conducted a performance audit of the San Juan Unified School District (the District) Measure J General Obligation Bonds for the year ended June 30, 2023.

We conducted our performance audit in accordance with *Government Auditing Standards* issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our conclusion based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for the findings and conclusions based on our audit objectives.

Our audit was limited to the objectives listed on page 2 of this report which includes determining compliance with the performance requirements for the Proposition 39 and Measure J General Obligation Bonds under the applicable provisions of Section 1(b)(3)(C) of Article XIII A of the California Constitution and Proposition 39 as they apply to the bonds and the net proceeds thereof. Management is responsible for the District's compliance with those requirements.

Solely to assist us in planning and performing our performance audit, we obtained an understanding of the internal controls of the District to determine if internal controls were adequate to help ensure the District's compliance with the requirements of Proposition 39, as specified by Section 1(b)(3)(C) of Article XIII A of the California Constitution. Accordingly, we do not express any assurance on the internal controls.

The results of our tests indicated that, in all significant respects, the San Juan Unified School District expended Measure J General Obligation Bond funds for the year ended June 30, 2023 only for the specific projects developed by the District's Board of Trustees and approved by the voters, in accordance with the requirements of Proposition 39, as specified by Section 1(b)(3)(C) of Article XIII A of the California Constitution.

Gilbert CPAs

**GILBERT CPAs
Sacramento, California**

April 15, 2024

SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39 AND MEASURE J GENERAL OBLIGATION BONDS

PERFORMANCE AUDIT JUNE 30, 2023

OBJECTIVES

The objectives of our performance audit were to document that the San Juan Unified School District (the District) expended Measure J General Obligation Bonds (the Bonds) funds for the year ended June 30, 2023 only for purposes approved by voters and only for specific projects developed by the District's Board of Trustees, in accordance with the requirements of Proposition 39, as specified by Section 1(b)(3)C of Article XIII A of the California Constitution; note any incongruities or system weaknesses; and provide recommendations for improvement.

SCOPE OF THE AUDIT

The scope of our performance audit covered the fiscal year ended June 30, 2023. Expenditures incurred after the issuance of the Bonds and prior to July 1, 2022, were covered in a previous examination. The expenditures included all account and project codes associated with the Bond projects. Expenditures incurred subsequent to June 30, 2023 were not reviewed or included within the scope of our audit.

BACKGROUND INFORMATION

On November 5, 2002, the electorate of the District approved the \$350 million Measure J general obligation bonds with greater than 55% of the votes in favor.

On July 31, 2003, the District issued General Obligation Bonds (Series 2003) in the amount of \$46,000,000 to build, acquire, construct and furnish school facilities. The bonds mature in 2028. The bonds were issued at interest rates ranging from 1.00% to 5.80%. With the issuance of the 2012 General Obligation Refunding Bonds in March 2012, \$24,705,000 of Series 2003 Bonds were refunded.

On August 12, 2004, the District issued General Obligation Bonds (Series 2004A Bonds) consisting of current interest bonds totaling \$67,205,000 and capital appreciation bonds totaling \$1,794,931 to build, acquire, construct, and furnish school facilities. The interest rates vary on the current interest bonds from 2.00% to 5.00% and mature through 2027. The capital appreciation bonds carry interest rates of 5.52% and 5.53% and mature in August 2028 and 2030. With the issuance of the 2012 General Obligation Refunding Bonds, Series C in September 2012, \$37,000,000 of Series 2004A Bonds were refunded.

On August 5, 2007, the District issued General Obligation Bonds (Series 2007 Bonds) in the amount of \$70,000,000 to build, acquire, construct and furnish school facilities. These bonds mature during 2016, and were issued at interest rates ranging from 4.25% to 5.00%. With the issuance of the 2014 General Obligation Refunding Bonds in May 2014, \$47,060,000 of Series 2007 Bonds were refunded.

On July 23, 2010, the District issued General Obligation Bonds (Series 2010 Bonds) in the amount of \$55,000,000 to build, acquire, construct and furnish school facilities. These bonds mature during succeeding years through August 2034, and were issued at interest rates ranging from 2.25% to 5.00%. With the issuance of the 2017 General Obligation Refunding Bond in March 2017, outstanding bonds matured during succeeding years through August 2020.

On June 10, 2011, the District issued General Obligation Bonds (Series 2011 Bonds) in the amount of \$10,600,000 to build, acquire, construct and furnish school facilities. These bonds mature during succeeding years through June 2026, and were issued at interest rates ranging from 0.80% to 5.50%.

SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39 AND MEASURE J GENERAL OBLIGATION BONDS

PERFORMANCE AUDIT JUNE 30, 2023

On March 22, 2012, the District issued General Obligation Refunding Series B Bonds (2012B Refunding Bonds) in the amount of \$23,190,000 to refund the District's Series 2003 bonds. The bonds mature during succeeding years through August 2028. The bonds were issued at interest rates ranging from 2.00 to 5.00%. On October 29, 2020, these bonds were refunded in part by the District's issuance of the 2020 General Obligation Refunding Bonds.

On September 13, 2012, the District issued General Obligation Refunding Series C Bonds (2012C Refunding Bonds) in the amount of \$36,480,000 to refund a portion of the District's Series 2004A Bonds. The bonds mature during succeeding years through August 2027. The bonds were issued at interest rates ranging from 2.00 to 5.00%. On October 29, 2020, these bonds were refunded in part by the District's issuance of the 2020 General Obligation Refunding Bonds.

On January 13, 2013, the District issued General Obligation Bonds (Series 2013 Bonds) in the amount of \$50,000,000 to build, acquire, construct and furnish school facilities. The bonds mature during succeeding years through August 2038. The bonds were issued at interest rates ranging from 3.00% to 5.00%. On October 29, 2020, these bonds were refunded in part by the District's issuance of the 2020 General Obligation Refunding Bonds.

On May 1, 2014, the District issued General Obligation Bonds (Series May 2014 Bonds) in the amount of \$44,265,000 to refund a portion of the District's outstanding Series 2007 Bonds. The bonds mature during succeeding years through August 2030. The bonds were issued at interest rates ranging from 2.00% to 5.00%. On October 29, 2020, these bonds were refunded in part by the District's issuance of the 2020 General Obligation Refunding Bonds.

On July 1, 2014, the District issued General Obligation Bonds (Series July 2014 Bonds) in the amount of \$25,925,000 to build, acquire, construct and furnish school facilities. The bonds mature during succeeding years through August 2032. The bonds were issued at interest rates ranging from 2.00% to 5.00%. On October 29, 2020, these bonds were refunded in part by the District's issuance of the 2020 General Obligation Refunding Bonds.

On March 1, 2017, the District issued General Obligation Bonds (Series 2017 Bonds) in the amount of \$23,475,000 to finance specific construction, acquisition and modernization projects. The bonds matured during succeeding years through August 2022. The bonds were issued at an interest rate ranging from 2.00% to 3.00%.

On March 1, 2017, the District issued General Obligation Refunding Series 2017 Bonds (2017 Refunding Bonds) in the amount of \$37,890,000 to refund a portion of the District's Series 2010 Bonds. The bonds mature during succeeding years through August 2026. The bonds were issued at interest rates ranging from 2.000% to 3.375%.

On October 29, 2020, the District issued 2020 General Obligation Refunding Bonds in the amount of \$143,090,000. The bonds range in maturity date with final payoff on August 1, 2034 and interest rates ranging from 0.265% - 2.416%. The bonds were issued by the District to refund approximately \$143,000,000 in callable maturities and on bonds outstanding in Refunding Series A and B, Refunding Series C, Series 2013, Series 2014 Refunding, and Series 2014. All series included in the refunding, with the exception of the Refunding Series A, were authorized pursuant to Measure J.

SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39 AND MEASURE J GENERAL OBLIGATION BONDS

PERFORMANCE AUDIT JUNE 30, 2023

As of June 30, 2023, total outstanding debt related to Measure J is \$41,774,932.

The financial activity related to the Measure J General Obligation Bonds is recorded in sub-Fund 23 (Measure J Building Fund) of Fund 21 (Building Fund) in the District's audited financial statements for the year ended June 30, 2023.

PROCEDURES PERFORMED

We obtained the Measure J Building Fund detailed general ledger for the fiscal year ended June 30, 2023. We obtained the actual invoices and other supporting documentation for a sample of expenditures to ensure compliance with Proposition 39 and Measure J General Obligation Bond funding. We performed the following procedures:

- We verified the mathematical accuracy of the expenditures included in the Measure J Building Fund detailed general ledger for the fiscal year ended June 30, 2023.
- Solely to assist us in planning and performing our performance audit, we obtained an understanding of the internal controls of the District to determine if internal controls are adequate to help ensure the District's compliance with the requirements of Proposition 39.
- We determined that the Independent Citizens' Bond Oversight Committee is fulfilling its duties as required by Education Code 15278 and as outlined in their Committee Bylaws.
- We selected a sample of 16 expenditures in the fiscal year ended June 30, 2023. The sample was selected to provide a representation across construction projects, vendors, and expenditure amounts. For each selection, we performed the following procedures:
 1. Reviewed supporting documentation to ensure that funds were properly expended on the specific projects outlined on the publicized list and met the requirements for bidding, if applicable.
 2. Verified the expenditure was for construction, rehabilitation, or replacement of school facilities, including furnishing and equipping of District facilities, deferred maintenance upgrades or the acquisition or lease of real property facilities and verified that funding was not used for salaries of school administrators or other operating expenditures of the District.

The District incurred expenditures of \$1,612,781 for the year ended June 30, 2023, for the Measure J projects listed in the following Schedule of Activities.

**SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39
AND MEASURE J GENERAL OBLIGATION BONDS**

**PERFORMANCE AUDIT
JUNE 30, 2023**

SCHEDULE OF ACTIVITIES

Description	June 30, 2023 Activities
Beginning Balance	\$ 4,350,996
Sources:	
Interest	215,773
Other local sources	762,740
Other Authorized Interfund Transfers In	8,783,224
	Total Sources
	<u>9,761,737</u>
Uses:	
Edison	Furniture 1,213,349
Kingswood	Furniture 225,176
Program	Program 63,245
Mariposa	Furniture 61,064
Coyle	Furniture 45,897
Casa	Stadium AV system 4,050
	Total Uses
	<u>1,612,781</u>
	Ending Balance
	<u>\$ 12,499,952</u>

**SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39
AND MEASURE J GENERAL OBLIGATION BONDS**

**PERFORMANCE AUDIT
JUNE 30, 2023**

CONCLUSION

Based upon the procedures performed, we found that, for the items tested, the San Juan Unified School District has properly accounted for the expenditures of the Measure J General Obligation Bonds. Further, it was noted that the funds were not used for salaries of school administrators or other operating expenditures. Our audit does not provide a legal determination on the District's compliance with specific requirements.

MANAGEMENT COMMENTS AND RECOMMENDATIONS

None.

**SAN JUAN UNIFIED SCHOOL
DISTRICT
MEASURE N BUILDING FUND
CARMICHAEL, CALIFORNIA**

**FINANCIAL STATEMENTS WITH
INDEPENDENT AUDITOR'S REPORTS**

YEAR ENDED JUNE 30, 2023

**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE N BUILDING FUND**

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JUNE 30, 2023**

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INDEPENDENT AUDITOR'S REPORT

**Independent Bond Citizens' Oversight Committee
and Board of Education
San Juan Unified School District
Carmichael, California**

Report on the Audit of the Financial Statements

Opinion

We have audited the accompanying financial statements of the Measure N Building Fund of the San Juan Unified School District (the District) as of and for the year ended June 30, 2023, and the related notes to the financial statements, as listed in the table of contents.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Measure N Building Fund of the District as of June 30, 2023, and the respective changes in financial position for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the District and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Emphasis of Matter

As discussed in Note 1, the financial statements present only the Measure N Building Fund and do not purport to and do not present fairly the financial position of the District as of June 30, 2023, or the changes in its financial position for the year then ended in conformity with accounting principles generally accepted in the United States of America. Our opinion is not modified with respect to this matter.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibilities for the Audit of the Financial Statements

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

In performing an audit in accordance with generally accepted auditing standards and *Government Auditing Standards*, we:

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

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

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated April 15, 2024, on our consideration of the District's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the District's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering District's internal control over financial reporting and compliance.

Gilbert CPAs

GILBERT CPAs
Sacramento, California

April 15, 2024

FINANCIAL STATEMENTS

**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE N BUILDING FUND**

**BALANCE SHEET
JUNE 30, 2023**

ASSETS:

Restricted cash and cash equivalents	\$ 14,432,454
Accounts receivable	<u>160,412</u>
Total assets	<u>\$ 14,592,866</u>

LIABILITIES AND FUND BALANCE:

Accounts payable	\$ 393,439
Fund balance - restricted	<u>14,199,427</u>
Total liabilities and fund balance	<u>\$ 14,592,866</u>

**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE N BUILDING FUND**

**STATEMENT OF REVENUES, EXPENDITURES, AND CHANGE IN FUND BALANCE
YEAR ENDED JUNE 30, 2023**

REVENUES:

Interest	\$ <u>593,931</u>
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EXPENDITURES:

Classified salaries	78,186
Employee benefits	23,686
Books and supplies	71,150
Contract services and other operating expenditures	35,744
Capital outlay	<u>4,725,134</u>
Total expenditures	<u>4,933,900</u>

Deficiency of revenues under expenditures	(4,339,969)
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OTHER FINANCING SOURCES:

Transfers in	<u>2,115,222</u>
Change in fund balance	(2,224,747)

RESTRICTED FUND BALANCE - BEGINNING OF YEAR	<u>16,424,174</u>
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RESTRICTED FUND BALANCE - END OF YEAR	<u>\$ 14,199,427</u>
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**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE N BUILDING FUND**

**NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023**

1. ORGANIZATION AND NATURE OF ACTIVITIES

The San Juan Unified School District (the District) was established in 1960 and serves a 75-square mile area covering the communities of Arden-Arcade, Carmichael, Citrus Heights, Fair Oaks, Gold River, and Orangevale. The District currently operates 65 schools and provides early learning, kindergarten through 12th grade, and adult program education to approximately 40,000 students.

These financial statements present only the Measure N General Obligation Bonds Building Fund, which is recorded in sub-Fund 24 (Measure N Building Fund) of Fund 21 (Building Fund) in the District's audited financial statements for the year ended June 30, 2023. These financial statements do not include financial data for the remainder of the District's funds and component unit, which accounting principles generally accepted in the United States of America require to be presented with the financial statements of the District.

On November 6, 2012, the electorate of the San Juan Unified School District approved the \$350 million Measure N general obligation bonds with greater than 55% of the votes in favor.

- On January 13, 2013, the District issued General Obligation Bonds Election of 2012, Series A (Series A Bonds) in the amount of \$20,000,000 to build, acquire, construct, and furnish school facilities. The bonds matured during succeeding years through August 2015. The bonds were issued at an interest rate of 1.00%.
- On July 1, 2014, the District issued General Obligation Bonds Election of 2012, Series B (Series B Bonds) in the amount of \$80,000,000 to build, acquire, construct, and furnish school facilities. The bonds mature during succeeding years through August 2027. The bonds were issued at interest rates ranging from 1.00% to 4.00%.
- On March 7, 2017, the District issued General Obligation Bonds Election of 2012, (Series 2017 Bonds) in the amount of \$70,000,000 to finance specific construction, acquisition, and modernization projects. The bonds mature during succeeding years through August 2028. The bonds were issued at interest rates ranging from 2.00% to 4.00%.
- On January 22, 2019, the District issued General Obligation Bonds Election of 2012, (Series 2019 Bonds) in the amount of \$150,000,000 to finance specific construction, acquisition, and modernization projects. The bonds mature during succeeding years through August 2031. The bonds were issued at interest rates ranging from 3.00% to 4.00%.
- On October 29, 2020, the District issued General Obligation Bonds, Election 2012, Series 2020 in the amount of \$30,000,000. The bonds range in maturity date with final payoff on August 1, 2029 and interest rates ranging from 0.25% - 4.00%.

As of June 30, 2023, total outstanding debt related to Measure N is \$177,505,000.

The Board of Supervisors of Sacramento County is empowered and obligated to annually levy *ad valorem* taxes, without limitation as to rate or amount, upon all property subject to taxation within the District (except for certain property which is taxable at limited rates), for payment of

SAN JUAN UNIFIED SCHOOL DISTRICT MEASURE N BUILDING FUND

NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023

interest and principal of the Bonds when due. The District has established separate debt service funds to account for the collection and remittance of bond principal and interest payments. Additional information on the bonds' payment schedules can be found in the District's financial statements.

2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Basis of presentation – The District accounts for its financial transactions in accordance with the policies and procedures of the California Department of Education's *California School Accounting Manual*. The accounting policies of the District conform to accounting principles generally accepted in the United States of America as prescribed by the Governmental Accounting Standards Board (GASB) and the American Institute of Certified Public Accountants (AICPA).

Measurement focus and basis of accounting – Measurement focus indicates the type of resources being measured, while the basis of accounting indicates the timing of transactions or events for recognition in the financial statements. The Measure N Building Fund is a governmental fund, and has been presented using the current financial resources measurement focus and the modified accrual basis of accounting. Revenues are recognized as soon as they are both measurable and available, and are considered to be available when they are collectible within the current period or soon enough thereafter to pay liabilities of the current period. For this purpose, the District considers revenues to be available if they are collected within 60 days of the end of the current fiscal period. Expenditures are generally recorded when the related liability is incurred.

Cash and cash equivalents – For the purpose of the financial statements, cash equivalents are defined as financial instruments with an original maturity of three months or less.

Restricted cash and cash equivalents – Cash that is externally restricted to purchase or construct capital or other assets is classified as a restricted asset in the balance sheet.

Restricted fund balance – Restricted fund balance includes resources which are legally or contractually restricted by external third parties. Fund balance is restricted for capital projects of the Measure N Building Fund in accordance with the project list for the 2012 General Obligation Bonds.

Estimates used in financial reporting – In preparing financial statements in conformity with accounting principles generally accepted in the United States of America, management is required to make estimates and assumptions that affect the reported amounts of assets and liabilities and the disclosure of contingent assets and liabilities at the date of the financial statements and revenues and expenditures during the reporting period. Actual results could differ from those estimates.

**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE N BUILDING FUND**

**NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023**

3. RESTRICTED CASH AND CASH EQUIVALENTS

Cash and equivalents as of June 30, 2023, consist of the following:

Cash and equivalents with County Treasury	\$ 4,134,140
Cash and equivalents with fiscal agent	<u>10,298,314</u>
Total cash and equivalents	<u>\$ 14,432,454</u>

Cash and equivalents in County Treasury – The Measure N Building Fund maintains cash in the Sacramento County Treasury (the Treasury). The Treasury pools funds with those of other districts in the county and invests the cash. The share of each fund in the pooled cash account is separately accounted for and interest earned is apportioned quarterly based on the relationship of a fund's daily balance to the total of pooled cash and investments.

Participants' equity in the Treasury investment pool is determined by the dollar amount of the participant deposits, adjusted for withdrawals and distributed income.

The Treasury is authorized to deposit cash and invest excess funds by California Government Code Section 53648 et seq. and is restricted by Government Code Section 53635, pursuant to Section 53601.

Cash and equivalents with fiscal agent – Cash and equivalents with fiscal agent are held by the Treasury and represent bond proceeds restricted for capital projects.

Derivative investments – The Measure N Building Fund did not directly enter into any derivative investments. Information regarding the amount invested in derivatives by the Treasury was not available.

Interest rate risk – Interest rate risk is the risk that changes in market interest rates will adversely affect the fair value of an investment. Generally, the longer the maturity of an investment, the greater the sensitivity of its fair value to changes in market interest rates. As of June 30, 2023, weighted average maturity of the investments contained in the Treasury is approximately 267 days.

Credit risk – Generally, credit risk is the risk that an issuer of an investment will not fulfill its obligation to the holder of the investment. This is measured by the assignment of a rating by a nationally recognized statistical rating organization. The Treasury investment pool does not have a rating provided by a nationally recognized statistical rating organization.

Custodial credit risk – Custodial credit risk for deposits is the risk that, in the event of the failure of a depository financial institution, a government will not be able to recover its deposits or will not be able to recover collateral securities that are in the possession of an outside party. The California Education Code and the District's investment policy do not contain legal or policy requirements that would limit the exposure to custodial credit risk for deposits other than the following provision for deposits: the California Government Code requires that a financial institution secure deposits that are made by state or local governmental units by pledging securities in an undivided collateral pool held by a depository regulated under state law (unless so waived by the governmental unit). The market value of the pledged securities in the collateral pool must equal at least 110% of the total amounts deposited by the public agencies.

**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE N BUILDING FUND**

**NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023**

4. INTERFUND TRANSACTIONS WITH OTHER DISTRICT FUNDS

Transfers to and from other District Funds are operating transfers from a fund receiving revenue to a fund through which the resources are being expended. Transfers in from other District Funds were as follows for the year ended June 30, 2023:

The District's County State Schools Facilities Fund transferred \$2,115,222 to the Measure N Building Fund as reimbursement of state matching funds from the Office of Public School Construction.

5. COMMITMENTS AND CONTINGENCIES

The District is subject to legal proceedings and claims which arise in the ordinary course of business. In the opinion of management, the amount of the ultimate liability with respect to these actions will not materially affect the financial position or results of operations of the Measure N Building Fund.

As of June 30, 2023, the Measure N Building Fund has approximately \$3 million in outstanding commitments on ongoing construction contracts.

OTHER REPORT

**INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL
OVER FINANCIAL REPORTING AND ON COMPLIANCE AND
OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL
STATEMENTS PERFORMED IN ACCORDANCE WITH
*GOVERNMENT AUDITING STANDARDS***

**Independent Bond Citizens' Oversight Committee
and Board of Education
San Juan Unified School District
Carmichael, California**

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the Measure N Building Fund of the San Juan Unified School District (the District), which comprise the statement of financial position as of June 30, 2023, and the related notes to the financial statements, and have issued our report thereon dated April 15, 2024.

Report on Internal Control over Financial Reporting

In planning and performing our audit of the financial statements, we considered the District's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control. Accordingly, we do not express an opinion on the effectiveness of the District's internal control.

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

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

Report on Compliance and Other Matters

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

Purpose of This Report

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

Gilbert CPAs

GILBERT CPAs
Sacramento, California

April 15, 2024

**SAN JUAN UNIFIED SCHOOL
DISTRICT PROPOSITION 39
AND MEASURE N GENERAL
OBLIGATION BONDS**

CARMICHAEL, CALIFORNIA

PERFORMANCE AUDIT

YEAR ENDED JUNE 30, 2023

**SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39
AND MEASURE N GENERAL OBLIGATION BONDS**

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INDEPENDENT AUDITOR'S REPORT

**Board of Education and Independent Citizens' Bond
Oversight Committee for Measure N
San Juan Unified School District
Carmichael, California**

We have conducted a performance audit of the San Juan Unified School District (the District) Measure N General Obligation Bonds for the year ended June 30, 2023.

We conducted our performance audit in accordance with *Government Auditing Standards* issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our conclusion based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for the findings and conclusions based on our audit objectives.

Our audit was limited to the objectives listed on page 2 of this report which includes determining compliance with the performance requirements for the Proposition 39 and Measure N General Obligation Bonds under the applicable provisions of Section 1(b)(3)(C) of Article XIII A of the California Constitution and Proposition 39 as they apply to the bonds and the net proceeds thereof. Management is responsible for the District's compliance with those requirements.

Solely to assist us in planning and performing our performance audit, we obtained an understanding of the internal controls of the District to determine if internal controls were adequate to help ensure the District's compliance with the requirements of Proposition 39, as specified by Section 1(b)(3)(C) of Article XIII A of the California Constitution. Accordingly, we do not express any assurance on the internal controls.

The results of our tests indicated that, in all significant respects, the San Juan Unified School District expended Measure N General Obligation Bond funds for the year ended June 30, 2023 only for the specific projects developed by the District's Board of Trustees and approved by the voters, in accordance with the requirements of Proposition 39, as specified by Section 1(b)(3)(C) of Article XIII A of the California Constitution.

Gilbert CPAs

**GILBERT CPAs
Sacramento, California**

April 15, 2024

SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39 AND MEASURE N GENERAL OBLIGATION BONDS

PERFORMANCE AUDIT JUNE 30, 2023

OBJECTIVES

The objectives of our performance audit were to document that the San Juan Unified School District (the District) expended Measure N General Obligation Bonds (the Bonds) funds for the year ended June 30, 2023 only for purposes approved by voters and only for specific projects developed by the District's Board of Trustees, in accordance with the requirements of Proposition 39, as specified by Section 1(b)(3)C of Article XIII A of the California Constitution; note any incongruities or system weaknesses; and provide recommendations for improvements.

SCOPE OF THE AUDIT

The scope of our performance audit covered the fiscal year ended June 30, 2023. Expenditures incurred after the issuance of the Bonds and prior to July 1, 2022, were covered in a previous examination. The expenditures included all account and project codes associated with the Bond projects. Expenditures incurred subsequent to June 30, 2023 were not reviewed or included within the scope of our audit.

BACKGROUND INFORMATION

On November 6, 2012, the electorate of the San Juan Unified School District approved the \$350 million Measure N general obligation bonds with greater than 55% of the votes in favor.

On January 13, 2013, the District issued General Obligation Bonds Election of 2012, Series A (Series A Bonds) in the amount of \$20,000,000 to build, acquire, construct, and furnish school facilities. The bonds matured during succeeding years through August 2015. The bonds were issued at an interest rate of 1.00%.

On July 1, 2014, the District issued General Obligation Bonds Election of 2012, Series B (Series B Bonds) in the amount of \$80,000,000 to build, acquire, construct, and furnish school facilities. The bonds mature during succeeding years through August 2027. The bonds were issued at interest rates ranging from 1.00% to 4.00%.

On March 7, 2017, the District issued General Obligation Bonds Election of 2012, (Series 2017 Bonds) in the amount of \$70,000,000 to finance specific construction, acquisition, and modernization projects. The bonds mature during succeeding years through August 2028. The bonds were issued at interest rates ranging from 2.00% to 4.00%.

On January 22, 2019, the District issued General Obligation Bonds Election of 2012, (Series 2019 Bonds) in the amount of \$150,000,000 to finance specific construction, acquisition, and modernization projects. The bonds mature during succeeding years through August 2031. The bonds were issued at interest rates ranging from 3.00% to 4.00%.

On October 29, 2020, the District issued General Obligation Bonds, Election 2012, Series 2020 in the amount of \$30,000,000. The bonds range in maturity date with final payoff on August 1, 2029 and interest rates ranging from 0.25% - 4.00%.

As of June 30, 2023, total outstanding debt related to Measure N is \$177,505,000.

SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39 AND MEASURE N GENERAL OBLIGATION BONDS

PERFORMANCE AUDIT JUNE 30, 2023

The financial activity related to the Measure N General Obligation Bonds is recorded in sub-Fund 24 (Measure N Building Fund) of Fund 21 (Building Fund) in the District's audited financial statements for the year ended June 30, 2023.

PROCEDURES PERFORMED

We obtained the Measure N Building Fund detailed general ledger for the fiscal year ended June 30, 2023. We obtained the actual invoices and other supporting documentation for a sample of expenditures to ensure compliance with Proposition 39 and Measure N General Obligation Bond funding. We performed the following procedures:

- We verified the mathematical accuracy of the expenditures included in the Measure N Building Fund detailed general ledger for the fiscal year ended June 30, 2023.
- Solely to assist us in planning and performing our performance audit, we obtained an understanding of the internal controls of the District to determine if internal controls are adequate to help ensure the District's compliance with the requirements of Proposition 39.
- We determined that the Independent Citizens' Bond Oversight Committee is fulfilling its duties as required by Education Code 15278 and as outlined in their Committee Bylaws.
- We selected a sample of 18 expenditures in the fiscal year ended June 30, 2023. The sample was selected to provide a representation across construction projects, vendors, and expenditure amounts. For each selection, we performed the following procedures:
 1. Reviewed supporting documentation to ensure that funds were properly expended on the specific projects outlined on the publicized list and met the requirements for bidding, if applicable.
 2. Verified the expenditure was for construction, rehabilitation, or replacement of school facilities, including furnishing and equipping of District facilities, deferred maintenance upgrades or the acquisition or lease of real property facilities and verified that funding was not used for salaries of school administrators or other operating expenditures of the District.

The District incurred total expenditures of \$4,933,900 through June 30, 2023, for the Measure N projects listed in the following Schedule of Activities.

**SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39
AND MEASURE N GENERAL OBLIGATION BONDS**

**PERFORMANCE AUDIT
JUNE 30, 2023**

SCHEDULE OF ACTIVITIES

Description	Prior Activities	June 30, 2023 Activities	Total
Sources:			
Issuance Fund 24 N	\$ 350,000,000		\$ 350,000,000
Interest Revenue	4,948,783	\$ 593,931	5,542,714
Premium Revenue	3,822,768		3,822,768
E-Rate Reimbursement	417,098		417,098
Other Revenue	2,521,278		2,521,278
Other Authorized Interfund Transfers In	<u>16,315,619</u>	<u>2,115,222</u>	<u>18,430,841</u>
Total Sources	<u>378,025,546</u>	<u>2,709,153</u>	<u>380,734,699</u>
Uses:			
Dyer Kelly New Construction	47,236,440		47,236,440
Greer Full Site Renovation	40,655,084		40,655,084
Del Campo New Construction	35,366,903		35,366,903
Mira Loma New Construction	28,761,897		28,761,897
Casa Roble New Construction	24,323,971		24,323,971
El Camino New Construction	16,783,170		16,783,170
Citrus Heights New Construction	14,699,015		14,699,015
Rio New Construction	13,419,102		13,419,102
Measure N Program	11,027,897	124,870	11,152,767
Multi Site Tech Service	10,984,360		10,984,360
Encina Outdoor Learning	10,231,619		10,231,619
Mira Loma Outdoor Learning	9,218,725		9,218,725
Citrus Heights MOD	8,863,522		8,863,522
Bella Vista MOD	8,680,507		8,680,507
Bella Vista New Construction	8,172,373		8,172,373
Casa Outdoor Learning	7,803,796		7,803,796
Del Campo MOD	6,306,294		6,306,294
Debt Services	5,454,036		5,454,036
Salk (Edison) New Construction	5,171,776		5,171,776
Encina HVAC (gym)	5,027,720		5,027,720
Cowan New Construction	3,541,996		3,541,996
Del Campo Outdoor Learning	3,392,382		3,392,382
Multi Site Energy Efficient	3,219,604		3,219,604
Rio Full Site Furniture		3,150,199	3,150,199
El Camino Outdoor Learning	2,996,067		2,996,067
Mariemont New Construction	2,577,221		2,577,221
Del Campo MOD (CTE Fire)	2,511,878		2,511,878
Casa Roble MOD CTE	2,504,096		2,504,096
Del Campo MOD (CTE Broadcasting)	1,896,588		1,896,588
Exterior Lighting Retrofit Energy Efficiency	1,304,383		1,304,383

**SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39
AND MEASURE N GENERAL OBLIGATION BONDS**

**PERFORMANCE AUDIT
JUNE 30, 2023**

Description	Prior Activities	June 30, 2023 Activities	Total
Rio Outdoor Learning	1,274,405		1,274,405
Bella Vista New Construction (housing)	1,094,601		1,094,601
Mission DM (Roofing)	989,222		989,222
El Camino Student Safety	942,111		942,111
Lichen DM (Roofing)	937,800		937,800
Sierra Oaks DM (Roofing)	937,008		937,008
Underwriters' Discount & Other COI	930,784		930,784
Gold River Full Site Furniture	611,672	239,190	850,862
Skycrest DM	812,540		812,540
Grand Oaks Full Site Furniture	765,467	35,767	801,234
Cowan DM (Roofing)	760,681		760,681
Green Oaks DM (Roofing)	714,195		714,195
Cameron Ranch DM	612,340		612,340
Garfield MOD	577,251		577,251
Cost of Issuance	572,535		572,535
Grand Oaks Student Safety	553,705		553,705
Arlington Full Site Furniture	464,191	65,051	529,242
Mission Student Safety	455,968		455,968
Ralph Richardson Student Safety	403,371		403,371
Mira Loma Student Safety	374,278		374,278
Starr King Student Safety	373,850		373,850
District Router Upgrade Tech Service	368,714		368,714
TK Classroom Furniture (phase 2)		350,081	350,081
TK Classroom Furniture (phase 1)	17,186	331,126	348,312
Rio PoC Wap Tech Service	327,803		327,803
Fiscal Furniture Replacement		325,392	325,392
Salk (Edison) Student Safety	323,362		323,362
Thomas Kelly Student Safety	292,274		292,274
Gold River Student Safety	287,287		287,287
Bella Vista New Construction (Butler)	250,314		250,314
District Office MOD (HR office)	249,446		249,446
Holst (La Vista) Student Safety	246,829		246,829
Woodside Student Safety	241,328		241,328
Trajan Playground Student Safety	219,800		219,800
Mariemont Infrastructure	201,783		201,783
Greer MOD	199,657		199,657
Trajan Infrastructure	198,653		198,653
Dewey Infrastructure	186,196		186,196
Skycrest Student Safety	131,441		131,441

**SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39
AND MEASURE N GENERAL OBLIGATION BONDS**

**PERFORMANCE AUDIT
JUNE 30, 2023**

Description	Prior Activities	June 30, 2023 Activities	Total
Coyle Student Safety	119,392		119,392
Business Services Furniture Replacement		116,850	116,850
Casa Infrastructure	113,148		113,148
Del Campo Full Site Furniture		102,858	102,858
La Entrada	99,565		99,565
Del Dayo Outdoor Learning	65,924		65,924
Sylvan MOD	52,468		52,468
Casa MOD	44,900		44,900
Dyer Kelly MOD	34,810		34,810
Cowan Furniture (office)		28,302	28,302
Grand Oaks Infrastructure	27,308		27,308
Dewey Furniture (office)		24,223	24,223
MP Tables (Mariposa)		24,115	24,115
Pastuer Furniture (MP)		15,876	15,876
Cameron Ranch Infrastructure	11,387		11,387
Total Uses	<u>361,601,372</u>	<u>4,933,900</u>	<u>366,535,272</u>
Ending Balance	\$ 16,424,174	\$ (2,224,747)	\$ 14,199,427

**SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39
AND MEASURE N GENERAL OBLIGATION BONDS**

**PERFORMANCE AUDIT
JUNE 30, 2023**

CONCLUSION

Based upon the procedures performed, we found that, for the items tested, the San Juan Unified School District has properly accounted for the expenditures of the Measure N General Obligation Bonds. Further, it was noted that the funds were not used for salaries of school administrators or other operating expenditures. Our audit does not provide a legal determination on the District's compliance with specific requirements.

MANAGEMENT COMMENTS AND RECOMMENDATIONS

None.

**SAN JUAN UNIFIED SCHOOL
DISTRICT
MEASURE P BUILDING FUND
CARMICHAEL, CALIFORNIA**

**FINANCIAL STATEMENTS WITH
INDEPENDENT AUDITOR'S REPORTS**

YEAR ENDED JUNE 30, 2023

**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE P BUILDING FUND**

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INDEPENDENT AUDITOR'S REPORT

**Independent Bond Citizens' Oversight Committee
and Board of Education
San Juan Unified School District
Carmichael, California**

Report on the Audit of the Financial Statements

Opinion

We have audited the accompanying financial statements of the Measure P Building Fund of the San Juan Unified School District (the District) as of and for the year ended June 30, 2023, and the related notes to the financial statements, as listed in the table of contents.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Measure P Building Fund of the District as of June 30, 2023, and the respective changes in financial position for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the District and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Emphasis of Matter

As discussed in Note 1, the financial statements present only the Measure P Building Fund and do not purport to and do not present fairly the financial position of the District as of June 30, 2023, or the changes in its financial position for the year then ended in conformity with accounting principles generally accepted in the United States of America. Our opinion is not modified with respect to this matter.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibilities for the Audit of the Financial Statements

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

In performing an audit in accordance with generally accepted auditing standards and *Government Auditing Standards*, we:

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

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

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated April 15, 2024, on our consideration of the District's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the District's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering District's internal control over financial reporting and compliance.

Gilbert CPAs

GILBERT CPAs
Sacramento, California

April 15, 2024

FINANCIAL STATEMENTS

**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE P BUILDING FUND**

**BALANCE SHEET
JUNE 30, 2023**

ASSETS:

Restricted cash and cash equivalents	\$ 110,518,260
Accounts receivable	<u>634,306</u>
Total assets	<u><u>\$ 111,152,566</u></u>

LIABILITIES AND FUND BALANCE:

Accounts payable	\$ 16,068,323
Fund balance - restricted	<u>95,084,243</u>
Total liabilities and fund balance	<u><u>\$ 111,152,566</u></u>

**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE P BUILDING FUND**

**STATEMENT OF REVENUES, EXPENDITURES, AND CHANGE IN FUND BALANCE
YEAR ENDED JUNE 30, 2023**

REVENUES:

Interest	\$ 4,887,764
Other local sources	<u>40,640</u>
Total revenues	<u>4,928,404</u>

EXPENDITURES:

Classified salaries	999,963
Employee benefits	491,257
Books and supplies	50,012
Contract services and other operating expenditures	702,973
Capital outlay	<u>116,922,370</u>
Total expenditures	<u>119,166,575</u>
Deficiency of revenues under expenditures	(114,238,171)

OTHER FINANCING SOURCES:

Transfers in	8,781,931
Other financing sources	<u>18,999</u>
Total other financing sources	<u>8,800,930</u>
Change in fund balance	(105,437,241)

RESTRICTED FUND BALANCE - BEGINNING OF YEAR

200,521,484

RESTRICTED FUND BALANCE - END OF YEAR

\$ 95,084,243

**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE P BUILDING FUND**

**NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023**

1. ORGANIZATION AND NATURE OF ACTIVITIES

The San Juan Unified School District (the District) was established in 1960 and serves a 75-square mile area covering the communities of Arden-Arcade, Carmichael, Citrus Heights, Fair Oaks, Gold River, and Orangevale. The District currently operates 65 schools and provides early learning, kindergarten through 12th grade, and adult program education to approximately 40,000 students.

These financial statements present only the Measure P General Obligation Bonds Building Fund, which is recorded in sub-Fund 26 (Measure P Building Fund) of Fund 21 (Building Fund) in the District's audited financial statements for the year ended June 30, 2023. These financial statements do not include financial data for the remainder of the District's funds and component unit, which accounting principles generally accepted in the United States of America require to be presented with the financial statements of the District.

On November 8, 2016, the electorate of the San Juan Unified School District approved the \$750 million Measure P general obligation bonds with greater than 55% of the votes in favor.

- On March 7, 2017, the District issued General Obligation Bonds Election of 2016 (Series 2017 Bonds) in the amount of \$39,920,000 to finance specific construction, acquisition, and modernization projects. These bonds matured during succeeding years through August 2019, and were issued at interest rates ranging from 2.00% to 2.50%.
- On January 22, 2019, the District issued General Obligation Bonds of Election 2016 (Series 2019 Bonds) in the amount of \$80,000,000 to finance specific construction, acquisition, and modernization projects. These bonds mature during succeeding years through August 2029 and were issued at 4.00% interest rate.
- On October 29, 2020, the District issued General Obligation Bonds, Election 2016, Series 2020 in the amount of \$150,000,000. The bonds range in maturity date with final payoff on August 1, 2041 and interest rates ranging from 0.25% - 4.00%.
- On April 21, 2022, the District issued General Obligation Bonds, Election 2016, Series 2022 in the amount of \$150,000,000. The bonds range in maturity date with final payoff of August 1, 2046 and interest rates ranging from 2.18% to 5.00%.

As of June 30, 2023, total outstanding debt related to Measure P is \$301,110,000.

The Board of Supervisors of Sacramento County is empowered and obligated to annually levy *ad valorem* taxes, without limitation as to rate or amount, upon all property subject to taxation within the District (except for certain property which is taxable at limited rates), for payment of interest and principal of the Bonds when due. The District has established separate debt service funds to account for the collection and remittance of bond principal and interest payments. Additional information on the bonds' payment schedules can be found in the District's financial statements.

SAN JUAN UNIFIED SCHOOL DISTRICT MEASURE P BUILDING FUND

NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023

2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Basis of presentation – The District accounts for its financial transactions in accordance with the policies and procedures of the California Department of Education's *California School Accounting Manual*. The accounting policies of the District conform to accounting principles generally accepted in the United States of America as prescribed by the Governmental Accounting Standards Board (GASB) and the American Institute of Certified Public Accountants (AICPA).

Measurement focus and basis of accounting – Measurement focus indicates the type of resources being measured, while the basis of accounting indicates the timing of transactions or events for recognition in the financial statements. The Measure P Building Fund is a governmental fund, and has been presented using the current financial resources measurement focus and the modified accrual basis of accounting. Revenues are recognized as soon as they are both measurable and available, and are considered to be available when they are collectible within the current period or soon enough thereafter to pay liabilities of the current period. For this purpose, the District considers revenues to be available if they are collected within 60 days of the end of the current fiscal period. Expenditures are generally recorded when the related liability is incurred.

Cash and cash equivalents – For the purpose of the financial statements, cash equivalents are defined as financial instruments with an original maturity of three months or less.

Restricted cash and cash equivalents – Cash that is externally restricted to purchase or construct capital or other assets is classified as a restricted asset in the balance sheet.

Restricted fund balance – Restricted fund balance includes resources which are legally or contractually restricted by external third parties. Fund balance is restricted for capital projects of the Measure P Building Fund in accordance with the project list for the 2016 General Obligation Bonds.

Estimates used in financial reporting – In preparing financial statements in conformity with accounting principles generally accepted in the United States of America, management is required to make estimates and assumptions that affect the reported amounts of assets and liabilities and the disclosure of contingent assets and liabilities at the date of the financial statements and revenues and expenditures during the reporting period. Actual results could differ from those estimates.

3. RESTRICTED CASH AND CASH EQUIVALENTS

Cash and equivalents as of June 30, 2023, consist of the following:

Cash and equivalents with County Treasury	\$ 6,802,655
Cash and equivalents with fiscal agent	<u>103,715,605</u>
Total cash and equivalents	<u>\$ 110,518,260</u>

SAN JUAN UNIFIED SCHOOL DISTRICT MEASURE P BUILDING FUND

NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023

Cash and equivalents in County Treasury – The Measure P Building Fund maintains cash in the Sacramento County Treasury (the Treasury). The Treasury pools funds with those of other districts in the county and invests the cash. The share of each fund in the pooled cash account is separately accounted for and interest earned is apportioned quarterly based on the relationship of a fund's daily balance to the total of pooled cash and investments.

Participants' equity in the Treasury investment pool is determined by the dollar amount of the participant deposits, adjusted for withdrawals and distributed income.

The Treasury is authorized to deposit cash and invest excess funds by California Government Code Section 53648 et seq. and is restricted by Government Code Section 53635, pursuant to Section 53601.

Cash and equivalents with fiscal agent – Cash and equivalents with fiscal agent are held by the Treasury and represent bond proceeds restricted for capital projects.

Derivative investments – The Measure P Building Fund did not directly enter into any derivative investments. Information regarding the amount invested in derivatives by the Treasury was not available.

Interest rate risk – Interest rate risk is the risk that changes in market interest rates will adversely affect the fair value of an investment. Generally, the longer the maturity of an investment, the greater the sensitivity of its fair value to changes in market interest rates. As of June 30, 2023, weighted average maturity of the investments contained in the Treasury is approximately 267 days.

Credit risk – Generally, credit risk is the risk that an issuer of an investment will not fulfill its obligation to the holder of the investment. This is measured by the assignment of a rating by a nationally recognized statistical rating organization. The Treasury investment pool does not have a rating provided by a nationally recognized statistical rating organization.

Custodial credit risk – Custodial credit risk for deposits is the risk that, in the event of the failure of a depository financial institution, a government will not be able to recover its deposits or will not be able to recover collateral securities that are in the possession of an outside party. The California Education Code and the District's investment policy do not contain legal or policy requirements that would limit the exposure to custodial credit risk for deposits other than the following provision for deposits: the California Government Code requires that a financial institution secure deposits that are made by state or local governmental units by pledging securities in an undivided collateral pool held by a depository regulated under state law (unless so waived by the governmental unit). The market value of the pledged securities in the collateral pool must equal at least 110% of the total amounts deposited by the public agencies.

4. INTERFUND TRANSACTIONS WITH OTHER DISTRICT FUNDS

Transfers to and from other District Funds are operating transfers from a fund receiving revenue to a fund through which the resources are being expended. Transfers in from other District Funds were as follows for the year ended June 30, 2023:

The District's General Fund transferred \$5,000,000 to the Measure P Building Fund for Arcade Fundamental Middle School Construction project.

**SAN JUAN UNIFIED SCHOOL DISTRICT
MEASURE P BUILDING FUND**

**NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023**

The District's County State Schools Facilities Fund transferred \$3,781,931 to the Measure P Building Fund as reimbursement of state matching funds from the Office of Public School Construction.

5. COMMITMENTS AND CONTINGENCIES

The District is subject to legal proceedings and claims which arise in the ordinary course of business. In the opinion of management, the amount of the ultimate liability with respect to these actions will not materially affect the financial position or results of operations of the Measure P Building Fund.

As of June 30, 2023, the Measure P Building Fund has approximately \$172.6 million in outstanding commitments and construction contracts.

OTHER REPORT

INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH *GOVERNMENT AUDITING STANDARDS*

**Independent Bond Citizens' Oversight Committee
and Board of Education
San Juan Unified School District
Carmichael, California**

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the Measure P Building Fund of the San Juan Unified School District (the District), which comprise the statement of financial position as of June 30, 2023, and the related notes to the financial statements, and have issued our report thereon dated April 15, 2024.

Report on Internal Control over Financial Reporting

In planning and performing our audit of the financial statements, we considered the District's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control. Accordingly, we do not express an opinion on the effectiveness of the District's internal control.

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

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

Report on Compliance and Other Matters

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

Purpose of This Report

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

Gilbert CPAs

GILBERT CPAs
Sacramento, California

April 15, 2024

**SAN JUAN UNIFIED SCHOOL
DISTRICT PROPOSITION 39
AND MEASURE P GENERAL
OBLIGATION BONDS**

CARMICHAEL, CALIFORNIA

PERFORMANCE AUDIT

YEAR ENDED JUNE 30, 2023

**SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39
AND MEASURE P GENERAL OBLIGATION BONDS**

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INDEPENDENT AUDITOR'S REPORT

**Board of Education and Independent Citizens' Bond
Oversight Committee for Measure P
San Juan Unified School District
Carmichael, California**

We have conducted a performance audit of the San Juan Unified School District (the District) Measure P General Obligation Bonds for the year ended June 30, 2023.

We conducted our performance audit in accordance with *Government Auditing Standards* issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our conclusion based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for the findings and conclusions based on our audit objectives.

Our audit was limited to the objectives listed on page 2 of this report which includes determining compliance with the performance requirements for the Proposition 39 and Measure P General Obligation Bonds under the applicable provisions of Section 1(b)(3)(C) of Article XIII A of the California Constitution and Proposition 39 as they apply to the bonds and the net proceeds thereof. Management is responsible for the District's compliance with those requirements.

Solely to assist us in planning and performing our performance audit, we obtained an understanding of the internal controls of the District to determine if internal controls were adequate to help ensure the District's compliance with the requirements of Proposition 39, as specified by Section 1(b)(3)(C) of Article XIII A of the California Constitution. Accordingly, we do not express any assurance on the internal controls.

The results of our tests indicated that, in all significant respects, the San Juan Unified School District expended Measure P General Obligation Bond funds for the year ended June 30, 2023 only for the specific projects developed by the District's Board of Trustees and approved by the voters, in accordance with the requirements of Proposition 39, as specified by Section 1(b)(3)(C) of Article XIII A of the California Constitution.

Gilbert CPAs

**GILBERT CPAs
Sacramento, California**

April 15, 2024

SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39 AND MEASURE P GENERAL OBLIGATION BONDS

PERFORMANCE AUDIT JUNE 30, 2023

OBJECTIVES

The objectives of our performance audit were to document that the San Juan Unified School District (the District) expended Measure P General Obligation Bonds (the Bonds) funds for the year ended June 30, 2023 only for purposes approved by voters and only for specific projects developed by the District's Board of Trustees, in accordance with the requirements of Proposition 39, as specified by Section 1(b)(3)C of Article XIII A of the California Constitution; note any incongruities or system weaknesses; and provide recommendations for improvements.

SCOPE OF THE AUDIT

The scope of our performance audit covered the fiscal year ended June 30, 2023. Expenditures incurred after the issuance of the Bonds and prior to July 1, 2022, were covered in a previous examination. The expenditures included all account and project codes associated with the Bond projects. Expenditures incurred subsequent to June 30, 2023 were not reviewed or included within the scope of our audit.

BACKGROUND INFORMATION

On November 8, 2016, the electorate of the San Juan Unified School District approved the \$750 million Measure P general obligation bonds with greater than 55% of the votes in favor.

On March 7, 2017, the District issued General Obligation Bonds Election of 2016 (Series 2017 Bonds) in the amount of \$39,920,000 to finance specific construction, acquisition, and modernization projects. These bonds matured during succeeding years through August 2019 and were issued at interest rates ranging from 2.00% to 2.50%.

On January 22, 2019, the District issued General Obligation Bonds of Election 2016 (Series 2019 Bonds) in the amount of \$80,000,000 to finance specific construction, acquisition, and modernization projects. These bonds mature during succeeding years through August 2029 and were issued at 4.00% interest rate.

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On April 21, 2022, the District issued General Obligation Bonds, Election 2016, Series 2022 in the amount of \$150,000,000. The bonds range in maturity date with final payoff of August 1, 2046 and interest rates ranging from 2.18% to 5.00%.

As of June 30, 2023, total outstanding debt related to Measure P is \$301,110,000.

The financial activity related to the Measure P General Obligation Bonds is recorded in sub-Fund 26 (Measure P Building Fund) of Fund 21 (Building Fund) in the District's audited financial statements for the year ended June 30, 2023.

SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39 AND MEASURE P GENERAL OBLIGATION BONDS

PERFORMANCE AUDIT JUNE 30, 2023

PROCEDURES PERFORMED

We obtained the Measure P Building Fund detailed general ledger for the fiscal year ended June 30, 2023. We obtained the actual invoices and other supporting documentation for a sample of expenditures to ensure compliance with Proposition 39 and Measure P General Obligation Bond funding. We performed the following procedures:

- We verified the mathematical accuracy of the expenditures included in the Measure P Building Fund detailed general ledger for the fiscal year ended June 30, 2023.
- Solely to assist us in planning and performing our performance audit, we obtained an understanding of the internal controls of the District to determine if internal controls are adequate to help ensure the District's compliance with the requirements of Proposition 39.
- We determined that the Independent Citizens' Bond Oversight Committee is fulfilling its duties as required by Education Code 15278 and as outlined in their Committee Bylaws.
- We selected a sample of 47 expenditures in the fiscal year ended June 30, 2023. The sample was selected to provide a representation across construction projects, vendors and expenditure amounts. For each selection, we performed the following procedures:
 1. Reviewed supporting documentation to ensure that funds were properly expended on the specific projects outlined on the publicized list and met the requirements for bidding, if applicable.
 2. Verified the expenditure was for construction, rehabilitation, or replacement of school facilities, including furnishing and equipping of District facilities, deferred maintenance upgrades or the acquisition or lease of real property facilities and verified that funding was not used for salaries of school administrators or other operating expenditures of the District.

The District incurred total expenditures of \$119,166,575 through June 30, 2023, for the Measure P projects listed in the following Schedule of Activities.

**SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39
AND MEASURE P GENERAL OBLIGATION BONDS**

**PERFORMANCE AUDIT
JUNE 30, 2023**

SCHEDULE OF ACTIVITIES

Description	Prior Activities	June 30, 2023 Activities	Total
Sources:			
Issuance Fund 26 P	\$ 419,920,000		\$ 419,920,000
Interest Revenue	3,748,565	\$ 4,887,764	8,636,329
Premium Revenue	2,237,472		2,237,472
Other Revenue	2,794,173	18,999	2,813,172
Other Revenue for Projects	1,296,297	40,640	1,336,937
Other Authorized Transfers In	<u>15,018,553</u>	<u>8,781,931</u>	<u>23,800,484</u>
Total Sources	<u>445,015,060</u>	<u>13,729,334</u>	<u>458,744,394</u>
Uses:			
Arden New Construction	64,399,550	2,126,006	66,525,556
Del Paso Manor Full Site Renovation	44,531,501	78,035	44,609,536
Barrett New Construction	25,134,111	2,621,721	27,755,832
Barrett MOD	19,063,070	8,443,813	27,506,883
Mesa Verde Outdoor Learning	1,244,709	19,065,214	20,309,923
Le Gette New Construction	2,884,101	14,790,207	17,674,308
Arcade New Construction	574,269	14,711,523	15,285,792
Winterstein MOD	12,636,405		12,636,405
K. Johnson New Construction	669,147	11,586,433	12,255,580
Littlejohn MOD	9,894,814		9,894,814
Bella Vista Outdoor Learning	9,833,675		9,833,675
Rio Americano Outdoor Learning	9,672,328		9,672,328
Measure P Program	6,787,146	2,073,851	8,860,997
Le Gette MOD	915,842	5,744,718	6,660,560
Starr King New Construction	3,027,140	2,439,220	5,466,360
San Juan HVAC (gym)	4,243,352		4,243,352
Mira Loma HVAC (gym)	4,072,298		4,072,298
Cottage New Construction	3,825,857		3,825,857
Mira Loma Outdoor Learning (Tennis Court)	228,996	3,550,694	3,779,690
Rio MOD (CTE)	745,062	2,625,466	3,370,528
Will Rogers DM (paint, floors, Furniture)	940,764	2,267,635	3,208,399
Howe Ave DM (floor, paint, furniture)	817,734	1,934,584	2,752,318
Rio MOD (Manufacturing)	637,672	1,974,169	2,611,841
District Wide DM (HVAC Controller upgrade)	2,491,817	113,971	2,605,788
District Wide Wireless Access Point (HP Aruba)	1,531,272	1,032,448	2,563,720
Del Campo Outdoor Learning (CRT)	212,904	2,238,968	2,451,872

**SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39
AND MEASURE P GENERAL OBLIGATION BONDS**

**PERFORMANCE AUDIT
JUNE 30, 2023**

Description	Prior Activities	June 30, 2023 Activities	Total
Bella Vista Energy (Solar Project)	2,321,020		2,321,020
Coleman (CMP Charter) MOD	114,319	2,200,600	2,314,919
Del Campo Roofing (DM)		2,273,491	2,273,491
Rio MOD (Health)	473,586	1,686,395	2,159,981
Encina Roofing (DM)		1,686,155	1,686,155
Encina Portable	88,312	1,587,468	1,675,780
Lichen DM (paint, floor, furniture)	482,198	1,174,948	1,657,146
Oakview DM (Roofing)	995,218	462,847	1,458,065
Casa Outdoor Learning (Tennis Court)	341,803	930,088	1,271,891
Laurel Ruff DM (Roofing)	712,362	478,181	1,190,543
Mariemont (MOD) (phase 1)	17,795	1,092,577	1,110,372
District Wide MDF Tech Services	954,197		954,197
Transportation Electrical	636,544	314,191	950,735
Underwriters' Discount & Other COI	931,697		931,697
Lichen DM (Kinder)	159,214	705,777	864,991
Casa Roble MOD	189,975	669,120	859,095
Tech Service Infrastructure	856,713		856,713
Debt Services	851,426		851,426
Mariemont (MOD) (phase 2)		755,021	755,021
DM (HVAC Controls) Phase 2	14,750	704,079	718,829
San Juan Outdoor Learning	713,029		713,029
Del Campo DM (Flooring)		631,403	631,403
Rio Flooring (DM)		608,398	608,398
Rio Student Safety (Parking)		499,093	499,093
District Wide DM (Intrusion Upgrade Region 2)	394,448		394,448
Howe Portable	385,640		385,640
District Wide DM Intrusion Upgrade Region 3	376,621		376,621
Mesa Verde MOD (Locker-RM)	24,930	314,930	339,860
Gold River Tech Service		299,459	299,459
Encina Middle MOD (Admin)	288,289		288,289
District Wide DM Intrusion Upgrade Region 1	281,616		281,616
Del Paso Manor Portable	273,229		273,229
El Camino Outdoor Learning (CRT)	220,479	10,427	230,906
Cost of Issuance	195,000		195,000
Encina MOD (CTE RM F1)	16,115	172,235	188,350
Mira Loma MOD (Locker-RM)	43,450	121,685	165,135
District Office MOD (Boardroom)	6,875	115,130	122,005

**SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39
AND MEASURE P GENERAL OBLIGATION BONDS**

**PERFORMANCE AUDIT
JUNE 30, 2023**

Description	Prior Activities	June 30, 2023 Activities	Total
Pasteur Infrastructure (slab repair)	6,250	63,900	70,150
Mariposa Roofing (DM)		69,989	69,989
Encina High School MOD	67,867		67,867
Gold River Roofing (DM)		64,102	64,102
Mira Loma MOD (CTE)		44,634	44,634
Katherine Johnson MOD	39,223		39,223
Trajan DM (Dry-rot)		11,576	11,576
Cottage Portable	3,850		3,850
 Total Uses	<u>244,493,576</u>	<u>119,166,575</u>	<u>363,660,151</u>
 Ending Balance	<u>\$ 200,521,484</u>	<u>\$ (105,437,241)</u>	<u>\$ 95,084,243</u>

**SAN JUAN UNIFIED SCHOOL DISTRICT PROPOSITION 39
AND MEASURE P GENERAL OBLIGATION BONDS**

**PERFORMANCE AUDIT
JUNE 30, 2023**

CONCLUSION

Based upon the procedures performed, we found that, for the items tested, the San Juan Unified School District has properly accounted for the expenditures of the Measure P General Obligation Bonds. Further, it was noted that the funds were not used for salaries of school administrators or other operating expenditures. Our audit does not provide a legal determination on the District's compliance with specific requirements.

MANAGEMENT COMMENTS AND RECOMMENDATIONS

None.

SAN JUAN UNIFIED SCHOOL DISTRICT

Communications With Those Charged With Governance

We have audited the financial statements of the Measure J, N, and P Building Funds of the San Juan Unified School District (the District) information of for the year ended June 30, 2023. Professional standards require that we provide you with information related to our audit. We are providing the District's Bond Oversight Committee (BOC) and the Board of Education (Board) with information regarding the scope and results of the audit to assist the BOC and the Board in overseeing management's financial reporting and disclosure process. This information is intended solely for the use of the BOC, Board, and management of the District and is not intended to be, and should not be, used by anyone other than these specified parties. The following pages summarize these required communications.

April 15, 2024

Submitted by



Relax. We got this.SM

MANAGEMENT AND AUDITOR RESPONSIBILITIES

Auditors' Responsibilities under Generally Accepted Auditing Standards (GAAS), *Government Auditing Standards*, issued by the Comptroller General of the United States.

The financial statements are the responsibility of management. As stated in our engagement contract, our responsibility is to express opinions about whether the financial statements prepared by management with your oversight are fairly presented, in all material respects, in conformity with U.S. generally accepted accounting principles. Our audit of the financial statements does not relieve you or management of your responsibilities.

As part of our audit, we considered the internal control of the District. Such considerations were solely for the purpose of determining our audit procedures and not to provide any assurance concerning such internal control.

As part of obtaining reasonable assurance about whether the District's financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grants, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit.

We issued unmodified opinions on the financial statements of the Measure J, N, and P Building Funds for the year ended June 30, 2023.

The financial statements of the Measure J, N, and P Building Funds of the District present only the Measure J, N, and P Building Funds and do not purport to, and do not present fairly the financial position of the District as of June 30, 2023, or the changes in its financial position for the year then ended in conformity with accounting principles generally accepted in the United States of America. Our opinions were not modified with respect to this matter.

QUALITATIVE ASPECTS OF ACCOUNTING PRACTICES

Significant Accounting Policies <p>Management is responsible for the selection and use of appropriate accounting policies. In accordance with the terms of our engagement contract, we advised management about the appropriateness of accounting policies and their application.</p>	<p>The significant accounting policies used by the Measure J, N, and P Building Funds of the District are described in Note 2 to the financial statements.</p> <p>We noted no transactions entered into by the Measure J, N, and P Building Funds of the District during the year for which there is a lack of authoritative guidance or consensus. There are no significant transactions that have been recognized in the financial statements in a different period than when the transaction occurred.</p>
Management Judgments and Accounting Estimates <p>Accounting estimates are an integral part of the financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ significantly from those expected.</p> <p>Certain financial statement disclosures are particularly sensitive because of their significance to financial statement users.</p>	We noted no estimates or disclosures that we consider particularly sensitive.

INTERACTIONS WITH MANAGEMENT

Planned Scope and Timing of the Audit	We performed the audit according to the planned scope and timing previously communicated in our engagement contract.
Management Consultations with Other Independent Accountants In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a “second opinion” on certain situations. If a consultation involves application of an accounting principle to the District’s financial statements or a determination of the type of auditor’s opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts.	To our knowledge, there were no such consultations with other accountants.
Disagreements with Management For purposes of this letter, professional standards define a disagreement with management as a financial accounting, reporting, or auditing matter, whether or not resolved to our satisfaction, that could be significant to the financial statements or the auditor’s report.	We are pleased to report that no such disagreements arose during the course of our audit.
Management Representations	We requested certain representations from management in a letter to us.
Difficulties Encountered in Performing the Audit	We encountered no significant difficulties in dealing with management in performing and completing our audit. Management and staff were well prepared and very cooperative.

OTHER MATTERS

Other Audit Findings or Issues	We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to retention as the District's auditors. However, these discussions occurred in the normal course of our professional relationship and our responses were not a condition to our retention.
Significant Risks Identified by the Auditor In order to design appropriate audit procedures in accordance with GAAS, the engagement team is required to perform a risk assessment during its audit planning process.	The following significant risks of material misstatement presumed by the auditing standards were incorporated into our audit plan: <ul style="list-style-type: none">• Properly approved project expenditures• Management override of controls.
Corrected and Uncorrected Misstatements Professional standards require us to accumulate all known and likely misstatements identified during the audit, other than those that are trivial, and communicate them to the appropriate level of management.	No significant adjustments were identified during our audit.

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: G-10

MEETING DATE: 05/14/2024

SUBJECT: Approval of First Amendment to Site Lease Agreement Between STC Five, LLC and San Juan Unified School District

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

DEPARTMENT: Facilities

ACTION REQUESTED:

The superintendent is recommending that the board approve the first amendment to the site license agreement between STC Five LLC, and the district for the cell site located on a portion of San Juan High School at 7551 Greenback Lane, Citrus Heights.

RATIONALE/BACKGROUND:

The original lessee, Sprint Spectrum, L.P., and the district entered into a site lease agreement dated February 13, 2001, in which Sprint Spectrum, L.P. leased certain real property, together with access and utility easements. STC Five LLC is now the current lessee under the agreement as a successor in interest with the original lessee. STC Five LLC and the district now desire to amend the agreement on the terms and conditions contained within the first amendment to the agreement.

ATTACHMENT(S):

- A: First Amendment to Site License Agreement
B: Aerial Exhibit

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FISCAL IMPACT:

Current Budget: \$N/A

Additional Budget: \$N/A

Funding Source: N/A

(Unrestricted Base, Supplemental, other restricted, etc.)

Current Year Only On-going

LCAP/STRATEGIC PLAN:

Goal: N/A Focus: N/A

Action: N/A

Strategic Plan: N/A

PREPARED BY: Frank Camarda, Chief Operations Officer 

APPROVED BY: Melissa Bassanelli, Superintendent of Schools 

**FIRST AMENDMENT TO
SITE LEASE AGREEMENT BETWEEN STC FIVE LLC AND
SAN JUAN UNIFIED SCHOOL DISTRICT**

THIS FIRST AMENDMENT TO SITE LEASE AGREEMENT (the "First Amendment") is made effective this ____ day of ___, 2024 ("Effective Date"), by and between SAN JUAN UNIFIED SCHOOL DISTRICT (hereinafter referred to as "Lessor") and STC FIVE LLC, a Delaware limited liability company, by and through its Attorney In Fact, Global Signal Acquisitions II LLC, a Delaware limited liability company (hereinafter referred to as "Lessee").

RECITALS

WHEREAS, Lessor and Sprint Spectrum, L.P. ("Original Lessee") entered into a Site Lease Agreement dated February 13, 2001 (the "Agreement") whereby Original Lessee leased certain real property, together with access and utility easements, located in Sacramento County, California from Lessor (the "Site"), all located within certain real property owned by Lessor ("Lessor's Property"); and

WHEREAS, STC Five LLC is currently the Lessee under the Agreement as successor in interest to the Original Lessee; and

WHEREAS, the Site may be used for the purpose of constructing, maintaining and operating a communications facility, including tower structures, equipment shelters, cabinets, meter boards, utilities, antennas, equipment, any related improvements and structures and uses incidental thereto; and

WHEREAS, the Agreement had an initial term that commenced on July 31, 2001 and expired on July 30, 2006. The Agreement provides for six (6) extensions of three (3) years each, all six (6) of which were exercised by Lessee, followed by one (1) extension of two years (each extension is referred to as a "Renewal Term"). According to the Agreement, the final extension expires on July 30, 2026; and

WHEREAS, Lessor and Lessee desire to amend the Agreement on the terms and conditions contained herein.

NOW THEREFORE, for good and valuable consideration, the receipt and sufficiency of which are acknowledged, Lessor and Lessee agree as follows:

1. Recitals; Defined Terms. The parties acknowledge the accuracy of the foregoing recitals. Any capitalized terms not defined herein shall have the meanings ascribed to them in the Agreement. All references in the Agreement to the capitalized term "District" shall be replaced with "Lessor".

2. Additional Renewal Terms. At the conclusion of the seventh Renewal Term (July 30, 2026), Lessee shall be entitled to five (5) additional extensions of five (5) years each, with the final lease extension expiring on July 30, 2051 (each additional extension is referred to as an "Additional Renewal Term"). The Initial Term, Renewal Terms, and Additional Renewal Terms shall be collectively referred to as the "Lease Term". Notwithstanding anything in the Agreement to the contrary, the Lease Term shall automatically be extended for each successive Additional

Renewal Term unless Lessee notifies Lessor of its intention not to renew at least ninety (90) days prior to the expiration of the then current term.

3. Consent to Sublease and Modification. In accordance with Section H.2. of the Agreement, Lessor hereby acknowledges and agrees to the sublease of a portion of the Site, as expanded, to Dish Network Corporation or an affiliate or subsidiary (the "Dish Subtenant") for purposes of installation, maintenance and replacement of equipment, antennas, cables, fiber, and related accessories on the Site for the operation of a wireless communications facility thereon ("Dish Sublease"). As used herein, the term "sublease" includes any arrangement by which a third party can collocate its equipment at the Site, whether it is by sublease, license, easement or any other agreement or arrangement. To the extent required by the Agreement, Lessor hereby further consents to the installation, maintenance, and operation of such improvements reasonably required by the Dish Subtenant to operate at the Site.

4. First Additional Lease Area. The existing Site is hereby expanded in size to include additional space, which consists of a three hundred thirty-one (331) square foot parcel of real property adjacent to the existing Site at a location more particularly described on Exhibit A-1 attached hereto and shown on the Site Plan attached hereto as Exhibit B (the "First Additional Lease Area"). The Site, as expanded, is described on Exhibit A-2 attached hereto. Notwithstanding anything to the contrary in this First Amendment, Lessee is not relinquishing any rights to any lease area, access easements, and/or utility easements that it possesses prior to the date of this First Amendment. In the event the location of any of Lessee's or its sublessees' existing improvements, utilities, and/or access routes are not depicted or described on the Site Plan and/or legal descriptions, Lessee's leasehold rights and access and utility easement rights over such areas shall remain in full force and effect and the Site shall be deemed to include such areas.

5. First Additional Rent. In consideration of the lease of the First Additional Lease Area, Lessee shall pay to Lessor a monthly fee equal to the greater of: (i) fifty percent (50%) of the rental, license or similar payments due to the Lessee from such Dish Subtenant (excluding any reimbursement of taxes, construction costs, installation costs, or revenue share reimbursement) (the "Additional Percentage Fee"), or (ii) One Thousand Five Hundred and 00/100 Dollars (\$1,500.00) per month (the "Additional Fixed Fee"). Lessor shall only be entitled to the greater of either the Additional Percentage Fee or the Additional Fixed Fee for the Dish Subtenant, but not both. The amount payable pursuant to the foregoing, whether the Additional Percentage Fee or Additional Fixed Fee, shall be referred to as the "First Additional Rent". The First Additional Rent shall be due and payable commencing on the earlier of (i) receipt of rent payments from the Dish Subtenant, or (ii) the commencement of installation of improvements within the First Additional Lease Area. Notwithstanding the foregoing, Lessor may elect to receive the lesser of either the Additional Percentage Fee or the Additional Fixed Fee during the next Additional Renewal Term by delivering written notice of its election to Lessee at least ninety (90) days prior to the expiration of the then current term. If Lessor fails to notify Lessee of its election prior to the aforementioned ninety-day deadline, then Lessee shall continue to pay the greater of the Additional Percentage Fee or the Additional Fixed Fee as set forth above. Lessee shall have sole discretion as to whether, and on what terms, to sublease, license or otherwise allow occupancy of the Site to the Dish Subtenant, however no such additional sublease, license or other occupancy shall be permitted without the prior written consent of the Lessor as set forth in Section H.2. of the Agreement. There shall be no express or implied obligation for Lessee to sublease, license or otherwise allow occupancy of the

Site. Lessee shall pay to Lessor the First Additional Rent until the earlier of (i) the expiration of the term of Lease; or (ii) the expiration or termination of the Dish Sublease.

6. Business Summary Report. Once per calendar year, Lessor may submit a written request to Lessee for a business summary report pertaining to Lessee's First Additional Rent obligations for the prior twelve (12) month period, and Lessee shall provide such written report to Lessor within sixty (60) days after Lessee's receipt of such written request. Lessor shall send such written request to the Notice address set forth in this First Amendment.

7. Right to Return the First Additional Lease Area. Lessee shall have the option, upon thirty (30) days prior written notice to Lessor, in its sole and absolute discretion, to return the First Additional Lease Area to the Lessor and to terminate the lease of the same by removing all improvements from the First Additional Lease Area and returning same to its condition as of the Effective Date, ordinary wear and tear excepted (the "Return of the First Additional Lease Area"). Effective upon removal of all improvements from the First Additional Lease Area, the First Additional Rent shall cease and will no longer be due or payable.

8. Reimbursement of Lessor's Costs. Lessee shall reimburse all of Lessor's costs, for review and approval by the Division of State Architect and the services of an Inspector of Record (as may be required) arising from or related to the Dish Sublease. Such reimbursement shall occur within sixty (60) days of Lessee's receipt of documentation from Lessor detailing the costs for such reimbursement as set forth in this Section 7. The Lessee shall also reimburse the Lessor for costs incurred for construction management services related to this First Amendment, in an amount not to exceed Two Thousand Five Hundred and 00/100 Dollars (\$2,500.00).

9. Rent. For the avoidance of doubt, in addition to the First Additional Rent, the rent payable by Lessee as of the Effective Date is Two Thousand Four Hundred Seventy-Five and 74/100 Dollars (\$2,475.74) per month. Such rent shall remain payable and shall continue to increase in accordance with the terms set forth in Section 2 of the Agreement.

10. Conditional Signing Bonus. As consideration, Lessee will pay to Lessor a one-time amount of Twenty Five Thousand and 00/100 Dollars (\$25,000.00) for the full execution of this First Amendment, payable within sixty (60) days of the full execution of this First Amendment ("Conditional Signing Bonus"). In the event that this First Amendment (and any applicable memorandum of Agreement and/or amendment) is not fully executed by both Lessor and Lessee for any reason, Lessee shall have no obligation to pay the Conditional Signing Bonus to Lessor.

11. Representations, Warranties and Covenants of Lessor. Lessor represents, warrants and covenants to Lessee as follows:

a) Lessor is duly authorized to and has the full power and authority to enter into this First Amendment and to perform all of Lessor's obligations under the Agreement as amended hereby.

b) Lessee is not currently in default under the Agreement, and to Lessor's knowledge, no event or condition has occurred or presently exists which, with notice or the passage of time or both, would constitute a default by Lessee under the Agreement.

c) Lessor agrees to provide such further assurances as may be requested to carry out and evidence the full intent of the parties under the Agreement as amended hereby, and ensure Lessee's continuous and uninterrupted use, possession and quiet enjoyment of the Site under the Agreement as amended hereby.

d) Lessor acknowledges that the Site, as defined, shall include any portion of Lessor's Property on which communications facilities or other Lessee improvements exist on the date of this First Amendment.

12. Notices. Lessee's notice address as stated in Section L.1. of the Agreement is amended as follows:

If to Lessee:

STC Five LLC
c/o Crown Castle USA Inc.
Attn: Legal - Real Estate Department
2000 Corporate Drive
Canonsburg, PA 15317

13. IRS Form W-9. Lessor agrees to provide Lessee with a completed IRS Form W-9, or its equivalent, upon execution of this First Amendment and at such other times as may be reasonably requested by Lessee. In the event the Lessor's Property is transferred, the succeeding Lessor shall have a duty at the time of such transfer to provide Lessee with a completed IRS Form W-9, or its equivalent, and other related paper work to effect a transfer in the rent to the new Lessor. Lessor's failure to provide the IRS Form W-9 within thirty (30) days after Lessee's request shall be considered a default and Lessee may take any reasonable action necessary to comply with IRS regulations including, but not limited to, withholding applicable taxes from rent payments.

14. Counterparts. This First Amendment may be executed in separate and multiple counterparts, each of which shall be deemed an original but all of which taken together shall be deemed to constitute one and the same instrument.

15. Remainder of Agreement Unaffected. In all other respects, the remainder of the Agreement shall remain in full force and effect. Any portion of the Agreement that is inconsistent with this First Amendment is hereby amended to be consistent.

16. Recordation. Lessee, at its cost and expense, shall have the right to record a memorandum of this First Amendment in the official records of Sacramento County, California at any time following the execution of this First Amendment by all parties hereto. In addition, Lessee shall have the right in its discretion, to record a notice of lease, affidavit or other form to be determined by Lessee without Lessor's signature in form and content substantially similar to the memorandum, to provide record notice of the terms of this First Amendment.

[Signature pages follow]

Lessor and Lessee have caused this First Amendment to be duly executed on the day and year first written above.

LESSOR:
SAN JUAN UNIFIED SCHOOL DISTRICT

By: _____

Print Name: _____

Title: _____

Lessor affirms that this First Amendment was approved at a duly noticed public meeting held on _____ 2024

[Lessee Execution Page Follows]

Attachment A

This First Amendment is executed by Lessee as of the date first written above.

LESSEE:

STC FIVE LLC, a Delaware limited liability
company

By: Global Signal Acquisitions II LLC, a
Delaware limited liability company
Its: Attorney In Fact

By: _____

Print Name: _____

Title: _____

Exhibit A-1
(Legal Description of First Additional Lease Area)

A PORTION OF LOT 6 OF CITRUS HEIGHTS ADDITION NO. 3 LOCATED WITHIN THE NORTHEAST QUARTER OF SECTION 35, TOWNSHIP 10 NORTH, RANGE 6 EAST OF THE MOUNT DIABLO MERIDIAN, SACRAMENTO COUNTY, CALIFORNIA, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

NOTE: ALL BEARINGS AND DISTANCES ARE BASED ON THE CALIFORNIA TWO STATE PLANE COORDINATE ZONE GRID. TO DERIVE GROUND DISTANCES DIVIDE BY 0.99993624

COMMENCING AT A NAIL AND TACK AT THE CENTERLINE INTERSECTION OF CHULA VISTA DRIVE AND MARIPOSA AVENUE, FROM WHICH A SPIKE AT THE INTERSECTION OF GREENBACK LANE AND MARIPOSA AVENUE BEARS SOUTH $00^{\circ} 49' 18''$ EAST, 1504.24 FEET;

THENCE FROM SAID POINT OF COMMENCEMENT SOUTH $00^{\circ} 49' 18''$ EAST ALONG THE CENTERLINE OF MARIPOSA AVENUE 1008.03 FEET; THENCE DEPARTING SAID CENTERLINE SOUTH $89^{\circ} 10' 42''$ WEST, 20.00 FEET TO A POINT ON THE WESTERLY RIGHT OF WAY OF MARIPOSA AVENUE; THENCE ALONG SAID RIGHT OF WAY SOUTH $00^{\circ} 49' 18''$ EAST, 72.82 FEET; THENCE DEPARTING SAID RIGHT OF WAY, NORTH $88^{\circ} 56' 22''$ WEST, 9.85 FEET TO THE POINT OF BEGINNING;

THENCE CONTINUING NORTH $88^{\circ} 56' 22''$ WEST, 11.85 FEET; THENCE NORTH $00^{\circ} 49' 22''$ EAST, 28.43 FEET; THENCE NORTH $89^{\circ} 41' 45''$ EAST, 11.29 FEET; THENCE SOUTH $00^{\circ} 18' 15''$ EAST, 28.71 FEET TO THE POINT OF BEGINNING.

CONTAINING 331 SQ. FT. OR 0.008 ACRES, MORE OR LESS.

**Exhibit A-2
(Legal Description of Site, as expanded)**

SITE, AS EXPANDED (comprised of Existing Lease Area, Tower Lease Area and Additional Lease Area)

EXISTING LEASE AREA

A PORTION OF LOT 6 OF CITRUS HEIGHTS ADDITION NO. 3 LOCATED WITHIN THE NORTHEAST QUARTER OF SECTION 35, TOWNSHIP 10 NORTH, RANGE 6 EAST OF THE MOUNT DIABLO MERIDIAN, SACRAMENTO COUNTY, CALIFORNIA, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

NOTE: ALL BEARINGS AND DISTANCES ARE BASED ON THE CALIFORNIA TWO STATE PLANE COORDINATE ZONE GRID. TO DERIVE GROUND DISTANCES DIVIDE BY 0.99993624

COMMENCING AT A NAIL AND TACK AT THE CENTERLINE INTERSECTION OF CHULA VISTA DRIVE AND MARIPOSA AVENUE, FROM WHICH A SPIKE AT THE INTERSECTION OF GREENBACK LANE AND MARIPOSA AVENUE BEARS SOUTH 00° 49' 18" EAST, 1504.24 FEET;

THENCE FROM SAID POINT OF COMMENCEMENT SOUTH 00° 49' 18" EAST ALONG THE CENTERLINE OF MARIPOSA AVENUE 1008.03 FEET; THENCE DEPARTING SAID CENTERLINE SOUTH 89° 10' 42" WEST, 20.00 FEET TO A POINT ON THE WESTERLY RIGHT OF WAY OF MARIPOSA AVENUE; THENCE ALONG SAID RIGHT OF WAY SOUTH 00° 49' 18" EAST, 72.82 FEET; THENCE DEPARTING SAID RIGHT OF WAY, NORTH 88° 56' 22" WEST, 9.85 FEET; THENCE NORTH 00° 18' 15" EAST, 28.71 TO THE POINT OF BEGINNING;

THENCE NORTH 89° 41' 45" WEST, 11.29 FEET; THENCE NORTH 00° 49' 22" EAST, 26.75 FEET; THENCE SOUTH 88° 16' 19" EAST, 10.77 FEET; THENCE SOUTH 00° 18' 15" EAST, 26.37 FEET TO THE POINT OF BEGINNING.

CONTAINING 293 SQ. FT. OR 0.007 ACRES, MORE OR LESS.

TOWER LEASE AREA

A PORTION OF LOT 6 OF CITRUS HEIGHTS ADDITION NO. 3 LOCATED WITHIN THE NORTHEAST QUARTER OF SECTION 35, TOWNSHIP 10 NORTH, RANGE 6 EAST OF THE MOUNT DIABLO MERIDIAN, SACRAMENTO COUNTY, CALIFORNIA, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

NOTE: ALL BEARINGS AND DISTANCES ARE BASED ON THE CALIFORNIA TWO STATE PLANE COORDINATE ZONE GRID. TO DERIVE GROUND DISTANCES DIVIDE BY 0.99993624 COMMENCING AT A NAIL AND TACK AT THE CENTERLINE INTERSECTION OF CHULA VISTA DRIVE AND MARIPOSA AVENUE, FROM WHICH A SPIKE AT THE INTERSECTION OF GREENBACK LANE AND MARIPOSA AVENUE BEARS SOUTH 00° 49' 18" EAST, 1504.24 FEET;

THENCE FROM SAID POINT OF COMMENCEMENT SOUTH 00° 49' 18" EAST ALONG THE CENTERLINE OF MARIPOSA AVENUE 1008.03 FEET; THENCE DEPARTING SAID CENTERLINE SOUTH 89° 10' 42" WEST, 20.00 FEET TO A POINT ON THE WESTERLY RIGHT OF WAY OF MARIPOSA AVENUE; THENCE DEPARTING SAID RIGHT OF WAY, SOUTH 89° 10' 42" WEST, 4.44 FEET TO THE POINT OF BEGINNING;

THENCE SOUTH 00° 35' 56" WEST, 6.00 FEET; THENCE NORTH 89° 24' 04" WEST, 8.00 FEET; THENCE NORTH 00° 35' 56" EAST, 6.00 FEET; THENCE SOUTH 89° 24' 04" EAST, 8.00 FEET TO THE POINT OF BEGINNING.

CONTAINING 42 SQ. FT. OR 0.001 ACRES, MORE OR LESS.

ADDITIONAL LEASE AREA

A PORTION OF LOT 6 OF CITRUS HEIGHTS ADDITION NO. 3 LOCATED WITHIN THE NORTHEAST QUARTER OF SECTION 35, TOWNSHIP 10 NORTH, RANGE 6 EAST OF THE MOUNT DIABLO MERIDIAN, SACRAMENTO COUNTY, CALIFORNIA, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

NOTE: ALL BEARINGS AND DISTANCES ARE BASED ON THE CALIFORNIA TWO STATE PLANE COORDINATE ZONE GRID. TO DERIVE GROUND DISTANCES DIVIDE BY 0.99993624

COMMENCING AT A NAIL AND TACK AT THE CENTERLINE INTERSECTION OF CHULA VISTA DRIVE AND MARIPOSA AVENUE, FROM WHICH A SPIKE AT THE INTERSECTION OF GREENBACK LANE AND MARIPOSA AVENUE BEARS SOUTH 00° 49' 18" EAST, 1504.24 FEET;

THENCE FROM SAID POINT OF COMMENCEMENT SOUTH 00° 49' 18" EAST ALONG THE CENTERLINE OF MARIPOSA AVENUE 1008.03 FEET; THENCE DEPARTING SAID CENTERLINE SOUTH 89° 10' 42" WEST, 20.00 FEET TO A POINT ON THE WESTERLY RIGHT OF WAY OF MARIPOSA AVENUE; THENCE ALONG SAID RIGHT OF WAY SOUTH 00° 49' 18" EAST, 72.82 FEET; THENCE DEPARTING SAID RIGHT OF WAY, NORTH 88° 56' 22" WEST, 9.85 FEET TO THE POINT OF BEGINNING;

THENCE CONTINUING NORTH 88° 56' 22" WEST, 11.85 FEET; THENCE NORTH 00° 49' 22" EAST, 28.43 FEET; THENCE NORTH 89° 41' 45" EAST, 11.29 FEET; THENCE SOUTH 00° 18' 15" EAST, 28.71 FEET TO THE POINT OF BEGINNING.
CONTAINING 331 SQ. FT. OR 0.008 ACRES, MORE OR LESS.

ACCESS & UTILITY EASEMENT: NON-EXCLUSIVE

A PORTION OF LOT 6 OF CITRUS HEIGHTS ADDITION NO. 3 LOCATED WITHIN THE NORTHEAST QUARTER OF SECTION 35, TOWNSHIP 10 NORTH, RANGE 6 EAST OF THE MOUNT DIABLO MERIDIAN, SACRAMENTO COUNTY, CALIFORNIA, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

NOTE: ALL BEARINGS AND DISTANCES ARE BASED ON THE CALIFORNIA TWO STATE PLANE COORDINATE ZONE GRID. TO DERIVE GROUND DISTANCES DIVIDE BY 0.99993624

COMMENCING AT A NAIL AND TACK AT THE CENTERLINE INTERSECTION OF CHULA VISTA DRIVE AND MARIPOSA AVENUE, FROM WHICH A SPIKE AT THE INTERSECTION OF GREENBACK LANE AND MARIPOSA AVENUE BEARS SOUTH 00° 49' 18" EAST, 1504.24 FEET;

THENCE FROM SAID POINT OF COMMENCEMENT SOUTH 00° 49' 18" EAST ALONG THE CENTERLINE OF MARIPOSA AVENUE 1008.03 FEET; THENCE DEPARTING SAID CENTERLINE SOUTH 89° 10' 42" WEST, 20.00 FEET TO A POINT ON THE WESTERLY RIGHT OF WAY OF MARIPOSA AVENUE AND THE POINT OF BEGINNING;

THENCE ALONG SAID RIGHT OF WAY SOUTH 00° 49' 18" EAST, 72.82 FEET; THENCE DEPARTING SAID RIGHT OF WAY, NORTH 88° 56' 22" WEST, 9.85 FEET; THENCE NORTH 00° 18' 15" WEST, 55.07 FEET; THENCE NORTH 88° 16' 19" WEST, 10.77 FEET; THENCE SOUTH 00° 49' 22" WEST, 55.18 FEET; THENCE NORTH 88° 56' 22" WEST, 17.99 FEET; THENCE NORTH 00° 48' 01" WEST, 72.14 FEET; THENCE SOUTH 89° 56" 02" EAST, 5.00 FEET TO A POINT HEREINAFTER KNOWN AS POINT "A"; THENCE CONTINUING SOUTH 89° 56' 02" EAST, 22.21 FEET THENCE SOUTH 00° 35' 56" WEST, 6.00 FEET; THENCE SOUTH 89° 24' 04" EAST, 8.00 FEET; THENCE NORTH 00° 35' 56" EAST, 6.00 FEET; THENCE NORTH 89° 10' 42" EAST, 4.44 FEET TO THE POINT OF BEGINNING;

TOGETHER WITH A STRIP OF LAND 10.00 FEET WIDE, LYING 5.00 FEET ON BOTH SIDES OF THE FOLLOWING DESCRIBED CENTERLINE:

BEGINNING AT AFOREMENTIONED POINT "A", THENCE NORTH 00° 03' 58" EAST, 26.20 FEET TO A POINT OF TANGENT CURVE TO THE LEFT HAVING A RADIUS OF 130.00 FEET; THENCE NORTHWESTERLY ALONG SAID CURVE THROUGH A CENTRAL ANGLE OF 65° 38' 21", AN ARC DISTANCE OF 148.93 FEET TO A POINT OF A REVERSE CURVE HAVING A RADIUS OF 20.00 FEET; THENCE NORTHWESTERLY ALONG SAID CURVE THROUGH A CENTRAL ANGLE OF 64° 59' 17" AN ARCDISTANCE OF 22.69 FEET; THENCE NORTH 00° 35' 06" WEST, 9.35 FEET TO A POINT OF TANGENT CURVE TO THE RIGHT HAVING A RADIUS OF 15.00 FEET; THENCE NORTHEASTERLY ALONG SAID CURVE THROUGH A CENTRAL ANGLE OF 90° 00' 00" AN ARC DISTANCE OF 23.56 FEET; THENCE NORTH 89° 24' 54" EAST, 95.14 FEET TO A POINT ON THE WESTERLY RIGHT OF WAY OF MARIPOSA AVENUE AND THE POINT OF TERMINUS.

THE SIDELINES OF SAID STRIP OF LAND ARE TO INTERSECT AT ALL ANGLE POINTS TO PROVIDE THE SPECIFIED WIDTH THROUGHOUT SO AS TO NOT CAUSE ANY GAPS OR OVERLAPS IN SAID EASEMENT AND ARE TO BE LENGTHENED OR SHORTENED TO TERMINATE ON SAID WEST LINE OF MARIPOSA AVENUE.

CONTAINING 5,461 SQ. FT. OR 0.125 ACRES, MORE OR LESS.

**Exhibit B
(Site Plan)**

Aerial Exhibit of
Tower at San Juan
High School



**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: **G-11**

MEETING DATE: **05/14/2024**

SUBJECT: Approval of Master Contract Agreement
For Architectural/Engineering Services and Short List
of Qualified Vendors

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

DEPARTMENT: Facilities

ACTION REQUESTED:

The superintendent is recommending the board approve the master contract agreement for architectural/engineering services along with the short list of qualified vendors.

RATIONALE/BACKGROUND:

The master contract agreement (“Agreement”) is by and between the district and the architectural firms listed on attachment B. The agreement shall remain in effect until Augst 1, 2029, unless otherwise terminated earlier in accordance with the terms of the agreement. The agreement is for the following services: general A-E services, design-build services, and specialty services as assigned within the scope of work.

ATTACHMENT(S):

A: Master Contract Agreement
B: RFP 24-220, Short List of Qualified Vendors

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FISCAL IMPACT:

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

LCAP/STRATEGIC PLAN:

Goal: N/A Focus: N/A
Action: N/A

Strategic Plan: N/A

PREPARED BY:

Nicholas Arps, Director, Facilities, Construction and Modernization NA
Frank Camarda, Chief Operations Officer FC

APPROVED BY:

Melissa Bassanelli, Superintendent of Schools MB

MASTER CONTRACT AGREEMENT

Between

San Juan Unified School District

And

[Architect]

For

Architectural/Engineering Services

DOCUMENTS BOUND HEREWITH

Agreement Form

- Exhibit A: Service Order Form
- Exhibit B: Price Proposal
- Exhibit C: District Design Standards
- Exhibit D: Responsibility Matrix
- Exhibit E: Responsibilities and Services of the Architect
- Exhibit F: Architect-Engineer Certification
- Exhibit G: List of Employees Authorized to Come on to School Campuses
- Exhibit H: Project Management Internet Communication Requirements
- Exhibit I: Certification Regarding Russian Sanctions

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San Juan Unified School District

Master Agreement for Architectural/Engineering Services

This agreement is contingent upon San Juan Unified School District Board approval and will not be valid unless and until approved.

THIS AGREEMENT, made on June 1, 2024, by and between San Juan Unified School District ("Owner"), and **[Architect]** ("A-E"), duly licensed by the laws of the State of California to practice architecture or engineering in the State of California, license number _____. This Agreement shall remain in effect until July 1, 2029 unless otherwise terminated earlier in accordance with the terms of the Agreement.

Notwithstanding the foregoing, any Service Order issued prior to expiration of this Agreement shall remain in effect, including all terms of this Agreement applicable to the Service Order, through the term of the Project for which it is issued. Owner reserves the right to extend this Agreement for an additional one-year term by notice to A-E.

Owner intends to construct various construction projects, which may include "design-build" contracts under Education Code sections 17250.10 *et seq.* Owner desires to retain A-E as part of a pool of qualified Architects and Engineers who will be selected and issued service orders to provide performance criteria, predesign, schematic design, design development, construction documents, bidding, and/or construction phase services in connection with one or more projects, to be more fully defined in the service order. Projects may include those using traditional design-bid-build, design-build, lease-leaseback projects, and other authorized methodologies. Award of this Agreement does not guarantee A-E any particular number or amount of service orders, which will be awarded based on the needs of the project and the Owner.

This Agreement is for the following services:

- | | | |
|--|----------------------------------|------------------------------------|
| <input type="checkbox"/> General A-E Services | | |
| <input type="checkbox"/> Design-Build Services | <input type="checkbox"/> Primary | <input type="checkbox"/> Secondary |
| <input type="checkbox"/> Specialty Services (specify): _____ | | |

ARTICLE 1. DEFINITIONS

ARCHITECT-ENGINEER (A-E): The organization or individual providing those professional design services associated with construction, alteration, or repair of real property.

BASIC SERVICES: Those services as defined below in Article 3 and in the attached Exhibit E, as may be further defined in a Service Order.

CONSTRUCTION BUDGET: The total available funding for work to be bid to construction contractors, excluding change orders.

CONSTRUCTION DOCUMENTS: The complete working drawings and specifications setting forth in detail sufficient for construction the work to be done and the materials, workmanship, finishes and equipment required for a complete Project, including without limitation the architectural, structural, mechanical, electrical, and fire protection systems, landscape design, utility-service-connected equipment, and site work, and all other systems necessary for a complete Project.

CONTRACT DOCUMENTS: Those documents required for construction of the Project, including but not limited to this Agreement, any Service Order issued hereunder, the Construction Documents, bidding documents, proposal and contract forms, construction general conditions, and any other information determined to be included by A-E and/or Owner.

CONTRACTOR: The construction contractor who receives the contract award for construction of the Project, as defined below. For Design-Build Projects, "Contractor" shall be understood to refer to the Design-Builder.

DESIGN-BUILD: A construction methodology in which the Owner awards a contract for both design and construction of a Project to a single entity, and the A-E under this Agreement is not responsible for completing the design.

DSA: The Department of General Services, Division of the State Architect.

ESTIMATE: A-E's opinion of probable construction costs if the Project were to be put out to bid during the time specified in the A/E's estimate.

OWNER'S CONSTRUCTION MANAGER (or "CM"): The agent appointed by Owner as Owner's representative(s) to provide overall project management and to manage the design and construction phases of the Project. For purposes of this Agreement, the CM shall be considered to possess the same rights as Owner, except that the terms of this Agreement and any Service Order issued hereunder shall not be modified without the approval of Owner.

PROJECT: A specific project to be defined further in a Service Order issued under this Agreement and the construction thereof, including the Architect's services thereon, as described in this Agreement.

PROJECT BUDGET: The total available funding as appropriated through the State School Facilities Program, local bond measure, or other means to be used for the design and construction of the Project. It is the intent of Owner that the Project Budget include all costs for design, engineering, construction, inspection, technical consultant, surveys, testing, project management, Project contingencies, furniture and equipment, and such administrative costs of Owner as Owner shall deem appropriate.

PROJECT CONSTRUCTION COST: The cost to Owner of all work designed or specified by A-E, including work covered by alternates, but excluding the following: any payments to A-E or consultants, any costs of inspections, surveys, tests, or fees, and any project management fee.

SERVICE ORDER: A written order issued by the Owner under this Master Agreement identifying a specific Project and Project Budget for which A-E is being retained to provide Basic Services and specified additional services in connection with the Project. The Service Order form is attached as Exhibit A.

SPECIALTY PROJECT: A Project for which A-E is assigned a limited scope of work, generally involving specialized work or expertise.

ARTICLE 2. BUDGETS

A. The Construction Budget (or Design and Construction Budget) will be established in the Service Order. For Projects other than Design-Build Projects or Specialty Projects, A-E shall design the Project in a manner that it can be constructed for a cost within the Construction Budget. For Design-Build Projects, A-E shall provide sufficient information for the Design-Builder to design and construct the Project for a cost within the Design and Construction Budget.

B. A-E shall follow the Owner's Design Standards and other programmatic requirements in choosing materials, systems, and components affecting the quality of construction. The Owner's current Design Standards are set forth in Exhibit C. The Design Standards, including Owner's Technical Specifications, are periodically updated. A-E is required to use the most current version at the time any Service Order is issued.

C. For Projects other than Design-Build or Specialty Projects, in accordance with Article 10 and Exhibit E, A-E shall prepare and submit for Owner review Estimates of Project Construction Costs at the following phases (unless the phase is not included in the Service Order):

1. Conceptual Estimate of the Project Construction Phase at the end of schematic phase.

2. Design development Estimate at the end of the design development phase

3. 50% Construction Document Estimate.

4. 100% Construction Document Estimate.

5. If redesign is required due to the Project bidding over the Project Construction Cost in the approved Construction Budget by more than ten percent (10%), A-E shall revise the design documents at its sole expense and shall perform a revised 100% Construction Document Estimate of the Project Construction Cost and submit it to Owner for review.

ARTICLE 3A. BASIC SERVICES OF A-E: DESIGN-BUILD PROJECTS

Time is of the essence in this Agreement. A-E shall perform its Basic Services in accordance with the schedule set forth in the Service Order. The time performing services under this Agreement may be extended only in writing and by mutual consent of the parties.

Except to the extent modified by the Service Order, A-E's Basic Services for Design-Build Projects shall include all work necessary for the development/modification of Performance Criteria for the Project. A-E's work shall be in accordance with this Agreement, Owner's most updated Design Standards and Specifications, the Service Order, and applicable laws and regulations. In addition to preparation of Project-specific Performance Criteria, A-E's Basic Services shall include all work necessary to review Design-Builder's design and construction documents, construction administration and field observation of actual construction of the Project for conformance with the Performance Criteria, and reporting and attendance at meetings as requested.

To the extent necessary to perform its Basic Services, A-E shall furnish, at its expense, the services of all necessary design professionals, such as structural, civil, mechanical, and electrical engineers, as determined by A-E and acceptable to Owner.

A-E's Basic Services shall include the following components:

A. Performance Criteria Phase

1. A-E shall review site surveys, existing record documents, seismic data, mechanical, geotechnical, and other test reports, environmental documents and any other tests or reports furnished to A-E pursuant to Article 9 of this Agreement. After examining the site, A-E shall advise Owner as to whether such data is sufficient for purposes of modifying the Performance Criteria or whether additional data is needed. If additional data is needed, A-E shall recommend and specify the manner in which the necessary information/data shall be provided and needed services be obtained.

2. A-E shall prepare Project-specific Performance Criteria documents based on the general Performance Criteria documents, the program approved by Owner, Owner's Design Standards, Master Specifications, Education Specifications, schedule and Design and Construction Budget for the Project.

B. Solicitation and Award Phase

1. A-E shall assist Owner during solicitation and award phase for selection of the Design-Builder, as follows:

- a) Attendance at and participation in pre-proposal meetings;
- b) Responding to technical questions from proposers in a timely manner, so as not to delay proposals;

- c) Preparation of addenda, as requested by Owner;
- d) Evaluate proposals, as requested by Owner; and
- e) Participate in interviews of proposers as requested by Owner.

C. Project Administration Phase

If requested by Owner, Project Administration Phase services will be confirmed in the Service Order and may include some or all of the following:

1. A-E shall assist Owner in its review and approval of all design-build documents developed by Design-Builder, including schematic design, design development and construction documents for conformity with the final Performance Criteria, subject to changes approved in writing by Owner.
2. A-E shall perform the services specified in Article 3B, Construction Phase, Section F.3 through F.10 below.

ARTICLE 3B. BASIC SERVICES OF A-E: PROJECT OTHER THAN DESIGN-BUILD

Time is of the essence in this Agreement. A/E shall perform its Basic Services in accordance with the schedule set forth in the Service Order. The time performing services under this Agreement may be extended only in writing and by mutual consent of the parties.

Except to the extent modified by the Service Order, A-E's Basic Services for Projects other than design-build Projects shall include all work described herein for the development of design drawings and specifications, consistent with the delivery method for construction services, together with development of estimates of the Project Construction Cost, construction administration and field observation of actual construction of the Project, all in accordance with this Agreement, Owner's most updated Design Standards, the Service Order, and applicable laws and regulations. Except to the extent modified in the Service Order, A-E's Basic Services, set forth more specifically in Exhibit E, shall include design, estimating the Project Construction Cost, construction administration, reporting, and attendance at meetings as required below, and in Exhibit E. Except as may be modified in the Service Order, if any conflict exists between this Agreement and Exhibit E, the provision reflecting a broader scope of Basic Services shall control.

A-E shall, as part of the Basic Services, furnish, at its expense, the services of an estimator, structural, civil, mechanical, and electrical engineers, and other necessary design professionals, such as a low voltage consultant, a landscape architect, and/or a kitchen consultant, as determined by A-E and acceptable to Owner.

A-E's Basic Services shall include the following components:

A. Schematic Design Phase

1. A-E shall review site surveys, existing record documents, seismic data, mechanical, geotechnical and other test reports, environmental documents and any other tests or reports furnished to A-E pursuant to Article 9 of this Agreement. After examining the site, A-E shall advise Owner as to whether such data are sufficient for purposes of design or whether additional data are needed. If additional data are needed, A-E shall recommend and specify the manner in which the necessary information/data shall be provided and needed services be obtained.

2. A-E shall prepare base drawings that thoroughly document existing site conditions, including without limitation any structures or appurtenances that have been added to buildings or site without proper DSA approval, and any evidence visible from the exterior of building or from occupied spaces of building deterioration due to dryrot, termite, or other environmental damage, in order to minimize changes due to unforeseen site conditions during construction.

3. A-E shall prepare schematic design documents based on the program approved by Owner, schedule, and Construction Budget for the Project. The schematic design documents shall establish the conceptual design of the Project illustrating the scale and relationship of the Project components. The schematic design documents shall include a conceptual site plan and preliminary building plans, sections, and elevations. At the A-E's option, or at the request of the Owner, the schematic design documents may include study models, perspective sketches, electronic modeling or combinations of these media. Preliminary selections of major building systems and construction materials shall be noted on the drawings or described in writing.

4. Owner shall approve the schematic design documents in writing prior to A-E beginning the design development document phase. A-E may be required to present schematic design documents to Owner's facility representatives and/or and Board of Education prior to approval.

B. Design Development Document Phase

1. A-E shall prepare design development documents based on the approved schematic design documents and Construction Budget. The design development documents shall illustrate and describe the refinement of the design of the Project, establishing the scope, relationships, form, size and appearance of the Project by means of plans, sections, elevations, typical construction details, and equipment layouts. The design development documents shall include specifications that identify major materials and systems and establish in general their quality levels.

2. For constructability and to fully coordinate existing conditions into Construction Documents prepared by A-E, A-E shall investigate and take measurements of observable existing conditions and facilities. Where existing conditions are concealed, A-E shall make reasonable recommendations to Owner as to whether such conditions should be exposed and, if so, the specific extent of such exposure. Owner may, but need not, follow A-E's recommendations. If Owner takes action to expose concealed conditions, A-E shall proceed with investigating and taking measurements.

3. A-E shall advise and assist Owner in applying for and obtaining required approvals from all applicable governmental agencies having jurisdiction in a timely manner so as not to delay the Project.

4. Owner shall approve the design development documents and Estimate for the Project Construction Cost in writing prior to A-E beginning the Construction Documents phase. A-E may be required to present design development drawings to Owner's facility representatives and/or and Board of Education prior to approval.

C. Construction Document Phase (Final Plans)

1. A-E shall prepare, based on the approved scope of work, site survey and observation, as-built and survey information, Base Drawings and basic program scope or any further adjustment in the scope or quality of the Project authorized by Owner, working drawings and specifications setting forth in detail and prescribing the work to be done and the materials, workmanship, finishes, and equipment required for the architectural, structural, mechanical, and electrical service connected equipment.

2. When the Construction Documents are fully coordinated and its quality control review is completed, A-E shall notify Owner that the Construction Documents are ready for third party review. A-E shall cooperate with Owner in submitting the Construction Documents to a third party for peer review and shall incorporate agreed upon third party peer review comments into the Construction Documents prior to obtaining final approval from DSA.

3. A-E shall be responsible for coordinating its specifications with Division 0 and 1 documents supplied by Owner.

4. A-E shall prepare "A1" evacuation map(s) during construction phasing and completion, and final utilization map(s) of the entire site in 8-1/2 x 11 format including building designations, usage and square footage. These maps will be created using the District's site base CAD files for updating and creation of the maps.

5. The Construction Documents shall be consistent with a design that can be constructed within the Construction Budget.

6. A-E shall assist Owner in applying for and obtaining required approvals from applicable state agencies having jurisdiction over the Project, including without limitation DSA. Except as may be modified in a Servicer Order, assistance with OPSC and CDE approvals shall be limited to that defined in the responsibility matrix in Exhibit D.

D. Storm Water Prevention

1. A-E acknowledges that all California school districts are obligated to develop and implement the following storm water requirements, without limitation:

a) A municipal Separate Storm Sewer System (MS4). An MS4 is a system of conveyances used to collect or convey storm water, including, without limitation, catch basins, curbs, gutters, ditches, man-made channels, and storm drains.

b) A Storm Water Pollution Prevention Plan (SWPPP) at

(1) Sites where Owner engages in maintenance (e.g., fueling, cleaning, repairing) of transportation activities;

(2) Construction sites where one or more acres of soil will be disturbed or where each Project is part of a larger common plan of development that disturbs one or more acres of soil.

2. A-E shall conform its design work with Owner's storm water requirements indicated above, that are approved by Owner and applicable to the Project, at no additional cost to Owner. In addition, as required, A-E shall develop a grading and drainage plan and a site plan from architectural information showing a final development of the site. This drawing will also include a horizontal and vertical control plan and a utility infrastructure plan. The Services described in this Article 3B.D shall be provided by a professional civil engineer who contracts with or is an employee of A-E. Owner, at its sole discretion, may pay A-E for Extra Services to comply with this provision if the Services required are in excess of those normally required for services of the type in this Agreement.

E. Bid/Solicitation and Award Phase

A-E shall assist Owner during bid/proposal solicitation and award phase as follows:

1. Attendance at and participation in prebid/pre-solicitation meetings;

2. Responding to technical questions from bidders/proposers in a timely manner so as not to delay bid/proposal date;
3. Preparation of addenda as requested by Owner; and
4. Participate in interviews of Proposers/Bidders, Project Inspectors and/or Special Inspectors as requested by Owner.

F. Construction Phase

1. A-E shall provide general direction to the Project Inspector employed by and responsible to Owner, as required by the Education Code, DSA regulations, and Title 24 of the California Code of Regulations. A-E shall advise the inspector and contractor in the preparation of a marked set of prints, indicating dimensioned location of buried utility lines and other construction features (record drawings), which shall be forwarded to A-E upon completion of the Project.

2. A-E shall administer the Construction Phase, as required by this Agreement, the Contract Documents, the Service Order, and the applicable statutes and regulations, including requirements related to the DSA Box. Its communications shall be in the format set forth in Exhibit H hereto, Project Management Internet Communication Requirements. A-E shall comply with all timelines set forth in the Contract Documents for its Construction Phase services. A-E shall observe and become familiar with the general quality of construction and report in writing to Owner any instance where the materials, workmanship, or the general quality of construction is not in conformance with the plans and specifications, building code requirements, or generally accepted industry standards of quality.

3. In providing services during the Construction Phase, A-E shall employ Key Personnel identified in the Service Order and other individuals to whom Owner has no reasonable objection. In the event Owner has a reasonable objection to any employee of A-E performing work at the Project, including any Key Personnel, it shall notify A-E, and A-E shall promptly remove the individual from the Project.

4. A-E, as a representative of Owner, shall make periodic visits to the site to render architectural observations (1) to become generally familiar with and to keep Owner informed about the progress and quality of the portion of the work completed, (2) to endeavor to guard Owner against defects and deficiencies in the work, and (3) to determine in general if the work is being performed in a manner indicating that the work, when fully completed, will be in accordance with the Contract Documents. A-E shall not be required to make exhaustive or continuous on-site inspections to check the quality or quantity of the work. A-E shall attend on-site construction meetings at least once per week and shall otherwise be available to Owner and the Project Inspector for site meetings on

an “as-needed” basis. Refer to Exhibit E or the Service Order for the minimum amount of meetings required for the project. The minimum hours to be spent at the site during the Construction Phase are anticipated to be as follows, subject to revision in the Service Order:

Architect	12 hours per month
Mechanical Engineer	4 hours per month
Electrical Engineer	4 hours per month

These hours constitute a “pool” of hours available to the Owner, and the Owner or its representative can call on the A-E as needed for additional site visits within the available pool of hours. Any unused hours within a month will roll over into the following month. Note that the number of hours indicated **do not** include the time spent by the A-E to develop the punch list or back check it for its completion and acceptance.

A-E shall neither have control over or charge of, nor be responsible for, the construction means, methods, techniques, sequences or procedures, or for safety precautions and programs in connection with the work, which are Contractor's rights and responsibilities under the Contract Documents.

5. A-E shall make regular reports as may be required by applicable state agencies, including without limitation any reports required to be submitted through the DSA Box; review submittals and shop drawings for compliance with design intent; review Requests for Information (“RFI”) and promptly issue responses; review requests for substitution of materials, equipment, and the laboratory reports thereof; assist in the preparation of change orders in a format acceptable to DSA, for written approval of Owner; provide a color schedule of all materials in the Project for Owner's review and approval; assist in determining date of final completion; make final review of the Project; review written guarantees, instruction books, diagrams, and charts required of the Contractor; issue A-E's certificate of completion and final certificate for payment; and provide all close-out documentation required by applicable state agencies, as well as as-built (record) documents within sixty (60) days of completion.

6. A-E shall review Contractor's applications for payment and certify the amounts due Contractor and shall issue certificates for payment in such amounts. A-E's certification for payment shall constitute a representation to Owner, based on A-E's evaluation of the work and on the data comprising Contractor's application for payment, that the work has progressed to the point indicated and that, to the best of the A-E's knowledge, information, and belief, the quality of the work is in accordance with the Contract Documents.

7. A-E shall interpret, advise Owner, and decide matters concerning the Contract Documents or performance of Owner and Contractor under the requirements of the Contract Documents on written request of either Owner or

Contractor. A-E's response to such requests shall be made with reasonable promptness and within any time limits agreed upon or set forth in the Contract Documents. Interpretations and decisions of the A-E shall be consistent with the intent of and reasonably inferable from the Contract Documents and shall be in writing or in the form of drawings. When making such interpretations and decisions, A-E shall endeavor to secure faithful performance by both Owner and Contractor, and shall not show partiality to either.

8. At Owner's written request, A-E shall assist Owner with any claim resolution process involving Contractor and Owner, including, without limitation, serving as a witness or providing other professional services relating to hearings or other legal proceedings.

a) The parties recognize that this clause is a means of expediting resolution of claims among Owner, Contractor, and A-E. However, it is understood that Contractor is not an intended third-party beneficiary of this clause.

b) Compensation for these services under this paragraph 8 of Article 3B.F shall be provided as set forth in the payment provisions for Extra Services under Articles 11 and 12 and shall be computed and invoiced at hourly rates, not to exceed A-E's normal and customary hourly rates for such forensic services, to be negotiated with Owner at the time Owner authorizes these services, subject to the following:

i) Owner may believe that A-E's work under this Agreement is connected with errors, or omissions or problems related to a claim. As a result, and upon notice of same by Owner, A-E's payment for these Extra Services may be held in suspense by Owner, at Owner's sole discretion, until final determination in accordance with Article 20 of this Agreement or by a court of law or arbitration of the proportion that A-E's fault bears for breach of the legal standard of care required under California law, to the fault of all parties concerned.

ii) Such amount in suspense, proportionate to the final determination that A-E's fault bears to the fault of all parties concerned, shall not be paid to A-E. However, the remainder of any such amount in suspense shall be paid to A-E after a final determination in accordance with Article 20 of this Agreement or by a court of law or arbitration is made and A-E submits a proper invoice to Owner, which shall be paid in accordance with Owner's normal and customary practice of payment of A-E's invoices under this Agreement.

c) Nothing in this paragraph 8, including its subparagraphs, of Article 3B.F shall in any way limit Owner's rights and remedies under this Agreement against A-E for any errors or omissions or breaches related to this Agreement and/or A-E's responsibilities under it.

9. A-E, as part of its Basic Services, will perform a follow-up review and prepare a written report for Owner on apparent deficiencies in construction not later than one (1) month prior to the expiration of the General Construction Contract guarantee period of the Project.

10. Owner shall have the right to change the scope of A-E's Construction Phase services, which change shall be memorialized by written amendment to the Service Order, signed by officials of A-E and Owner having authority equal to or greater than that of the officials signing this Agreement.

ARTICLE 3C. BASIC SERVICES OF A-E: SPECIALTY PROJECTS

Time is of the essence in this Agreement. A/E shall perform its Basic Services in accordance with the schedule set forth in the Service Order. The time performing services under this Agreement may be extended only in writing and by mutual consent of the parties.

A-E's Basic Services for Specialty Projects shall include all work which is identified in the Service Order. That work may include any of the work under Articles 3A and/or 3B above. A-E shall perform its Basic Services in accordance with this Agreement, Owner's most updated Design Standards, the Service Order, and applicable laws and regulations.

ARTICLE 4. PROFESSIONAL SERVICES

A. A-E accepts the relationship of trust and confidence established between Owner and A-E by this Agreement. A-E represents that it is familiar with the statutes, regulations, and design requirements applicable to public school construction, that all of its work will conform to current professional practices and standards regarding such requirements, and that A-E will exercise due professional care and will cooperate with any contractor or CM also employed by Owner in connection with the Project. A-E agrees to perform its work consistent with the professional skill and care ordinarily provided by architects and engineers practicing in the same or similar location under the same or similar circumstances. The A-E shall perform its services as expeditiously as is consistent with such professional skill and care the orderly progress of the Project and consistent with the interests of Owner. Any review, approval or acceptance of any of A-E's work under this Agreement shall not relieve A-E from responsibility for errors and/or omissions in its work or the work of its subconsultants.

B. Except with Owner's knowledge and consent, the A-E shall not engage in any activity, or accept any employment, interest, or contribution that would reasonably appear to compromise the A-E's professional judgment, impartiality, or professionalism

with respect to a Project. Where A-E is awarded a Service Order related to a Project, A-E may not have any role in any other contract with the District related to that Project. In addition, at no time while A-E is engaged by Owner under a Service Order shall A-E be a member of any design-build entity for a different Project without obtaining the prior written consent of the Owner that the Owner does not consider A-E's role in the design-build entity to be a conflict of interest.

C. As part of its Basic Services, A-E shall furnish, at its expense, the services of any other design professionals reasonably required to perform the Services specified in the Service Order, as determined by A-E and acceptable to Owner. Such employees or subconsultants shall be properly skilled and licensed in the various aspects of the design and construction of facilities required. Owner does not assume any liability, duty, or obligation to A-E's subconsultants or their agents and employees by execution or performance of this Agreement, and nothing in this Agreement shall create any contractual relation between Owner and any subconsultants, or their agents and employees, employed by A-E. No subconsultants, agents, employees, or other parties are third party beneficiaries of this Agreement. A-E shall be responsible to Owner for the acts and omissions of its employees, subconsultants, and their agents and employees, and other persons performing any of the work under this Agreement for whom they are legally liable.

D. A-E shall, as part of Basic Services, coordinate work with professional consultants hired directly by Owner, which may include any of the following (or others):

1. Geotechnical Engineer
2. CEQA Consultant
3. Hazardous Material Consultant
4. Third Party Commission and/or Quality Control Consultants
5. Site Surveys

E. For Projects other than Design-Build or Specialty Projects, as part of its Basic Services, A-E shall be responsible for the design, DSA approval, contract/bidding documents, and construction administration for the fire alarm system if it is part of the scope of the Project.

F. A-E shall not, either during or after the term of this Agreement, make public any reports or articles, or disclose to any third party any confidential information relative to the work of Owner or the operations or procedures of Owner, or any other information specifically designated as confidential by Owner, without the prior written consent of Owner. A-E shall require of its subconsultants similar agreements not to disclose such confidential information.

G. A-E shall, as part of its Basic Services, review laws, codes, and regulations applicable to A-E's services including, without limitation, all DSA

requirements. A-E shall respond in the design of the Project to requirements imposed by governmental authorities having jurisdiction over the Project.

H. A-E shall, as part of its Basic Services, identify the regulatory agencies that have jurisdiction over essential building and design elements and coordinate with and implement the requirements of the regulatory agencies, including without limitation, the California Department of Education, Department of General Services (DGS), DSA Fire/Life Safety, DSA Access Compliance Section, DSA Structural Safety Section, Department of Toxic Substance Control (DTSC), State and Local Fire Marshal and any regulatory office or agency that has authority for review and supervision of school district construction projects.

I. A-E shall, as part of its Basic Services, provide Services required in obtaining any local agencies' approval for off-site work related to each Project including review by regulatory agencies asserting jurisdiction over any part of a Project, including but not limited to water districts, Sacramento County, and utilities (e.g., PGE or SMUD).

J. At its sole cost and expense, and as part of its Basic Services, A-E shall give all notices and comply with all applicable laws, ordinances, rules, regulations, and lawful orders of any public authority bearing on the performance of its work, including those relating to safety of its employees and subconsultants, hazardous materials, and equal employment opportunities; obtain all permits and licenses necessary for performance of its work; pay all local, state, and federal taxes associated with its work; and pay all benefits, insurance, taxes, and contributions for Social Security and Unemployment which are measured by wages, salaries, or other remuneration paid to A-E's employees. Upon Owner's request, A-E shall furnish evidence satisfactory to Owner that any or all of the foregoing obligations have been fulfilled.

K. A-E acknowledges that it has been awarded this Agreement, in part, due to the qualifications, experience, and expertise of Key Personnel identified in A-E's proposal to the Owner for this Agreement and listed on Exhibit B by name. Owner does not intend to award a Service Order unless at least one person listed as Key Personnel in this Agreement, and acceptable to Owner for the specific Service Order, is committed to the Project in the Service Order.

1. During the term of this Agreement, A-E may request in writing that Owner add personnel to its list of Key Personnel. A-E's request shall identify the name, qualifications, and expertise of the proposed Key Personnel and proposed rate, not to exceed the rate of comparable Key Personnel listed in Exhibit B. Owner may request additional information to evaluate the proposed Key Personnel and may negotiate the proposed rate. Owner's decision on any request to add Key Personnel shall be at its absolute discretion.

2. Should any listed Key Personnel no longer be associated with A-E, A-E shall promptly notify Owner, including whether any continuing Key Personnel are expected to substitute for the person to be removed. Upon removal of any Key Personnel, the District may elect to re-evaluate A-E's ongoing qualifications,

including requesting that A-E submit additional information regarding its qualifications, experience, and expertise and/or requesting that A-E propose additional Key Personnel.

ARTICLE 5. INDEPENDENT CONTRACTOR

A-E shall be an independent contractor, and neither A-E nor any employee of A-E or its subconsultants shall be deemed to be an employee of Owner.

Notwithstanding the foregoing, A-E understands that, solely for purposes of conflict of interest under the California Government Code, it may be deemed an "employee" or "officer" of Owner such that A-E or those affiliated with A-E may be precluded from receiving any other contract from Owner related to any Project with respect to which A-E participated in any way in the design, procurement, performance, or other services under this Agreement **unless** the Service Order for the particular Project on which A-E is providing services includes the following language:

A-E's duties and services under this Service Order shall not include preparing or assisting Owner with any portion of Owner's preparation of a request for proposals, request for qualifications, invitation for bids, or any other solicitation regarding a subsequent or additional contract with Owner. Owner shall at all times retain responsibility for contracting, including with respect to any subsequent phase of this Project. A-E's participation in the planning, discussions, or drawing of project plans or specifications shall be limited to conceptual, preliminary, or initial plans or specifications. A-E shall cooperate with Owner to ensure that all bidders for a subsequent contract on any subsequent phase of this project have access to the same information, including all conceptual, preliminary, or initial plans or specifications prepared by A-E pursuant to this Service Order.

ARTICLE 6. CONFLICTS OF INTEREST

A-E affirms that, to the best of its knowledge, no actual or potential conflict of interest exists between family, business, or financial interests of A-E and services under this Agreement. A-E agrees to advise Owner of any actual or potential conflicts of interest that may develop subsequent to the date of execution of this Agreement including, but not limited to, at the time that any Service Order is issued to A-E under this Agreement.

ARTICLE 7. ASSIGNMENT AND SUBCONTRACTING

Except as expressly authorized herein, A-E shall neither assign its rights nor delegate its duties under this Agreement or any Service Order issued hereunder without prior written consent of Owner. This prohibition of assignment and delegation extends to all assignments and delegations that lawfully may be prohibited by agreement.

Except as expressly allowed in this Agreement, A-E shall not subcontract any of the work to be performed or services to be rendered without the prior consent of Owner.

ARTICLE 8. EXTRA SERVICES OF A-E

A. The following services, if necessitated by unusual circumstances and through no fault or neglect on the part of A-E or its subconsultants, shall be paid for by Owner, as provided in Articles 11 and 12. Additional compensation for Extra Services shall be conditioned upon prior receipt of formal written notice from Owner to perform the work as Extra Services and no claim for any additional compensation or reimbursement shall be valid unless so authorized.

1. Plan preparation and/or construction contract administration work on that portion of a Project let on a multiple prime contractor basis, unless the work is administered by a CM. It is understood that the CM may segregate the work into multiple contracts, and, providing that the CM provides for the management of these multiple contracts, this action shall not give rise to Extra Services and shall not result in additional compensation to A-E.
2. Contract administration of the repair of fire or other damage to the Project.
3. The selection by A-E at Owner's request of moveable furniture, equipment, artwork, graphics, signage, or articles that are not included in the Contract Documents.
4. Preparation of additional plans or specifications in order to satisfy the requirements of the applicable public authority, provided that the requirement for these additional documents is the result of changes in policy mandated after completion of the Construction Documents Phase, and that the extra work is not contributed to by the negligence or carelessness of A-E.
5. If directed by Owner, the employment of special consultants or the preparation of special delineations and models.
6. Revisions when inconsistent with approvals or instructions previously given by Owner.
7. Project changes after Owner approval.
8. Services related to Contractor defaults.
9. Providing assistance such as testing, adjusting and balancing in the utilization of equipment or systems and preparation of operation and maintenance manuals.

10. Preparation of construction contract (or Design-Build contract) change orders which necessitate additional work by A-E, provided that the change order and/or extra work of A-E is not contributed to by the negligence or carelessness of A-E. Compensation for Extra Services necessitated by construction change orders shall be pursuant to the hourly fees set forth in Exhibit A. A-E shall keep accurate records of the time spent during construction with respect to such Extra Services and shall provide monthly statements of the same to Owner during construction, identified as to each specific change order item.

B. In no event shall A-E be entitled to receive compensation for Extra Services if required as a result of A-E's or its subconsultants' errors, omissions, or failure to perform in accordance with this Agreement.

ARTICLE 9. OWNER'S RESPONSIBILITIES

A. In the Service Order, the Owner shall provide full information as to the requirements of the Project, including realistic budget limitations and scheduling for the Project.

B. Owner shall furnish, or direct A-E to procure, at Owner's expense, chemical, mechanical, or other tests required for proper design and borings or test pits necessary for determining subsoil conditions.

C. Owner shall furnish available as-built drawings of existing structures.

D. Owner shall furnish all inspection and testing services in conjunction with the Project.

E. Owner shall furnish all legal advice and services required for the Project.

F. Owner shall notify A-E of administrative procedures required and name a representative authorized to act in its behalf. Owner shall promptly render decisions pertaining thereto to avoid unreasonable delay in the progress of the Project.

G. Owner shall provide a complete Division 0 and Division 1 package for inclusion in the Contract Documents other than Design-Build contracts, as well as the site and facilities leases for lease-leaseback projects. For Design-Build Projects, Owner shall prepare the Design-Build agreement, including its general conditions, and the Design-Build solicitation documents.

H. Owner shall periodically update the Project Budget, including that portion allocated for the Construction Budget.

I. Owner shall provide hazardous materials consultant services for the project, if required. If hazardous materials specifications are part of the project manual, Owner shall assume responsibility for their accuracy and completeness and full liability for work done under said specifications.

J. During the Contractor's guarantee period, Owner shall notify A-E in writing of any apparent deficiencies in materials or workmanship.

ARTICLE 10. ESTIMATE OF PROJECT CONSTRUCTION COSTS (PROJECTS OTHER THAN DESIGN-BUILD OR SPECIALTY PROJECTS ONLY)

A. Estimates referred to in Article 2 shall be prepared in a format acceptable to Owner, providing the appropriate level of detail for the phase of Project development, and shall be in accordance with Exhibit E. The format will typically be a Construction Specifications Institute breakdown by building and sitework, unless otherwise directed by Owner. Estimates shall consider prevailing construction costs and include all work for which bids will be received. It is understood that the Project Construction Cost is affected by the labor and/or material market, as well as conditions beyond the control of A-E or Owner.

B. A-E shall provide the Estimate at each phase of its services and compare the Estimate with the Construction Budget. If such Estimates are in excess of the Construction Budget, A-E shall prepare a report identifying and explaining any variances and, as part of its Basic Services, shall develop revisions with the Owner's approval to the type or quality of construction to bring the Estimate within the Construction Budget.

C. In the case of design-bid-build projects, if the lowest responsive base bid exceeds the Project Construction Cost in the approved Construction Budget by ten percent (10%) or more, A-E shall, at Owner's option and at no additional cost to Owner, revise the preliminary and/or final design in such ways as Owner may approve so as to bring the cost of construction within five percent (5%) of the approved budget limit. Any reprocurement costs in such event shall be part of the Basic Services, and A-E shall not be entitled to additional compensation for such services.

D. In the case of lease-leaseback projects with preconstruction services to be provided by the lease-leaseback provider, A-E shall work with the lease-leaseback provider to revise the preliminary and/or final design in such ways as the Owner may approve so as to bring the cost of construction to an amount acceptable to the Owner. If preconstruction services are not provided by the lease-leaseback provider, the provisions of Article 10.C apply.

ARTICLE 11. ARCHITECT-ENGINEER COMPENSATION

A. Professional Services: A-E agrees to perform professional services provided by this Agreement, and Owner agrees to pay A-E for such services in accordance with the fees set forth in the Service Order, which shall not exceed the fees set forth in the attached Exhibit B, subject to any escalations set forth in Exhibit B. A-E's compensation for Extra Services shall be calculated as provided in paragraph F, below.

B. Reimbursable A-E Costs/Expenses: Owner recognizes that certain costs and expenses associated with the professional services performed are reimbursable to A-E. Provided that A-E obtains Owner's prior written approval, costs and expenses will be reimbursed to A-E. Owner's prior written approval is an express condition precedent to any reimbursement to A-E of such costs and expenses, and no claim for any additional compensation or reimbursement shall be valid absent such prior written approval by Owner.

C. The following are descriptive categories of work that may be considered for reimbursable costs, provided Owner issues its written approval before the costs are incurred:

1. Expenses of Outside Technical Assistance deemed necessary.
2. Approved reproduction of drawings and specifications in excess of the copies required by this Agreement, at rates prevailing in the community for bulk reproduction, or at other rates approved in advance by Owner.
3. Approved fees advanced for securing approval of authorities having jurisdiction over the Project.
4. Additional insurance coverage above those coverages identified in Article 16.

D. Reimbursement shall be at cost for reproductions, fees advanced and additional insurance. Reimbursement for items requiring coordination by A-E shall be reimbursed at one hundred ten percent (110%) of the direct billing.

E. Payments to A-E for reimbursable costs/expenses will be made only after the specific costs/expenses have been incurred and invoicing has been verified by submission of substantiating documentation, such as copies of paid invoices or other documentation confirming that such costs/expenses have been incurred by A-E. All charges incurred under this Agreement shall be due and payable within thirty (30) days of approval of the invoice. Disputed invoices shall be returned to A-E within ten (10) working days of receipt.

F. For payments to A-E for Extra Services under Article 8, the parties agree as follows:

1. Hourly fees shall be per the Service Order, which shall not exceed the fees in Exhibit B, subject to any escalations set forth in Exhibit B.
2. One hundred ten percent (110%) of the direct billings of consultants performing authorized Extra Services.

ARTICLE 12. PAYMENTS TO THE ARCHITECT-ENGINEER

A. General

1. A-E shall submit one (1) invoice monthly to the Owner for the fee associated with the Services performed, with detailed backup; reimbursable expenses, if any; and Extra Services, if any, incurred for the billing period. Invoices requesting reimbursement for expenses incurred during the billing period must clearly list items for which reimbursement is being requested and be accompanied by proper documentation (e.g. receipts, invoices) including a copy of Owner's authorization notice for invoiced item(s). Invoices requesting payment for Extra Services must reflect hours being charged and a copy of Owner's authorization notice. No payments will be made by the Owner to A-E for monthly invoices requesting reimbursables or Extra Services absent the prior written authorization of the Owner. All charges incurred under this Agreement shall be due and payable within thirty (30) days of approval of the invoice.

2. Payments for Extra Services provided under Article 8 shall be made monthly, in arrears, as services are rendered and expenses incurred.

3. In the event of delayed completion, and except as provided elsewhere in this Agreement or the Service Order, A-E's compensation shall be paid at the time and in the amount noted. A-E shall not be entitled to additional compensation for Services as a result of the delay to the Project caused by A-E's errors or omissions.

4. Owner may withhold, or on account of subsequently discovered evidence nullify, the whole or a part of any payment to such extent as may be necessary to protect Owner from loss, including costs and attorneys' fees, on account of (1) defective or deficient work product not remedied; (2) failure of A-E to make payments properly to its employees or subconsultants; or (3) failure to adhere to the Project schedule or to achieve sufficient progress with the Services such that A-E is unlikely to achieve timely completion.

B. Design-Build Project or Specialty Project

Except as may be modified in any Service Order, payments on account of the agreed compensation in Article 11 shall be in accordance with A-E's Proposal, Exhibit B hereto.

C. Project Other Than Design-Build or Specialty Project

Except as may be modified in the Service Order, payments on account of the agreed compensation in Article 11 shall be:

1. Schematic Design Phase—fifteen percent (15%) of total compensation stated in Exhibit A. Billings shall be monthly or lump sum, in

arrears, up to fifteen percent (15%) of the total compensation, based upon work completed.

2. Design Development Phase—increase to thirty percent (30%) of total compensation stated in Exhibit A. Billings shall be monthly or lump sum, in arrears, up to thirty percent (30%) of the total compensation, based upon work completed.

3. Construction Documents Phase

a) Construction Documents sufficiently complete to be and actually submitted for review by the Division of the State Architect—increase to sixty percent (60%) of the total compensation stated in Exhibit A. Billings shall be monthly or lump sum, in arrears, up to sixty percent (60%) of total compensation, based upon work completed.

b) Construction Documents one hundred percent complete, fully coordinated and quality-controlled by A-E and submitted to Owner for peer review—increase fee to sixty-five percent (65%) of the total compensation stated in Exhibit A.

c) Review comments from third-party peer review (retained under separate contract to Owner) incorporated into documents and construction documents approved by the Division of the State Architect—increase fee to seventy percent (70%) of the total compensation stated in Exhibit A.

4. Construction Phase

a) On all or that portion of the Project for which bids have been received and contracts awarded - increase to seventy-two percent (72%) percent of total compensation. Delay in the award of the contract shall not affect A-E's compensation unless additional services are required.

b) Subsequent billings shall be submitted monthly, in arrears, in proportion to the percentage of work certified complete by A-E in response to construction progress payment requests. (Billings shall show, as a separate line item, site visit hours used that month by AE and its subconsultants, total used to date and hours remaining.)

c) Construction complete and accepted by Owner - increase to ninety-five percent (95%) of the total compensation.

d) Project documentation, including, without limitation, record documents, forwarded to Owner and the applicable governmental agencies having jurisdiction—increase to one hundred percent (100%) of the total compensation, notwithstanding A-E's services during the

Contractor's guarantee period. Owner expects that the required documents (independent of Owner requirements) will be filed within sixty (60) days of Project acceptance.

ARTICLE 13. DEFAULT AND TERMINATION OF AGREEMENT

A. A-E Default: A-E shall be in default if A-E at any time refuses or neglects to prosecute its work in a timely fashion or in accordance with the Project schedule; or is adjudicated as bankrupt; or commits any act of insolvency; or makes an assignment for the benefit of creditors without Owner's consent; or fails to make prompt payment to persons furnishing labor, equipment, or materials; or fails in any respect to properly and diligently prosecute its work; or becomes delinquent with respect to contributions or payments required to be made to any employee benefit programs or trust; or otherwise fails to perform fully any and all of the agreements herein contained.

B. Cure: If A-E fails to cure the default within seven (7) days after written notice thereof, Owner may, at its sole option, take possession of any documents, files (including electronic files), and other materials prepared or used by A-E in connection with the Project(s); provide any such work, labor, or materials to another design professional as may be necessary to overcome the default; and deduct the cost thereof from any money then due or thereafter to become due to A-E under a Service Order issued under this Agreement.

C. Default Termination: In the event Owner elects to terminate a Service Order or this Agreement due to A-E default, Owner shall have the right to immediate possession of all plans, specifications, and other work in progress prepared by A-E, whether located at the Project, at A-E's place of business, or at the offices of a subconsultant, and may employ any other person or persons to finish the Basic Services and provide the materials therefor. In case of such default termination, A-E shall not be entitled to receive any further payment under a Service Order issued under this Agreement until the Project is completely finished. At that time, if the unpaid balance of the amount to be paid under the Service Order exceeds the expenses incurred by Owner in finishing the Project, such excess shall be paid by Owner to A-E, but, if such expenses shall exceed such unpaid balance, then A-E shall promptly pay to Owner the amount by which such expenses exceed such unpaid balance. The expenses referred to in the last sentence shall include expenses incurred by Owner in causing the services called for under the Service Order to be provided by others, for attorneys' fees, and for any damages sustained by Owner by reason of A-E's default or defective work, plus a markup of ten percent (10%) on any and all such expenses.

D. Owner Default: A-E may terminate a Service Order issued under this Agreement for cause upon seven (7) days' written notice to Owner for any of the following reasons: (1) Owner fails to timely pay undisputed sums due to A-E; (2) Owner assigns this Agreement or Service Order or transfers ownership of the Project prior to completion of A-E's services under the Service Order if the assignment or transfer is made without the prior written consent of A-E; or (3) Owner suspends the Project or A-E's services for more than 180 consecutive days. Owner shall have the right to cure

the stated ground for termination within the seven (7) day notice period, which may include identifying grounds on which any unpaid amounts are disputed and/or properly withheld and/or otherwise are not yet due to Architect. In the event of cure, A-E's notice shall become null and of no further force or effect.

E. Termination for Convenience. In addition to the foregoing right to terminate for default, Owner reserves the absolute right to terminate this Agreement and/or any Service Order issued hereunder without cause, for any reason whatsoever, upon thirty (30) days' written notice to A-E. In the event of such a termination without cause, Owner shall have the right to immediate possession of all plans, specifications, and other work in progress prepared by A-E, whether located at the Project, at A-E's place of business, or at the offices of a subconsultant, and may employ any other person or persons to finish the design work and provide the materials therefor. Also in the event of such a termination without cause, A-E shall be entitled to payment in an amount not to exceed the contract price which shall be calculated as follows: (1) Payment for any phase of the work then satisfactorily completed and accepted by Owner, according to the percentages set forth in Article 12 (if applicable); plus (2) Reimbursable Costs actually incurred by A-E in connection with performance according to Article 11; plus (3) a portion of the percentage applicable to a phase which is in progress, which bears the same ratio to the total amount to be earned for that phase as the work then completed in that phase bears to the total work to be accomplished in that phase, plus (4) reasonable termination expenses. There shall be deducted from such sums as provided in this section the amount of any payment made to A-E prior to the date of termination of this Agreement or Service Order issued hereunder. A-E shall not be entitled to any claim or lien against Owner or the Project for any additional compensation or damages in the event of such termination and payment. In addition, Owner's right to withhold funds under Article 12.F shall be applicable in the event of a termination for convenience.

F. Saving Clause: If this Agreement or any Service Order hereunder is terminated by Owner for default and it is later determined that the default termination was wrongful, such termination automatically shall be converted to and treated as a termination for convenience under this Article and A-E shall be entitled to receive only the amounts payable hereunder in the event of a termination for convenience.

G. Survival of Obligations: No termination of this Agreement or any Service Order hereunder shall excuse or otherwise relieve A-E of its responsibilities under this Agreement, including, without limitation, the standard of care for its work and services, with respect to any work and/or services performed prior to the date of termination and any work that survives the termination. All of A-E's responsibilities under this Agreement with respect to work and/or services performed prior to the date of termination shall survive any termination.

ARTICLE 14. PERFORMANCE TIME SCHEDULE

A. Upon receipt of a Service Order, A-E shall prepare and submit for Owner approval a schedule for the performance of A-E's services. This schedule shall include

reasonable allowances for review and approval times required of Owner, performance of services by Owner's consultants, and review and approval times required by public authorities having jurisdiction over the Project. This schedule shall be equitably adjusted as the Project progresses, allowing for changes in scope, character, or size of the Project requested by Owner, or for delays or other causes beyond A-E's reasonable control.

B. A-E shall respond to the following specific items within the time frames indicated below:

1. Requests for Information: 3 days
2. Change order requests: 7 days
3. Submittals 14 days

C. In the event A-E fails to perform its obligations under this Agreement and/or under the Service Order within the times specified in the approved schedule for its work and thereby delays the Project, Owner may withhold payments until all work within the particular phase at issue is completed or the schedule for A-E's work has been recovered. This remedy shall be in addition to, and not in derogation of, Owner's other rights and remedies relating to A-E's default, whether under this Agreement or applicable law.

ARTICLE 15. RECORDS OF THE ARCHITECT-ENGINEER; AUDIT

A. Records of A-E's direct personnel and reimbursable expenses pertaining to any Extra Services on a Project and records of accounts between Owner and Contractor shall be kept on a generally recognized accounting basis and shall be available to Owner or its authorized representative at mutually convenient times.

B. Owner or the Owner's authorized representative shall have access, upon reasonable notice, during normal business hours, to any plans, specifications, books, documents, accounting records, papers, project correspondence, project files, and other records of A-E and/or its subconsultants directly or indirectly related to a Project. Such access shall include the right to examine and audit such records and make excerpts, transcriptions, and photocopies at Owner's expense.

C. A-E shall maintain all records in connection with any Service Order for at least four (4) years following completion of the work under the Service Order, or any longer time as may be required by law. Records may be maintained electronically, so long as they are reasonably accessible upon request by Owner.

ARTICLE 16. INSURANCE TO BE CARRIED BY ARCHITECT-ENGINEER

A-E shall procure and maintain insurance at all times on all of its operations during the term of this Agreement and for five (5) years following completion of the last Service

Order issued to it, the following minimum insurance coverages. This requirement includes, but is not limited to, A-E's obligation to maintain Professional Liability Coverage (Errors & Omissions).

Certificates of Insurance and required endorsements, including but not limited to Additional Insured Endorsements and Waivers of Subrogation on each policy in favor of Owner, the Construction Manager, and each of their officers, officials, directors, trustees, agents, employees and volunteers shall be delivered to Owner within ten (10) days of execution of this Agreement by Owner. Endorsements with expiration dates will not be accepted.

No Service Order will be awarded without the required Certificates of Insurance and current endorsements having been submitted and accepted by Owner. Owner may request updated endorsements including Owner's consultants and their officers, officials, directors, trustees, agents, employees and volunteers as Additional Insureds in connection with any Service Order.

If Owner requests copies of the Insurance Policy or Policies, A-E agrees to provide certified copies within 30 days of Owner's request.

All policies required hereunder shall be endorsed or shall provide in the policy form that the policy shall not be cancelled, materially reduced, or non-renewed without thirty (30) days prior written notice to Owner (ten [10] days for non-payment of premium).

Any and all deductibles shall be assumed by and at the sole risk of A-E. Any deductibles over \$50,000 must be declared to and approved by Owner.

Failure of A-E to maintain all required insurance during the entire period required hereunder shall constitute a default entitling Owner to all rights and remedies that exist under this Agreement and/or by law. Furthermore, any failure to comply with the reporting provisions of the policy shall not affect coverage provided to the Owner.

The insurance required in this Agreement shall be with carriers and on forms acceptable to Owner and shall be subject to the approval of Owner. With the exception of insurance provided by The State Compensation Insurance Fund of California, insurance is to be placed with insurers authorized to transact insurance business in California and with a Bests' rating of no less than A- VII. Any acceptance of insurance certificates by Owner shall in no way limit or relieve the A-E of the duties and responsibilities in this agreement.

Should A-E or any of their subconsultants maintain broader coverage and/or limits than those listed in this contract, those coverages/limits are hereby required and shall be made available to Owner. Limits may be reduced to the Agreement minimum amounts with Owner's approval.

A. Workers' Compensation and Employers' Liability Insurance.

In accordance with the provisions of Section 3700 of the Labor Code, A-E and each subconsultant, shall secure the payment of compensation to its employees. A-E shall purchase and maintain Workers' Compensation insurance with minimum Employer's Liability limits of \$1,000,000, covering all workplaces and employees involved in this agreement.

A-E shall sign and file with Owner a certificate in the following form:

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

A-E shall furnish a certificate of insurance or a certificate of permission to self-insure under the Workers' Compensation and Employers' Liability Insurance statutes of the State of California.

B. General Liability Insurance.

1. Coverage shall be on Occurrence form (ISO CG 00 01 or equivalent) covering all operations by or on behalf of A-E and not excluding coverage for:
 - a. Premises and Operations
 - b. Products and Completed Operations
 - c. Contractual Liability insuring the obligations assumed by the A-E in this Agreement and any Service Order issued hereunder
 - d. Broad Form Property Damage (including Completed Operations)
 - e. Explosion, Collapse, Subsidence, and Underground Hazards
 - f. Personal Injury Liability
2. Commercial General Liability Limits shall not be less than:

\$2,000,000 Each Occurrence (Combined Single Limit for Bodily Injury & Property Damage)

\$2,000,000 Personal Injury Liability Each Occurrence

\$4,000,000 Aggregate for Products and Completed Operations

\$4,000,000 General Aggregate
3. Coverage shall apply on a primary and non-contributory basis and any insurance, self-insurance, or Memorandum of Liability Coverage maintained by Owner shall not be called upon to contribute to any loss.

C. Commercial Automobile Liability. Insurance policy (ISO CA 00 01 or equivalent) covering Bodily Injury, Property Damage, and Contractual Liability coverage for "Any Auto" (Symbol 1) which includes coverage for any owned, hired, borrowed and non-owned automobile, trailer, and equipment coverage, with combined

single limit of not less than \$1,000,000. Said policy shall be on a primary and non-contributory basis.

D. Excess Liability. A-E shall have in place an Umbrella or Excess Liability Policy in the amount of \$1,000,000. The policy shall be "Following Form" in excess of the above captioned policies and Workers' Compensation Employer's Liability. Evidence of this coverage shall be provided on the certificate of insurance.

E. Professional Liability. As a condition precedent to A-E performing any operations under the Agreement, A-E shall obtain at its own expense Professional Liability (Errors & Omissions) coverage to protect, defend, and hold harmless Owner and its officers, officials, directors, trustees, agents, employees, and volunteers from all claims arising out of the professional services provided by A-E under this Agreement, including any Service Order issued hereunder. This policy also shall provide coverage for the acts and omissions of A-E's entire design team for any Service Order. A-E's policy shall have limits of not less than \$2,000,000 per claim.

- For work performed under Article 3A, BASIC SERVICES OF A-E: DESIGN-BUILD PROJECTS, or similar work performed under paragraph 3C, BASIC SERVICES OF A-E: SPECIALTY PROJECTS, the following policies limits are required:
 - Project values between \$10 million and \$25 million: \$5,000,000 per claim
 - Project values above \$25 million: subject to review by SJUSD
- For work performed under Article 3B, BASIC SERVICES OF A-E: PROJECT OTHER THAN DESIGN-BUILD, or similar work performed under paragraph 3C, BASIC SERVICES OF A-E: SPECIALTY PROJECTS, the following policies limits are required:
 - Project values between \$5 million and \$10 million: \$5,000,000 per claim
 - Project values between \$10 million and \$25 million: \$10 million per claim
 - Project values above \$25 million: subject to review by SJUSD
- Project value shall be calculated as follows:
 - Design-Build: Value of the Design-Build contract
 - Other than Design-Build: Value of the Construction Budget
- SJUSD reserves the right to amend the requirements above if other Project considerations, or lack of, are present that affect SJUSD's risk.

F. Subconsultant's Insurance. With the exception of Professional Liability (E&O) policy limits, A-E shall require each and every subconsultant to maintain insurance coverages commensurate with that which is required of the A-E in this Article 16 and shall incorporate these insurance requirements into each subconsultant agreement. This includes, but is not limited to, the Additional Insured and Waiver of Subrogation provisions.

In addition, on Projects that are not covered by a primary project-specific Professional Liability Insurance policy, subconsultants that have any element of design responsibility must carry Professional Liability Insurance in the amount of at least \$2,000,000 per claim. Where a primary project-specific policy is required or provided, subconsultants are not required to maintain Professional Liability insurance in connection with the Project. The Owner may approve a variation in foregoing insurance requirements, upon a determination that coverage, scope, limits and/or forms of such insurance are either not commercially available or that Owner's interests are otherwise fully protected.

A-E shall not allow any subconsultant to commence work on its subcontract until the subconsultant has provided A-E with Certificates of Insurance and applicable endorsements as well as the signed statement acknowledging compliance with Section 3700 of the Labor Code, as required in Paragraph A of this Article 16. It shall be the responsibility of A-E to ensure that all subconsultants comply with this provision, and to verify their compliance when requested by Owner.

If requested by Owner, A-E shall deliver certificates of insurance or copies of the insurance policies and endorsements of all subconsultants; provided, however, that this authority shall not relieve A-E of its obligation to ascertain the existence of such insurance.

ARTICLE 17. REPRODUCTION OF DOCUMENTS

A. A-E shall provide, at no expense to Owner, copies of the following: (a) for Projects other than Design-Build, preliminary plans and construction documents for the review and approval of Owner at end of schematic design, design development, Construction Document, DSA submittal, and completed and quality-controlled sets for constructability review or (b) for Design-Build, the preliminary and final Performance Criteria documents. Owner's requirement is one (1) reproducible master for each item plus three (3) print sets; state agency requirements to be determined and provided by A-E, including any electronic media in a format acceptable to the agencies.

B. For Projects other than Design-Build, A-E shall provide one (1) reproducible master and one (1) electronic master in AutoCAD (most current version) compatible format for drawings, and one (1) copy in the most current version of Microsoft Word of the final approved Contract Documents for bidding and construction purposes.

C. For Design-Build Projects, A-E shall provide one (1) copy in the most current version of Microsoft Word of the final approved Performance Criteria.

ARTICLE 18. RECORD DOCUMENTS (PROJECTS OTHER THAN DESIGN-BUILD ONLY)

A. At completion of each Project (or any portion that is constructed as a distinct unit), A-E shall prepare Record Documents and furnish to the Owner one (1) Electronic Copy set of record drawings, one (1) set of electronically marked-up specifications and media showing materials and methods of construction as actually accomplished. The Record Documents shall be prepared by revision of the original drawings using Contractor's and Project Inspector's marked-up record set and any project documents (including but not limited to, Addenda, DSA CCD's, Field Clarifications, Requests for Information, Architect Supplemental Instructions, Construction Change Directives/Contingency Draw Authorizations, and other similar documents) necessary to reflect all changes in the Record Documents and specifications as incorporated into the Project. A-E shall return to Owner the Contractor's and Project Inspector's original marked-up record set (if hard copy used, provide the hard copy along with a scanned copy of same documents) along with the following deliverables:

1. Electronic copy (.pdf) of entire bid set (specifications and drawings, as applicable), including any addenda issued. The electronic copy shall be transmitted electronically to Owner's archives department, though the CM, if any, and shall be sent with a return receipt requested. If A-E does not receive a return receipt or other confirmation of receipt from within two (2) business days of sending the copy, A-E shall follow up to confirm that the files were received.
2. Electronic copy (.pdf) of contractor as-built drawings ("Protection Set"). Prior to scanning, the drawings shall be approved, signed, and dated by the Project Inspector. Drawings shall be scanned in color.
 - a) The Protection Set shall have proper revision clouds indicating areas that were revised and the source of each revision, e.g., RFI #, AB #, etc.
 - b) In coordination with the Owner and the CM, verify that all approved project documents (e.g., RFIs, ABs, ASIs, CCD, etc.) are scanned and that each of these documents is consolidated into the appropriate, clearly-marked sub-folder and forwarded to CM, if any, and to Owner's archives department.
 - c) Files transmitted electronically shall be sent either by e-mail with a return receipt requested or personally delivered to the CM, if any, and to the Owner's archives department. If electronic copies are sent by e-mail and A-E does not receive a return receipt or other confirmation of

receipt within two (2) business days of sending the copy, A-E shall follow up to confirm that the files were received.

3. One electronic copy of Record Documents to the following standards, delivered on CD-R:

- a) Drawing standards such as linetypes, linewidths, fonts and symbols shall be consistent with the DSA approved set;
- b) Include text "Record Drawing" on all sheets;
- c) Remove all revision deltas and clouds on all sheets;
- d) List DSA approval date on all sheets;
- e) List DSA application number on all sheets;
- f) Identify appropriate design team company name on corresponding sheets;
- g) AutoCAD files shall adhere to the following standards:
 - i) Full drawing package in AutoCAD v2010 executable dwg format;
 - ii) Include all fonts and plotting linewidths;
 - iii) Organize dwgs into folders by discipline; and
 - iv) Include all cross-references; and
- h) Complete Specification book(s) with all revised pages inserted.

ARTICLE 19. OWNERSHIP OF DOCUMENTS AND RE-USE OF DOCUMENTS

A. Owner acknowledges that the A-E Performance Criteria (for Design-Build) or construction documents (other than Design-Build), including electronic files, are instruments of professional service. Nonetheless, the plans, specifications, estimates, programs, reports, models, and other material prepared by or on behalf of A-E under this Agreement and any Service Order issued hereunder (collectively the "Documents") shall be and remain the property of Owner, pursuant to Section 17316 of the Education Code, whether the Project is completed or not. All Documents shall be delivered to Owner on the earlier of (1) sixty (60) days after Owner's Notice of Completion of the Project, or (2) the date of termination of this Agreement or Service Order for any reason prior to final completion of the Project. The Documents may be reproduced and/or used by Owner and its agents, employees, representatives, and assigns, in whole or in part, or in modified form, for all purposes Owner may deem advisable in connection with completion and maintenance of, and additions, modifications to, or modernizations of the Project, without further employment of or payment of any compensation to A-E;

provided, however, that if this Agreement or Service Order is terminated for any reason prior to completion of the Project and if under such circumstances Owner uses, or engages the services of and directs another A-E to use, the Documents to complete the Project, Owner agrees to release A-E from any responsibility for the conformance of the incomplete portions of the Project to the Documents and to hold A-E harmless from any and all liability, costs, and expenses (including reasonable legal fees and disbursements), relative to claims arising out of matters and/or events which occur subsequent to the termination of this Agreement or Service Order as a result of causes other than the fault or negligence of A-E, or anyone for whose acts it is responsible.

B. Except as otherwise permitted in this Agreement or any Service Order issued hereunder, Owner shall not assign, delegate, sublicense, pledge or otherwise transfer the right to use and re-use the Documents to any other party without the prior written authorization of A-E. However, in addition to the rights to use and re-use the Documents as set forth in this Article 19, Owner shall be permitted to authorize design-builders, lease-leaseback providers, Contractors or any construction subcontractors, equipment suppliers or material suppliers to use and reproduce, to the fullest extent necessary, applicable portions of the Documents appropriate to and for use in their work.

C. In the event Owner ever desires to construct all or part of another wholly unrelated project which would be essentially identical in design to the Project that is the subject of a Service Order, A-E agrees to permit re-use of its design and the corresponding contract documents, subject to payment to A-E of a fair and reasonable re-use fee.

D. Any unauthorized re-use of the Documents shall be at Owner's sole risk and without liability to A-E. Owner agrees to indemnify and hold harmless A-E and its subconsultants against any damages, liabilities, or costs, including reasonable legal fees and disbursements, arising from the unauthorized re-use or modification of the Documents. Submission or distribution of the Documents to meet official regulatory requirements or for similar purposes does not constitute an unauthorized re-use of the Documents.

E. A-E shall not re-use the Documents without the prior written consent of Owner. Any unauthorized re-use of the Documents by A-E shall be at A-E's sole risk and without liability to Owner. A-E agrees to indemnify and hold harmless Owner against any damages, liabilities or costs, including reasonable legal fees and disbursements arising from the unauthorized re-use of the Documents.

ARTICLE 20. NOTICE OF CLAIMS AND DISPUTE RESOLUTION

A. A/E shall give written notice of any claims arising out of or relating to this Agreement or any Service Order issued hereunder within three (3) business days of the event(s) giving rise to the claim. Said written notice shall specify the nature, amount and basis of the claim and shall be certified under penalty of perjury and in compliance with the California False Claims Act, as set forth below. Failure to include these

required certifications shall constitute grounds for rejection of the claim. Failure to provide notice of the claim within the time limit set forth herein shall constitute grounds for rejection of the claim.

B. Direct Negotiation will be the initial process utilized by the parties after issuance of written notice of any claim arising out of or relating to this Agreement or Service Order as specified immediately above. Either the Owner or A-E may make a request for Direct Negotiations as an initial attempt to resolve any claim, dispute, or other matter arising out of this Agreement or Service Order. Direct Negotiation representatives of the parties shall be the Owner's designated representative and the A-E's designated representative. Any requested Direct Negotiation will take place at the Project or at a mutually agreeable location specified by the parties' designated representatives, and the Direct Negotiations shall take place as soon as reasonably practical after the request for Direct Negotiation. The parties shall negotiate in good faith in an effort to resolve the claim, dispute, or other matter arising out of the Agreement. Each party shall document the results of the Direct Negotiation and these documents shall be exchanged between the parties.

C. Mediation. The parties agree that all claims, disputes or controversies between the parties arising out of or relating to this Agreement or any Service Order, or breach thereof, initially shall be submitted to non-binding mediation before a mediator mutually agreed upon by the parties. In the event the parties are unable to agree on a mediator within fifteen days from the date either party submits a written request to mediate a claim, dispute, or controversy, the mediator shall be selected and the mediation administered under the Construction Mediation Rules of the American Arbitration Association. The costs and fees of the mediator shall be paid equally by the parties. The parties shall negotiate in good faith in an effort to reach an agreement with respect to the claim, dispute, or controversy. Neither party shall commence or pursue arbitration or litigation until the completion of mediation proceedings.

D. Venue. Any arbitration or any judicial proceeding shall be brought and heard in Sacramento County.

E. It is expressly agreed that no mediation or arbitration shall be initiated prior to the completion of the Project or termination of this Agreement or the Service Order, whichever is earlier.

F. Claim certification: A-E acknowledges that it has read and is familiar with the provisions of the California False Claims Act (California Government Code sections 12650 *et seq.*). Submission by A-E of a claim (as the term "claim" is defined in the False Claims Act) to Owner in connection with a Project, whether on its behalf or on behalf of a subconsultant, shall constitute a representation by A-E to Owner that submission of the claim does not in any respect violate the California False Claims Act. Any party with an interest in the claim, including any subconsultant(s), shall certify under penalty of perjury the validity and accuracy of any claim submitted to Owner, as provided below. Compliance with this claim certification requirement is a condition

precedent to any obligation Owner might otherwise have to review the claim, and failure to provide such certification shall constitute a waiver of the claim. The claim certification required by this paragraph shall provide as follows:

CLAIM CERTIFICATION

Under penalty of perjury, and with specific reference to the California False Claims Act, Government Code sections 12650, *et seq.*, I certify that submission of the attached claim is made in good faith; that the supporting data prepared by the undersigned company is accurate and complete to the best of my knowledge and belief; that submission of the claim to Owner does not violate the California False Claims Act; and that I am duly authorized to certify the claim on behalf of claimant.

Dated: _____

Company _____

By _____
[Name and Title]

Signature

ARTICLE 21. SUCCESSORS AND ASSIGNS

This Agreement and all Service Orders issued hereunder shall be binding upon Owner and its successors and upon A-E, its partners, successors, executors, and administrators. Neither this Agreement, nor any Service Order, nor any monies due or to become due thereunder, may be assigned by A-E without the consent and approval of Owner.

In particular, A-E acknowledges that this Agreement was awarded based on a competitive process in which A-E's Key Personnel, experience, expertise, competence, and other aspects of its business were considered in selecting A-E to receive an award. As a result, if A-E's business materially changes, such as by a significant increase or decrease in size, by being acquired by or merging with another entity, by loss of Key Personnel, by change in local or primary office location, or otherwise, the Owner will evaluate whether to continue this Agreement with the changed A-E entity. The Owner may require A-E to submit documentation of its experience and expertise in connection with such review. The decision whether to continue this Agreement with A-E will be made in Owner's sole and absolute discretion.

ARTICLE 22. INDEMNITY

A. A-E shall, with respect to all work which is covered by or incidental to this Agreement or Service Order issued hereunder, defend, indemnify, and hold harmless Owner, its officers, directors and employees (collectively "Owner"), from and against any and all liens and claims asserted by firms or individuals claiming through A-E, and

claims, liability, loss, damage, costs, or expenses, including reasonable attorneys' fees, expert's fees, awards, fines, or judgments, relating to the death or bodily injury to persons, injury to property, design defects, or other loss, damage, or expense to the extent that any of the above that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of A-E. A-E's duty shall include the duty to defend the indemnitees as required by Civil Code section 2782.8. However, A-E shall not be obligated under this Agreement or any Service Order to indemnify Owner to the extent that the damage is caused by the active or sole negligence or willful misconduct of Owner or its agent or servants other than A-E.

B. A-E shall indemnify, defend, and hold Owner harmless against any claim, suit, or action, or any alleged violation or infringement of patent rights, copyrights, or other intellectual property rights which may be made against Owner by reason of the use in connection with or as a part of the Project anything which is now or may hereafter be covered by patent, copyright, trademark, or other intellectual property rights, and also against all expenses, including attorneys' fees and expert witness' fees, which Owner may incur in defending or adjusting any such claim, suit, or action.

C. In no event shall A-E's cost to defend exceed A-E's proportionate percentage of fault. However, notwithstanding the foregoing sentence, in the event one or more defendants is unable to pay its share of defense costs due to bankruptcy or dissolution of the business, A-E shall meet and confer with the other parties regarding the unpaid defense costs.

D. Owner shall defend, indemnify and hold harmless A-E, its officers, directors, employees and subconsultants (collectively "A-E") from and against any and all claims, liability, loss, damage, costs or expenses, including reasonable attorneys' fees, expert's fees, awards, fines or judgments, to the extent caused by Owner's negligent acts, errors or omissions in the performance of its obligations under this Agreement or any Service Order issued hereunder. Owner's duty shall include the duty to defend the indemnitees as required by Civil Code section 2782.8. However, Owner shall not be obligated under this Agreement or any Service Order to indemnify A-E to the extent that the damage is caused by the negligence, recklessness, or willful misconduct of A-E or its agents or servants other than Owner.

E. A-E and Owner each agree to promptly serve notice on the other party of any claims arising hereunder, and shall cooperate in the defense of any such claims.

F. The acceptance by Owner or its representatives of any certificate of insurance providing for coverage of any kind shall in no event be deemed a waiver of any of the provisions of this Article 22. None of the foregoing provisions shall deprive Owner or A-E of any action, right or remedy otherwise available by law.

ARTICLE 23. ADDITIONAL PROVISIONS

A. The furnishing of available as-built drawings of existing structures is the responsibility of Owner.

B. Environmental Impact Reports and/or similar studies are not included in this Agreement and, if required, will be specified in the Service Order and paid for by Owner.

C. By executing this Agreement, A-E confirms the representation made in its proposal that it is not subject to Russian Sanctions. In addition, with each Service Order, A-E will be required to sign the Certification Regarding Russian Sanctions in substantially the form attached hereto as Exhibit I, as that form may be revised by the time the Service Order is issued.

ARTICLE 24. FINGERPRINTING

Education Code Section 45125.1 shall apply to this Agreement unless expressly excluded by any Service Order. The Owner's administrator initiating and/or responsible for this Agreement shall, pursuant to section 45125.1 and Owner policy and guidelines, determine whether fingerprinting is required of A-E and/or its employees prior to issuing any Service Order. Once such determination is made, the administrator shall verify his/her determination on the signature page of the Service Order. If the Administrator concludes fingerprinting is required, the following shall apply:

A. The A-E shall, prior to commencement of work pursuant to the Service Order, require any person affiliated with A-E (or, in appropriate cases, him or herself) to be fingerprinted by the Department of Justice (DOJ) if that person will have unsupervised access to school campuses. Upon verification from DOJ that those persons fingerprinted have no record of a serious or violent felony, A-E will so certify by signing and submitting the A-E Certification attached as Exhibit F and incorporated by reference. In addition, A-E shall submit the names of those persons who have received clearance and are authorized to have unsupervised access to school campuses on a form as indicated in Exhibit G. Any person whose name is not on the cleared list may not have such access. In that case, A-E must make arrangements with Owner for appropriate access. No person with a violent or serious felony as reported by DOJ may have access to the school campuses.

B. Failure to comply with this provision, or permitting unsupervised access by an employee whose name has not been cleared by DOJ as certified by A-E, shall constitute grounds for termination of this Agreement.

ARTICLE 25. ENTIRE AGREEMENT

A. All of the agreement between the parties is included herein, except to the extent that work on specific Projects will be initiated by Service Order hereunder. No warranties, expressed or implied, representations, promises, or statements have been made by either party unless endorsed hereon in writing, and no charges or waiver of

any provision hereof shall be valid unless made in writing and executed in the same manner as the Agreement.

B. Neither amendments to nor modifications of this Agreement, nor of any Service Order, shall be effective unless signed by officials of A-E and Owner having authority equal to or greater than that of the officials signing this Agreement. Owner and A-E hereby agree to the full performance of the covenants contained herein.

[Architect]

By: _____
**[A-E's Authorized Representative]
(Please print)**

(Title)

(Signature)

[Address, Telephone, Fax and Tax ID #]

San Juan Unified School District

By: _____

Nicholas Arps

Its: Director of Facilities Construction & Modernization

By: _____
Frank Camarda

Its: Chief Operations Officer

Date: _____

Date: _____

Date Received: _____

Board Approval Date: _____

Exhibit A

PO #	_____
Req. #	_____
Vendor #	_____
Project #	_____

SERVICE ORDER TO MASTER AGREEMENT
Contract Agreement Between
San Juan Unified School District and [Architect]

This Service Order is entered into by and between San Juan Unified School District ("SJUSD") and _____ ("A-E") in accordance with Master Agreement No. _____, dated April __, 2024 ("Agreement"). Pursuant to this Service Order, SJUSD hereby assigns _____ project ("Project") to A-E.

This Service Order is issued in accordance with the Agreement, and all terms of the Agreement apply, except as otherwise modified herein.

A-E's fees for this Project reflect all work/responsibility, as marked on the form included herein and otherwise specified in this Service Order, to perform all Services required. A-E's fees for the Basic Services included herein are based on:

Fixed Fee Hourly Rates (attached) Percentage of Construction Budget (____%)

Project Budget: \$ _____ Construction Budget: \$ _____

A-E's compensation for Reimbursable Expenses and any Extra Services shall be in accordance with Article 11 of the Agreement

The following summarizes information related to the Project:

Project Name	
Project Location	
Budget Code	
Total Fee	
Start/End Dates	
A-E Contact and Email	

Minimum Monthly Site Visit Hours, Construction Phase Site Visits

Architecture/Engineering	Hours
Mechanical Engineering	Hours
Electrical Engineering	Hours
Civil Engineering	Hours
Low-Voltage Engineering	Hours
Landscape Architecture	Hours
Specialty Engineering	Hours



San Juan Unified School District
Facilities Business Dept.
5320 Hemlock Street
Sacramento, California 95841

Architect/Engineer

I. Pre-Design Phase

- Assists Owner with detailed written educational program
- Assists Owner initiate detailed scope development
- Assists Owner develop detailed written scope for project
- Assists Owner with District Master Specifications & Design Standards
- Prepares base drawings
- Initiates discussions with District M&O staff regarding existing conditions
- Conducts site investigations to gather data on existing conditions
- Investigates DSA status of construction not shown on record drawings
- Develops initial construction budget based on complete project scope

II. Design Phase

- Prepares schematic design drawings
- Prepares design development drawings and specifications
- Prepares final construction documents (excluding front-end documents)
- Cost estimating and budget tracking
- Maintains document production schedule
- Assists Owner prepare State funding application documents
- All required reviews by DSA
- Quality control and coordination of documents
- Incorporates DSA back-check comments
- Assists Project Manager package bid documents
- Assists Owner submit documents to State funding agency

III. Bid and Award Phase

- Assists CM with Contractor marketing
- Assists CM with Pre-bid meeting
- Addenda

IV. Construction Phase

- Submittal review
- Issues Architect's instructional bulletins
- Assists Owner with approval of PCO
- Assists CM issue Construction Change Directive
- Assists Owner with Change Order approval
- Assists CM with Change Orders and cost issues
- Responds to RFI
- Addresses all technical issues
- Assists P.I. oversee construction quality
- Assists CM review progress payment applications
- DSA required reports
- Punch list preparation
- Punch list clearance
- DSA closeout documents
- Assists Owner with State funding closeout documents
- Reviews contract closeout documents with G.C.
- Assists PM review checklist for completeness
- Prepares final Record documents

Required Additional Services: _____

Revisions to Basic Services: _____

Additional Authorized Reimbursable Expenses: _____

Key Personnel: _____

Department of Justice (DOJ) Fingerprinting:

Required

Not Required

Date Received: _____

Date: _____

San Juan Unified School District

[Architect]

By: _____

Nicholas Arps
Director Facilities, Construction & Modernization

By: _____

[Name]
[Position] _____ Date

By: _____

Frank Camarda
Chief Operations Officer

By signing, A-E reaffirms its agreement
to all the terms and conditions of the
Agreement pursuant to which this
Service Order is awarded.

Attachments:

Schedule
Certification Re: Russian Sanctions

Exhibit B

FEE PROPOSAL

Contract Agreement Between

San Juan Unified School District and [Architect]

INSERT FROM STATEMENT OF QUALIFICATIONS

Exhibit C

SAN JUAN UNIFIED SCHOOL DISTRICT FACILITY DESIGN STANDARDS

Contract Agreement Between San Juan Unified School District and [Architect]

This Exhibit C contains the current Design Standards as of November 1, 2023. However, the District periodically updates its Design Standards and District Technical Specifications. When a Service Order is issued, A-E shall download the most current versions from Kahua and perform its services in accordance with those versions.

Exhibit D**RESPONSIBILITY MATRIX****[Subject to Change in a Service Order]****Contract Agreement Between
San Juan Unified School District and [Architect]**

	OWNER	Project Manager	Const. Manager	A/E	P.I.	G.C.
Pre-Design Phase						
Identification and prioritization of projects		Primary				
Conduct project integration exercise	Primary	Assists				
Identify primary design professional	Primary	Assists				
Prepare primary design professional contract	Primary	Assists				
Provide existing record drawings	Primary	Assists				
Provide detailed written educational program	Primary	Assists		Assist		
Initiate detailed scope development	Primary	Assists		Assist		
Develop detailed written scope for project	Primary	Assists		Assist		
Provide District Master Specifications & Design Stds.	Primary	Assists		Assist		
Provide priorities for use of available funding	Primary	Assists				
Conduct limited programming exercise at sites which have additional funding	Primary	Assists				
Prepare base drawings	Review Assists	Review		Primary		
Initiate discussions with District M&O staff regarding existing conditions		Assists		Primary		
	OWNER	Project Manager	Const. Manager	A/E	P.I.	G.C.
Conduct site investigations to gather data on existing conditions	Facilitate	Assists		Primary		
Investigate DSA status of construction not shown on record drawings	Assists	Assists		Primary		

Provide available data on hazardous material	Primary	Assists				
Develop initial construction budget based on complete project scope	Assists		Assists	Primary		
Design Phase						
Prepare schematic design drawings		Review		Primary		
Review schematic design drawings	Assists	Primary				
Prepare design development drawings and specifications		Review		Primary		
Review design development drawings and specifications	Assists	Primary	Assists		Assists	
Preparation of final construction documents (Excluding front end docs)		Assists		Primary		
Preparation of front end documents	Primary	Assists				
Review of final construction documents	Assists	Primary	Assists		Assists	
Cost estimating and budget tracking	Assists	Assists		Primary		
Maintaining document production schedule		Assists		Primary		
Preparation of State funding application documents	Primary	Assists		Assists		
All required reviews by DSA		Assists		Primary		
Quality Control and coordination of documents		Primary	Assists	Primary		
Third party review for QC and coordination of documents		Primary	Assists			
Incorporation of DSA back check comments		Assists		Primary		
Packaging bid documents	Assists	Primary	Assists	Assists		
Submittal of documents to State funding agency	Assists	Primary		Assists		
Tracking of State funding status	Primary					
Bid & Award Phase						
Reproduction and distribution of bid documents		Assists	Primary			
Contractor marketing	Assists	Assists	Primary	Assists		
	OWNER	Project Manager	Const. Manager	A/E	P.I.	G.C.
Pre-bid meeting	Assists	Assists	Primary	Assists	Assists	
Addenda			Assists		Primary	
Bid opening	Primary	Assists	Assists			
Recommendation for award	Primary	Assists	Assists			
Preparation of State funding post-bid documents	Primary	Assists				

Draft and issue contracts		Primary				
Review insurance and bonds		Primary				
Issue notice of intent to award	Primary	Assists				
Issue notice to proceed	Primary		Assists			
Construction Phase						
Schedule review		Assists	Primary			
Submittal review			Assists	Primary		
Issuance of Architects Instructional Bulletins			Assists	Primary		
Issuance of Requests for Proposal				Primary		
Issue proposed change orders					Primary	
Approval of PCO	Primary	Assists	Assists	Assists		
Issue Construction Change Directive	Assists	Assists	Primary	Assists		
Change order approval	Primary	Assists	Assists	Assists		
Change orders and cost issues	Assists	Assists	Primary	Assists		
Issue request for information					Primary	
Respond to RFI			Assists	Primary		
Address all technical issues	Assists		Assists	Primary		
Oversee construction quality	Assists		Assists	Assists	Primary	
Carry out work on schedule			Monitor			Primary
Prepare progress payment application w/ schedule of values					Primary	
Review as-built drawings			Assists		Primary	
Review progress payment applications			Primary	Assists	Assists	
Interface with staff at occupied site	Primary		Assists			
Hazardous material inspection	Primary					
Coordinate moving of staff	Primary		Assists			
Construction cleanup			Monitors			Primary
Means, methods and materials					Primary	Primary
DSA required reports			Assists	Primary	Primary	Primary
Punch list preparation	Assists		Assists	Primary	Assists	
Punch list work completion			Monitor		Monitor	Primary
Punch list clearance			Assists	Primary	Assists	
DSA closeout documents			Assists	Primary	Assists	Assists
State funding closeout documents	Primary		Assists	Assists		
Contract closeout documents	Reviews		Reviews	Reviews		Primary
	OWNER	Project Manager	Const. Manager	A/E	P.I.	G.C.
Review check-list for completeness	Assists	Primary	Assists	Assists		
Record documents			Assists	Drafts	Reviews	Assists
Warranty inspection	Primary	Assists	Assists			

Exhibit E

RESPONSIBILITIES AND SERVICES OF ARCHITECT

[Subject to Change in a Service Order]

Contract Agreement Between
San Juan Unified School District and [Architect]

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EXHIBIT "E"**RESPONSIBILITIES AND SERVICES OF A-E**

A-E shall provide all professional services necessary for completing the following:

A. GENERAL

A-E agrees to provide the services described below and in the Agreement:

1. A-E shall be responsible for the professional quality and technical accuracy of all studies, reports, projections, master plans, designs, drawings, specifications and other services furnished by A-E under the Agreement, as well as coordination with all Master plans, studies, reports and other information provided by Owner. In creating deliverables hereunder, the A-E also shall comply with the Owner's current Design Standards. A-E shall, without additional compensation, correct or revise any errors or omissions in its studies, reports, projections, master plans, design, drawings, specifications and other services or deliverables, including without limitation any failure to accurately represent the Owner's Design Standards in the Construction Documents.

2. Project Construction Cost

- a. A-E shall have responsibility to further develop, review, and reconcile the Project Construction Cost within the parameters of the Construction Budget established for the Project. The Construction Budget is stated in the Service Order. The estimates forming the basis of the Project Construction Cost are to be based on the developed functional Architectural programs as approved by the Owner. The following conditions apply to the Project Construction Cost prepared by the A-E:
 - (i) All cost estimates are to be based on current bid prices, with escalation rate and duration clearly identified on a separate line item. The escalation rate line item shall incorporate all escalation adjustments based on an industry-standard cost index, to the mid-point of construction. Projected bid and construction dates are to be as approved by the Owner.
 - (ii) Format shall be in a building systems format (e.g., foundations, substructure, structural system, exterior wall enclosure, window systems, etc.), and summarized by the Construction Specification Institute (CSI) categories, unless otherwise directed by Owner.

- (iii) Contingencies for design, bidding, and construction are to be included as individual line items, with the percentage and base of calculation clearly identified.
 - (iv) The A-E shall include all information and estimates from the Owner and/or the Construction Manager that are intended to be part of the Construction Cost Budget.
 - (v) The Project Construction Cost shall be submitted as part of the estimates required under Article 2.D. The A-E shall submit its proposed Project Construction Cost to the Owner and the Construction Manager, if any, for review, comment, requests for further development or reconciliation to the Construction Budget, and approval.
 - (vi) Mechanical, electrical, low voltage, civil, landscape and estimating consultant(s) shall participate in the progress meetings as appropriate and shall provide input and feedback into the development and revisions of the Construction Cost Budget.
- b. The Project Construction Cost must not exceed the Owner's Construction Budget for the Project. The accuracy of the Project Construction Cost shall be the responsibility of the A-E.
3. **Meetings.** Throughout its performance of the Agreement, A-E shall attend, take part in, and, when indicated, conduct meetings, site visits, and workshops as indicated below or in the Agreement.
4. **Interior Design.** Provide interior design and other similar services required for or in connection with selection and color coordination of materials. A-E is required to coordinate the placement of furniture, equipment layout, or schematic space allocation. The Owner shall procure furnishings and moveable equipment.
5. **Mandatory Assistance**

If a third party dispute or litigation, or both, arises out of, or relates in any way to the Services provided under this Agreement, upon the Owner's request, the A-E agrees to assist in resolving the dispute or litigation. The A-E's assistance includes, but is not limited to, making its agents, officers, employees, and subconsultants available for professional consultations, attending mediations, arbitrations, depositions, trials or any event related to the dispute resolution and/or litigation ("Mandatory Assistance").

The Owner will compensate the A-E for fees incurred for providing Mandatory Assistance in accordance with Article 3.F.8.b, *except that*, if the third party dispute or litigation is found to be attributable, in whole or in part,

to the acts or omissions of the A-E, its agents, officers, subconsultants and/or employees, then the A-E shall reimburse the Owner for all fees paid to the A-E for Mandatory Assistance.

B. PRE-DESIGN AND START-UP SERVICES

1. Project Initiation

In accordance with Article 14 of the Agreement, the A-E shall:

- a. Within the first week following execution of the Agreement, review the proposed Schedule of Work set forth in the Service Order for the Project and prepare a detailed scope of work list and work plan for documentation in a computer-generated Project schedule to the Owner's satisfaction. This scope of work list and work plan will identify specific tasks including, but not limited to: interviews, data collection, analysis, report preparation, planning, architectural programming, concepts and schematic design preparation and estimating that are part of the work of each Project. A-E shall also identify Project milestone activities and/or dates, specific task responsibilities, required completion times necessary for the review and approval by the Owner and by all regulatory agencies and additional definition of deliverables.
- b. Review the developed work plan with the Owner and its representatives to familiarize them with the proposed tasks and schedule and develop necessary modifications.

2. Development of Architectural Program

The A-E shall prepare for the Owner's review an Architectural program as follows:

- a. Perform pre-design investigations to establish appropriate guidelines around which and within which each Project is to be designed. Identify design issues relating to functional needs, directives and constraints imposed by regulatory codes. Review all data pertinent to each Project including survey, site maps, geotechnical reports and recommendations, soil testing results reports, and pertinent historical data, and other relevant information provided by Owner.
- b. Review DSA codes pertaining to the proposed Project design.
- c. Identify design issues relating to functional needs, directives and constraints imposed by applicable regulatory codes.

- d. Based on survey and topography data provided by the Owner, input into the computer and develop an existing conditions base for the Schematic Design Phase.
- e. Administer the Project as required to coordinate work with the Owner and between subconsultants.

3. **Presentation**

A-E, along with any involved consultant(s), shall present and review with the Owner and, if directed, with the Owner's governing board, the summary and detail of work reflected in the scope of work list and work plan, including two dimensional renderings of any proposed facility suitable for public presentation.

4. **Deliverables and Numbers of Copies**

A-E shall provide to the Owner three (3) hard copies and one (1) electronic copy of all deliverables required in this Phase, including without limitation:

- a. Copies of Architectural Program (Include comparison between developed program and "model" program, include narrative explaining any substantial deviations).
- b. Copies of Site Plan.
- c. Copies of revised Construction Cost Budget.
- d. Copies of final Schedule of Work;
- e. Copies of Meeting Reports/Minutes from Kick-off and other meetings
- f. Copies of renderings provided to Owner for public presentation.

C. **SCHEMATIC DESIGN PHASE**

Upon Owner's acceptance of the Pre-Design and Start-Up Services deliverables, A-E shall perform the Schematic Design Phase in accordance with Article 3.A of the Agreement, including the following:

- 1. Update the scope of work list and work plan prepared in the Pre-Design phase, as necessary and subject to Owner's approval.

2. **Architectural**

- a. Scaled floor plans showing overall dimensions, identifying the various major areas and their relationship. Include circulation and room-by-room tabulation of all net usable floor areas and a summary of gross floor area. Also, provide typical layouts of major equipment or operational layout.
- b. Preliminary building exterior elevations and sections in sufficient detail to demonstrate design concept indicating location and size of fenestration.
- c. As applicable, identify proposed roof system, deck, insulation system and drainage technique.
- d. Identify minimum finish requirements, including ceiling, floors, walls, doors, windows, and types of hardware.
- e. Identify code requirements, include occupancy classification(s) and type of construction.

3. **Structural**

- a. Lay out structural systems with dimensions and floor elevations. Identify structural systems (including pre-cast, structural steel with composite deck, structural steel bar joists) with preliminary sizing identified.
- b. Identify foundation systems (including fill requirements, piles, caissons, spread footings) with preliminary sizing identified.

4. **Mechanical**

- a. Calculate block heating, ventilation, and cooling loads including skin versus internal loading.
- b. Select a minimum of two (2) HVAC systems that appear compatible with loading conditions for subsequent life cycle costing.
- c. Show selected systems on drawings as follows:
 - (i) Single line drawing(s) of all mechanical equipment spaces, ductwork and pipe chases.
 - (ii) Location and preliminary sizing of all major equipment and duct work in allocated spaces.
 - (iii) Schematic piping.

- (iv) Temperature control zoning.
- d. Provide design criteria to include the intent base of design for each Project.

5. **Electrical**

- a. Calculate overall approximate electrical loads.
- b. Identify proposed electrical system for service, power, lighting, low voltage and communication loads, including proposed or planned additional buildings or other facilities on each Project site.
- c. Show system(s) selected on drawings as follows:
 - (i) Single line drawing(s) showing major distribution system.
 - (ii) Location and preliminary sizing of all major electrical systems and components including:
 - (A) Load centers.
 - (B) Main panels.
 - (C) Switch gear.
- d. Provide design criteria to include the intent base of design for each Project.

6. **Civil**

- a. Develop on- and off-site utility systems such as sewer, water, storm drain, firewater lines and fire hydrants.
- b. Identify surface improvements including roadways, walkways, parking (with assumed wheel weights), preliminary finish grades and drainage.
- c. Coordinate finish floor elevations with Architectural site plan.

7. **Landscape**

Develop and coordinate landscape design concepts entailing analysis of existing conditions, proposed components and how the occupants will use the facility. Include location and description of planting, ground improvements and visual barriers.

8. **Specifications**

Prepare outline specifications of proposed Architectural, structural, mechanical and electrical materials, systems and equipment and their criteria and quality standards. A-E is to use Owner's standardized equipment/material list for new construction and modernization in development of each Project design and specifications. A-E shall coordinate the specifications with Division 0 and 1 documents supplied by Owner.

9. **Project Construction Cost**

Revise the Project Construction Cost for each Project. Along with the conditions previously identified herein and identified in the Agreement, the following conditions apply to the revised Project Construction Cost:

- a. Schematic Estimates: This estimate consists of unit cost applied to the major items and quantities of work. The unit cost shall reflect the complete direct current cost of work. Complete cost includes labor, material, waste allowance, sales tax and subcontractor's mark-up.
 - (i) General conditions shall be applied separately. This estimate shall be prepared by specification section and summarized by the CSI categories.
- b. The estimate shall separate each Project's building cost from site and utilities cost. A-E shall submit to the Owner the cost estimating format for prior review and approval.
- c. The revised Project Construction Cost may include design contingencies of no more than ten percent (10%) in the cost estimates.

10. **Deliverables and Numbers of Copies**

A-E shall provide to the Owner three (3) hard copies and one (1) electronic copy of all deliverables required in this Phase, including without limitation:

- a. Updated Project Construction Cost.
- b. Meeting Reports/Minutes.
- c. Schematic Design Package with alternatives.
- d. A statement indicating changes made to the Architectural Program and Schedule.

- e. DSA file, including all correspondence and meeting notes to date, or notification in writing that A-E has not met or corresponded with DSA.
11. **Presentation:** A-E shall present and review with the Owner and/or the Board of Education the detailed Schematic Design.
12. **Revisions:** The Schematic Design shall be revised within the accepted program parameters until a final concept within the accepted Project Construction Cost has been accepted and approved by the Owner, at no additional cost to the Owner.

D. DESIGN DEVELOPMENT DOCUMENT PHASE

Upon Owner's acceptance of the Schematic Design deliverables, A-E shall perform the Design Development Document Phase in accordance with Article 3.B of the Agreement. The Design Development Phase Documents shall include the following for each proposed system within A-E's scope of work:

1. Update the scope of work list and work plan, as necessary and subject to Owner's approval.
2. **Architectural**
 - a. Scaled, dimensioned floor plans with final room locations including all openings.
 - b. 1/8" scale building sections showing dimensional relationships, materials and component relationships.
 - c. Identification of all fixed equipment to be installed in contract.
 - d. Site plan completely drawn with beginning notes and dimensions including grading and paving.
 - e. Preliminary development of details and large scale blow-ups.
 - f. Legend showing all symbols used on drawings.
 - g. Floor plans identifying all fixed and major movable equipment and furniture.
 - h. Further refinement of Outline Specification for Architectural, structural, mechanical, electrical, civil and landscape manuals, systems and equipment.

- i. Typical reflected ceiling development including ceiling grid and heights for each ceiling to be used, showing:

- (i) Light fixtures.
- (ii) Ceiling registers or diffusers.
- (iii) Access Panels.

3. Structural:

- a. Structural drawing with all major members located and sized.
- b. Establish final building and floor elevations.
- c. Preliminary specifications.
- d. Identify foundation requirement (including fill requirement, piles) with associated soil pressure, water table and seismic center.

4. Mechanical

- a. Heating and cooling load calculations as required and major duct or pipe runs sized to interface with structural.
- b. Major mechanical equipment should be scheduled indicating size and capacity.
- c. Ductwork and piping should be substantially located and sized.
- d. Devices in ceiling should be located.
- e. Legend showing all symbols used on drawings.
- f. More developed Outline Specifications indicating quality level and manufacture.
- g. Control Systems to be identified.

5. Electrical

- a. All lighting fixtures should be located and scheduled showing all types and quantities of fixtures to be used, including proposed lighting levels for each usable space.
- b. All major electrical equipment should be scheduled indicating size

and capacity.

- c. Complete electrical distribution including a one line diagram indicating final location of switchboards, communications, controls (high and low voltage), motor control centers, panels, transformers and emergency generators, if required. Low voltage system includes fire alarm system, security system, clock and public address system, voice data system, and telecom/technology system.
- d. Legend showing all symbols used on drawings.
- e. More developed and detailed Outline Specifications indicating quality level and manufacture.

6. Civil

- a. Further refinement of Schematic Design Phase development of on and off site utility systems for sewer, electrical, water, storm drain and fire water. Includes, without limitation, pipe sizes, materials, invert elevation location and installation details.
- b. Further refinement of Schematic Design Phase roadways, walkways, parking and storm drainage improvements. Includes details and large scale drawings of curb and gutter, manhole, thrust blocks, paved parking and roadway sections.

7. Landscape

Further refine Schematic Design concepts. Includes coordination of hardscape, landscape planting, ground cover and irrigation main distribution lines.

8. Project Construction Cost

Revise the Project Construction Cost for each Project. Along with the conditions previously identified herein and identified in the Agreement, the following conditions apply to the revised Project Construction Cost:

- a. Design Development Estimate: This further revised estimate shall be prepared by specification section, summarized by CSI category and divided by trade and work item. The estimate shall include individual item unit costs of materials, labor and equipment. Sales tax, contractor's mark-ups, and general conditions shall be listed separately.

9. Deliverables and Numbers of Copies

A-E shall provide to the Owner three (3) hard copies and one (1) electronic copy of all deliverables required in this Phase, including without limitation:

- a. Design Development drawing set from all professional disciplines necessary to deliver the Project.
- b. Specifications.
- c. Revised Project Construction Cost.
- d. DSA file, including all correspondence and meeting notes to date, or notification in writing that A-E has not met or corresponded with DSA.
- e. The Design Development deliverables shall be revised within the accepted program parameters until a final concept within the accepted Project Construction Cost has been accepted and approved by the Owner, at no additional cost to the Owner.

10. Presentation: A-E shall present and review with the Owner and/or the Board of Education the Design Development Documents.

11. Revisions: The Design Development Documents shall be revised within the accepted program parameters until a final concept within the accepted Construction Cost Budget has been accepted and approved by the Owner, at no additional cost to the Owner.

E. CONSTRUCTION DOCUMENTS PHASE

Upon Owner's acceptance of the Design Development Document deliverables, A-E shall perform the Construction Document Phase in accordance with Article 3.C of the Agreement. The Construction Documents shall include the following for each proposed system within A-E's scope of work:

1. Construction Documents ("CD") 50% Stage:

a. Architectural

- (i) Site plan developed to show building location, all topographical elements and existing/proposed contour lines.
- (ii) Elevations (exterior and interior), sections and floor plans corrected to reflect design development review comments.
- (iii) Architectural details and large blow-ups started.

- (iv) Well-developed finish, door, and hardware schedules.
- (v) Site utility plans started.
- (vi) Fixed equipment details and identification started.
- (vii) Reflected ceiling plans coordinated with floor plans and mechanical and electrical systems.

b. Structural

- (i) Structural floor plans and sections with detailing well advanced.
- (ii) Structural footing and foundation plans, floor and roof framing plans with detailing well advanced.
- (iii) Completed cover sheet with general notes, symbols and legends.

c. Mechanical

- (i) Mechanical calculations virtually completed with all piping and ductwork sized.
- (ii) Large scale mechanical details started.
- (iii) Mechanical schedule for equipment substantially developed.
- (iv) Complete design of Emergency Management System ("EMS").

d. Electrical

- (i) Lighting, power, signal and communication plans showing all switching and controls. Fixture schedule and lighting details development started.
- (ii) Distribution information on all power consuming equipment; lighting and device branch wiring development well started.
- (iii) All electrical equipment schedules started.
- (iv) Special system components approximately located on plans.
- (v) Complete design of low voltage system. Low voltage system includes fire alarm system, security system, clock and public address system, voice data system, and telecom/technology system.

e. Civil

All site plans, site utilities, parking, walkway, and roadway systems updated to reflect update revisions from Design Development Phase Documents.

f. Landscape

All landscape, hardscape, and irrigation plans updated to reflect update revisions from Design Development Phase Documents.

g. Project Construction Cost

- (i) Revise the Project Construction Cost for each Project. Along with the conditions previously identified herein and identified in the Agreement, A-E shall update and refine the Design Development Phase revisions to the Project Construction Cost. A-E shall provide a Project Construction Cost sorted by each Project Bid Package.
- (ii) At this stage of the design, the Construction Cost Budget may include design contingencies of no more than 5% in the cost estimates.

h. Specifications

More than fifty percent (50%) complete development and preparation of technical specifications describing materials, systems and equipment, workmanship, quality and performance criteria required for the construction of each Project.

- (i) No part of the specifications shall call for a designated material, product, thing, or service by specific brand or trade name unless:
 - (A) The specification is followed by the words "or equal" so that bidders may furnish any equal material, product, thing, or service, as required by Public Contract Code, section 3400, or
 - (B) The designation is allowable by a specific allowable exemption or exception pursuant to Public Contract Code, section 3400
- (ii) Specifications shall not contain restrictions that will limit competitive bids other than those required for maintenance convenience by the Owner and only with Owner's prior approval, or as required by Owner's Design Standards.
- (iii) Specifications shall be in CSI format.

i. Deliverables and Numbers of Copies

A-E shall provide to the Owner three (3) hard copies and one (1) electronic copy of all deliverables required in this Phase, including without limitation:

- (i) Working drawings
- (ii) Specifications
- (iii) Statement of requirements for testing and inspection of service for compliance with Construction Documents and applicable codes.
- (iv) A statement indicating any authorized changes made to the design from the last Phase and the cost impact of each change on the previously approved Project Construction Cost. If no design changes occur, but shifts of costs occur between disciplines, identify such shifts for Owner review.

j. Presentation: A-E shall present and review with the Owner and/or the Board of Education the 50% Construction Documents.

k. Revisions: The 50% Construction Documents shall be revised within the accepted program parameters until a final concept within the accepted Project Construction Cost has been accepted and approved by the Owner, at no additional cost to the Owner.

2. Construction Documents – 100% / Completion Stage:

a. Architectural

- (i) Completed site plan.
- (ii) Completed floor plans, elevations, and sections.
- (iii) Architectural details and large blow-ups completed.
- (iv) Finish, door, and hardware schedules completed, including all details.
- (v) Site utility plans completed.
- (vi) Fixed equipment details and identification completed.
- (vii) Reflected ceiling plans completed.

b. Structural

- (i) Structural floor plans and sections with detailing completed.
- (ii) Structural calculations completed.

c. Mechanical

- (i) Large scale mechanical details complete.
- (ii) Mechanical schedules for equipment completed.
- (iii) Completed electrical schematic for environmental cooling and exhaust equipment.
- (iv) Complete energy conservation calculations and report.

d. Electrical

- (i) Lighting and power plan showing all switching and controls. Fixture schedule and lighting details completed.
- (ii) Distribution information on all power consuming equipment, including lighting, power, signal and communication device(s) branch wiring completed.
- (iii) All electrical equipment schedules completed.
- (iv) Special system components plans completed.
- (v) Electrical load calculations completed.

e. Civil

All site plans, site utilities, parking and roadway systems completed.

f. Project Construction Cost

- (i) Revise the Project Construction Cost for each Project. Along with the conditions previously identified herein and identified in the Agreement, A-E shall update and refine the 50% Construction Documents Phase revisions to the Project Construction Cost.
- (ii) At this stage of the design, the Project Construction Cost shall not include any design contingencies in excess of the cost estimates.
- (iii) The final Project Construction Cost shall be consistent with the Construction Budget in the Service Order.

g. Specifications

- (i) Complete development and preparation of technical specifications describing materials, systems and equipment, workmanship, quality and performance criteria required for the construction of each Project.
- (ii) No part of the specifications shall call for a designated material, product, thing, or service by specific brand or trade name unless:
 - (A) The specification is followed by the words "or equal" so that bidders may furnish any equal material, product, thing, or service, as required by Public Contract Code, section 3400; or
 - (B) The designation is allowable by specific allowable exemptions or exceptions pursuant to Public Contract Code, section 3400.
- (iii) Specifications shall not contain restrictions that will limit competitive bids other those required for maintenance convenience by the Owner and only with Owner's prior approval, or as required by Owner's Design Standards.
- (iv) Coordination of the Specifications with specifications developed by other disciplines.
- (v) Specifications shall be in CSI format.

h. Constructability Review

The Owner shall conduct a construction review of the Construction Documents, which may include a third-party peer review. A report shall be given to the A-E who shall make all necessary changes, at no cost to Owner, along with providing written comments for each item listed in the report to Owner within Fourteen (14) days of receipt of the constructability review. This process may be an iterative process, in which the Owner may review A-E's changes and comments and return the Construction Documents to A-E for further necessary revisions. All necessary revisions must be complete prior to obtaining DSA approval of the documents.

i. Deliverables and Numbers of Copies

A-E shall provide to the Owner three (3) hard copies and one (1) electronic copy of all deliverables required in this Phase, including without limitation:

- (i) Working drawings
- (ii) Specifications
- (iii) Engineering calculations

- (iv) Revised Project Construction Cost
- (v) Statement of requirements for testing and inspection of service for compliance with Construction Documents and applicable codes
- (vi) DSA file including all correspondence, meeting, back check comments, checklists to date
- (vii) A statement indicating any authorized changes made to the design from the last Phase and the cost impact of each change on the previously approved Project Construction Cost. If no design changes occur but shifts of costs occur between disciplines, identify for Owner review.

3. Construction Documents (CD) Final Back-Check Stage

- a. The Construction Documents final back-check stage shall be for the purpose of the A-E incorporating all regulatory agencies' comments into the drawings, specifications, and estimate. All changes made by the A-E during this stage shall be at no additional cost to the Owner.
- b. The final contract documents delivered to the Owner upon completion of the A-E's work shall be the Bid Set and shall consist of the following:
 - (i) Drawings: Original tracings of all drawings on A-E's tracing paper with each A-E/consultant's State license stamp.
 - (ii) Specifications: Original word-processed technical specifications on reproducible masters in CSI format.
- c. A-E shall update and refine the consultants' completed Construction Documents.

F. BIDDING PHASE

Upon receipt of all required approvals and Owner's acceptance of the Construction Documents deliverables, A-E shall perform the Bidding Phase in accordance with Article 3.E of the Agreement. In addition to the bid and award phase tasks set forth in Article 3.E of the Agreement, the A-E shall perform Bidding Phase services for Owner as follows:

1. Contact potential bidders and encourage their participation in each Project, if requested by Owner.
2. Coordinate and confer with Owner on the development of the bidding

procedures and the construction contract documents.

3. While each Project is being advertised for bids, all questions concerning intent shall be referred to the Owner for screening, and may be referred to A-E for input.
4. In the event that items requiring interpretation of the drawings or specifications are discovered during the bidding period, those items shall be analyzed by the A-E for decision by the Owner as to the response required. Corrective action may be in the form of an addendum prepared by the A-E and issued by the Owner.
5. Attend pre-bid meeting.
6. Coordinate with subconsultants.
7. Respond to Owner questions and clarifications.
8. Upon completion of the Bidding Phase, A-E shall produce a Conforming Set of plans and specifications incorporating all addenda issued thus far. A-E shall supply Owner with one (1) complete, reproducible set of plans and specifications marked as a Conforming Set, and one (1) electronic copy.

G. CONSTRUCTION PHASE

Upon Owner's award of one or more construction contracts for the Project(s), the A-E shall perform Construction Administration Phase services for the Owner as specified in the Agreement and as follows:

1. During construction, the A-E shall furnish all necessary additional drawings for supplementing, clarifying, and/or correcting Construction Documents and for change orders. The Owner shall request these drawings from the A-E, which drawings shall be at no additional cost unless designated as Extra Services by the Owner. A-E shall submit the original tracing(s) and/or drawings and contract wording for change orders to the Owner for duplication and distribution.

2. Submittals

Any required A-E action upon contractor's submittals shall be taken as expeditiously as possible so as to cause no unreasonable delay in the construction of each Project or in the work of separate contractors, while allowing sufficient time in the A-E's professional judgment to permit adequate review. In no case shall the review period associated with a single, particular submittal exceed fourteen (14) calendar days from its receipt by the A-E. A-E's response to each submittal shall be a substantive and acceptable response. This 14-day time period shall not include time when a submittal is within the Owner's control or if the submittal is being

reviewed by DSA. In no way does this provision reduce the A-E's liability if it fails to prepare acceptable documents.

3. RFIs

During the course of construction, all Requests for Information ("RFI") must be responded to as expeditiously as possible so as not to impact and delay the construction progress. In no case shall the review period associated with an RFI exceed three (3) calendar days from the receipt by the A-E. A-E's response to each RFI shall be a substantive and acceptable response. This 3-day time period shall not include time when a submittal is within the Owner's control or if the submittal is being reviewed by DSA. In no way does this provision reduce the A-E's liability if it fails to prepare acceptable documents.

4. On the basis of on-site observations in accordance with Agreement Article 3.F.4, the A-E shall keep the Owner informed of the progress and the quality of the work, including submitting any written reports of its observations to Owner. A-E also shall endeavor to guard the Owner against defects and deficiencies in the work. A-E shall notify the Owner in writing of any defects or deficiencies in the work by any of the Owner's contractors that the A-E may observe. However, the A-E shall not be a guarantor of the contractor's performance.
5. **As-Built Documents** A-E shall review and evaluate for Owner, the contractor(s)' recorded changes which the contractor(s) should prepare and submit as As Built Documents. These reviews shall be done each month, prior to progress payment approval. As-Built Documents are documents that show changes made during the construction project, including changes necessitated by change orders, and recorded by the Owner's construction contractor(s) on a Conforming Set.
6. **Record Documents.** The A-E shall prepare and submit Record Documents in accordance with Agreement Article 18.
7. **O&M Manuals / Warranties.** A-E shall review equipment, operation and maintenance manuals, and a complete set of warranty documents for all equipment and installed systems, to ensure that they meet the requirements of the plans and specifications.
8. A-E shall also provide, at the Owner's request, Architectural/engineering advice to the Owner on start-up, break-in, and debugging of facility systems and equipment, and apparent deficiencies in construction, either prior to or following the acceptance of the contractor's work.

9. Recommendations of payment to the contractor(s) by A-E constitute A-E's representation to the Owner that work has progressed to the point indicated to the best of A-E's knowledge, information, and belief, and that the quality of the work is in general conformance with the contract documents.

10. **Close Out**

- a. As the Construction Phase progresses, the A-E shall perform close out services for the Owner, as required, including without limitation:
 - (i) A-E shall review each Project and observe the construction as required herein and in the Agreement to determine when the contractor has completed the construction of each Project. In accordance with the requirements of the construction contract(s), the A-E shall prepare punch lists of items that remain in need of correction or completion.
 - (ii) A-E shall review all close out documents and recommend to the Owner whether the documents are adequate.
 - (iii) A-E shall prepare or collect, as applicable, and provide to DSA, all reports required by DSA related to the design and construction of each Project.
 - (iv) A-E shall obtain all required DSA approval on all construction change documents and any Field Trip notes issued by DSA during site visits.
 - (v) A-E shall prepare a final verified report for each Project.
 - (vi) A-E shall prepare a set of Record Documents for each Project as required in Agreement Article 18.
 - (vii) A-E shall coordinate all Services required to close-out the design and construction of each Project with the Owner and between consultants.
- b. Ownership of certain Project documents is governed by Agreement Article 19. To the extent not addressed therein or otherwise protected by copyright law, all other Project documents shall be the sole property of the Owner.

H. MEETINGS / SITE VISITS / WORKSHOPS

1. A-E shall attend, take part in, and, when indicated, conduct meetings, site visits, and workshops as indicated below. A-E shall chair, conduct and take minutes of all coordination meetings during the entire design phase with its consultant(s). A-E shall invite the Owner and/or its representative to participate in these meetings. A-E shall keep a separate log to document design/coordination comments generated in these meetings.

2. General Meeting, Site Visit, and Workshop Requirements

- a. A-E shall always be prepared to answer questions and issues from Owner staff, site staff, potential bidders, and/or contractors, as applicable.
- b. A-E shall maintain a log of all meetings, site visits or site observations held in conjunction with the design and construction of each Project, with documentation of major discussion points, observations, decisions, questions or comments. These shall be furnished to the Owner and/or its representative for inclusion in the overall Project documentation.
- c. As required, A-E shall provide at no additional cost to the Owner copies of all documents and other information needed for, or otherwise documenting, each meeting, site visit, and workshop.
- d. Each meeting may last up to three (3) hours and shall be held at the Owner's office or at a Project site, unless otherwise agreed.

3. Meetings During Project Initiation Phase

Within the first week following execution of the Agreement, the A-E shall participate in one Project kick-off meeting per site to determine each Project intent, scope, budget and timetable, which shall encompass the following:

- a. The A-E, its appropriate consultant(s), and Owner staff, shall attend the meeting.
- b. Each Project kick-off meeting will introduce key team members from the Owner and the A-E to each other, addressing roles and responsibilities relative to each Project.
- c. During this meeting, the A-E shall:
 - (i) Identify and review pertinent information and/or documentation necessary from the Owner for the completion of each Project.
 - (ii) Review and explain the overall Project goals, general approach, tasks, work plan and procedures and deliverable products of each Project.
 - (iii) Review and explain the scope of work and Project work plan for all parties present; determine any adjustments or fine tuning that needs to be made to the work plan.
 - (iv) Review documentation of each Project kick-off meeting prepared by the Owner's representative and comment prior to

distribution.

4. Initial Site Visits

A-E shall visit each Project site to complete a visual inventory and documentation of the existing conditions, including as specified in Agreement Article 3.A.1 and .2.

5. Meetings During Architectural Program

- a. A-E shall participate in one to two public community information site meetings, per site, to receive input from the community regarding its wishes and expectations regarding the design of A-E's work on each Project and the schedule of use of the sites during construction.
- b. A-E shall conduct necessary site visits with the Owner's facilities team to gather information from Owner facilities team and site personnel, and shall make a visual presentation regarding each Project.
- c. A-E and all subconsultant(s), including without limitation A-E's estimating consultant, shall participate in one or more meetings with Owner to provide input and feedback into the development of the Construction Cost Budget.

6. Meetings During Schematic Design Phase

- a. Within the first two weeks following the start of the Schematic Design Phase, A-E shall conduct one design workshop, per site, with the Owner's facilities team and site personnel to complete a basic design framework with computer-aided design equipment (CADD). The Owner may, at its discretion, allow the A-E to proceed with this meeting without using CADD. This workshop may include several meetings and shall not be concluded until each attendee has indicated his or her acceptance with the A-E's preliminary design. This workshop shall include the following:
 - (i) A-E shall designate its team member duties and responsibilities;
 - (ii) A-E and Owner shall review Owner goals and expectations;
 - (iii) Owner shall provide input and requirements;
- (iv) A-E and Owner shall review Project scope and budget, including the Construction Cost Budget and the Construction

- Budget;
- (v) Prepare and/or revise the scope of work list and general workplan from the Pre-Design Phase, for documentation in a computer-generated Project schedule;
 - (vi) Establish and agree regarding methods to facilitate the communication and coordination efforts for each Project.
- b. A-E shall schedule regular meetings with Owner every two to four weeks, at Owner's discretion, to update Owner on progress.

7. Meetings During Design Development Phase

- a. A-E shall schedule regular meetings with Owner every two to four weeks, at Owner's discretion, to update Owner on progress of the Design Development package.
- b. Value Engineering Workshop: A-E shall conduct a value engineering workshop, if requested by the Owner, including all of A-E's consultant(s), the Owner, and the Construction Manager during the Design Development Phase. This workshop may include several meetings.
- c. At the time designated for completion of the Design Development package, A-E shall conduct one meeting, per package of submittal, with the Owner to review the following:
 - (i) Present the Design Development package for review and comment to proceed with preparation of final plans and specification.
 - (ii) A-E and Owner shall review Project scope and budget, including the Construction Cost Budget and the Construction Budget.

8. Meetings During Construction Documents Phase

- a. Throughout the Construction Documents Phase, A-E shall schedule regular meetings with Owner every two to four weeks, at Owner's discretion, to update Owner on progress of the Construction Documents.
- b. Immediately prior to beginning work on the Construction Document Phase, A-E shall conduct one meeting, per package of submittal, with the Owner to revise the Design Development package and receive comments.
- c. At the time designated for fifty percent (50%) completion of the Construction Documents, A-E shall conduct one meeting, per

package or submittal, with the Owner to review the following:

- (i) Present the fifty percent (50%) submittal package for review and comment to proceed with preparation of final plans and specification.
- (ii) A-E and Owner shall provide further review of Project scope and budget, including the Construction Cost Budget and the Construction Budget;
- d. At the time designated for completion of the one hundred percent (100%) Construction Document package, A-E shall conduct one meeting, per package or submittal, with the Owner to review the following:
 - (i) Present the hundred percent (100%) Construction Document package for review and comment to proceed with preparation of final plans and specification.
 - (ii) A-E and Owner shall provide further review of Project scope and budget, including the Construction Cost Budget and the Construction Budget.

9. Meetings During Bidding Phase

- a. Attend and take part in one pre-bid meeting, per bid solicitation, with all potential bidders, Owner staff, and Construction Manager.
- b. Conduct one kick-off (pre-construction) meeting, per construction contract, with the successful bidder, Owner staff, and Construction Manager to finalize the roles and responsibilities of each party and provide protocols and processes to follow during construction.

10. Meetings During Construction Administration Phase

- a. A-E shall visit each Project site in accordance with Agreement Article 3.F.4 and as otherwise requested. A-E may coordinate these site visits so that it observes more than one site on one site visit to the Owner. The time for any meeting(s) that A-E attends to address defects or deficiencies in its design shall not be charged against the monthly hour budget in the Agreement.
- b. A-E shall ensure that its subconsultants' agreements require adequate site visits, and shall ensure that such visits are made.

11. Citizens' Bond Oversight Committee Meetings

A-E acknowledges that the design and construction of each Project is subject to oversight by the Owner's citizen bond oversight committee. A-E shall, at the Owner's direction, attend Owner citizen bond oversight committee meeting(s) to address any concerns of the Owner and/or committee. Owner anticipates up to two meetings per year.

12. Governing Board Meetings (Five (5) meeting(s))

A-E acknowledges that the Owner's governing board must approve all designs. A-E shall, at the Owner's direction, attend Owner governing board meeting(s) and be available to present the A-E's design and/or discuss project status and questions by the Owner's governing board.

Exhibit F

Contract Agreement Between San Juan Unified School District and [Architect]

A-E CERTIFICATION

I, _____, on behalf of **[Architect]**, certify that, pursuant to Education Code Section 45125.1 and Article 24 of this Agreement, this business entity has conducted the required criminal background check(s) of all persons who will be providing services to the **San Juan Unified School District** on behalf of this business entity, and that none of those persons have been reported by the Department of Justice as having been convicted of a serious or violent felony as specified in Penal Code sections 667.5(c) and/or 1192.7(c). I understand that this Certification is not to be signed and submitted until I have received clearance from DOJ regarding those persons named. As further required by Education Code 45125.1, attached hereto as Exhibit F is a list of names of the employees or agents of A-E who will be providing services to **San Juan Unified School District** and who are required to be fingerprinted as provided in the Agreement. I agree to keep this list current and to notify the **San Juan Unified School District** of any addition/deletions as they occur.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed this ____ day of _____, 20____, in _____ County, California.

(Seal of business)

By: _____
[A-E's Authorized Representative]
(Please print)

(Title)

(Signature)

Exhibit G
Contract Agreement Between
San Juan Unified School District and [Architect]

**LIST OF EMPLOYEES WHO ARE AUTHORIZED
TO COME ON TO SCHOOL CAMPUSES**

<u>Name:</u>	<u>School Site (if known)</u>

Exhibit H

PROJECT MANAGEMENT INTERNET COMMUNICATION REQUIREMENTS

- A. All Contract Documents, including General Conditions, Supplementary Conditions, and other Division 1 - General Requirements, apply to the work of this section.
- B. This section contains general information that applies to all work performed under the Contract, and is made inherently a part of each specification section.

1.02 GENERAL PROJECT MANAGEMENT OBJECTIVES

- A. San Juan Unified School District (SJUSD) has directed its Architect/Engineer to use the project's existing Internet/Web-based project management software to track and manage the project.
- B. Use of this project management software will not replace or change any contractual responsibilities of the Architect/Engineer team members.
- C. Each project team member of the Architect/Engineer: Architect, Project Manager, Project Coordinator, et al., shall have access to the Internet and an Internet e-mail address in order to communicate with various project team members. The Architect/Engineer shall provide immediately upon receipt of the executed agreement confirmation of these conditions and the names, positions, and e-mail addresses to SJUSD's Representative.

1.03 SOFTWARE AND HARDWARE REQUIREMENTS

- A. The Architect/Engineer is required to provide computer hardware and software that meet the requirements of Kahua® project management software. The Architect/Engineer may purchase their own Kahua® software, only the hardware and software required to access this system via the Internet. SJUSD will provide the Architect/Engineer with the required number of user licenses to use the existing project database for the duration of the bid package project. The Architect/Engineer licenses to the SJUSD Kahua® database will permit access only to this project, in accordance with permission levels configured by SJUSD's Kahua® administrator.
- B. SJUSD shall provide the Architect/Engineer with Kahua® training (if required). SJUSD will provide training for up to 3 Architect/Engineer staff members. Architect/Engineer, Project Manager and Project Coordinator are required to attend training sessions.

C. The Architect/Engineer shall provide an adequate number of users to properly manage the project in accordance with the Project Timetable. The Architect/Engineer shall have Internet access through an Internet service provider of his/her choice.

D. Hardware requirements are as follows:

- Workstation, laptop or tablet
- A connection to the Internet

E. More information on Kahua® may be obtained via the World Wide Web, at www.Kahua.com

1.04 SYSTEM MANAGEMENT AND USE

- A. The Architect/Engineer must sign up for their own domain in Kahua
- B. SJUSD will administer the Kahua® user account.
- C. All costs associated with using this system, including computer hardware, internet service, and additional licenses beyond the one to use the existing project database are the responsibility of the Architect/Engineer.

1.05 COMMUNICATION PROCESS

- A. SJUSD's Representative will outline and detail communication, correspondence and coordination procedures at Project start meeting.
- B. Most project communication will take place in the Kahua® project management system by creating and distributing documents directly within the system, or by entering manually in the system dates and descriptions of items to track over time. All documents requiring formal signatures will be done through Kahua.
- C. The official submittal log will be maintained within Kahua®. The Architect/Engineer will use Kahua® to review submittals using bookmarked PDF file enabling navigation to each item within the submittal package. The Kahua® project management system will be used to track and expedite processing of these items.
- D. Architect/Engineer will be required to utilize modules including but not limited to: messaging, ASI's; DSA CCD's; punch lists; requests for information (RFI); daily reports; within the Kahua® project management system. The Architect/Engineer can respond to the RFI completely within the Kahua® project management system without creating a hard copy. Support documentation only in hard copy format for any document in Kahua® may be scanned into an electronic file and

attached in Kahua® to documents.

- E. Architect/Engineer is required to furnish and use a digital camera in order to photo-document job progress and upload the associated images taken on a regular basis to the internet Kahua app.

PART 2 – PRODUCTS

- 2.01 Extranet application service provider shall be the following (no substitution)

Kahua® as provided by:

www.Kahua.com

PART 3 – EXECUTION

- 3.01 Kahua® is an Internet-Accessed Centralized Database of project information and consists of several separate modules or master file divisions for ease of organization. Available file divisions include but are not limited to: Correspondence, Daily Reports, RFI's, Transmittals, Submittals, Meetings, Documents, Drawings, Specifications, File Management, Punch Lists, Reports, Project Team, Schedule of Values, Change Items, Request for Proposals, etc.
- 3.02 Architect/Engineer shall be provided with the required number of user licenses for Kahua® (ASP) by SJUSD. Each major team member for the Architect/Engineer (ie project manager, project coordinator, etc.) must have a separate user license. The Architect/Engineer shall insure that all major team members on this project have Internet access available during the duration of this project.

Exhibit I

CERTIFICATION REGARDING RUSSIAN SANCTIONS

On March 4, 2022, Governor Gavin Newsom issued Executive Order N-6-22 regarding Economic Sanctions against Russia and Russian entities and individuals. "Economic Sanctions" hereunder refers to sanctions imposed by the United States government in response to Russia's actions in Ukraine, as those sanctions may be updated from time to time, as well as any sanctions imposed under state law. By its signature below, A-E represents that it is not a target of Economic Sanctions.

Should Owner determine that A-E is a target of Economic Sanctions or is conducting prohibited transactions with sanctioned individuals or entities, that shall be grounds for rejection of A-E's proposal for the Service Order any time prior to execution, or, if determined after execution of a Service Order, shall be grounds for termination for default of the Agreement and the Service Order by Owner. Should Owner determine that any of the A-E's subconsultants is a target of Economic Sanctions or is conducting prohibited transactions with sanctioned individuals or entities, then, at Owner's discretion, that shall be grounds for rejection of A-E's proposal for the Service Order (if prior to award) or for required substitution of the sanctioned subconsultant, with the A-E to bear all costs of replacing the subconsultant.

I, the official named below, declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this certification is executed on _____ at _____, California.

[Date] [City]

A-E: _____

BY: _____
Signature

Type/Print Name

Title



San Juan Unified School District

Facilities Business Department

5320 Hemlock Street, Sacramento, California 95841

Telephone 916- 971-7283

Internet Web Site: www.sanjuan.edu

Melissa Bassanelli, Superintendent of Schools
Frank Camarda, Chief Operations Officer

RFP 24-220

ARCHITECT/ENGINEER POOL – 2024

Architectural Nexus Inc

DLR Group Inc

Lionakis

HMC

Studio W Associates Inc

19six Architects

JKAE

HED

SPECIALTY CONSULTANTS

Structural

Degenkolb Engineers

ZFA Structural Engineers

Civil

Warren Consulting Engineering

Schmidt Design Group

Verde Design

Low Voltage & Tech

KMM Services

Design/Build

DLR Group Inc. - Primary

Gary J Gery Architects Inc. - Alternate

Architectural Nexus, Inc. - Alternate

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: G-12

MEETING DATE: 05/14/2024

SUBJECT: Lease-Leaseback Contract Award for
Encina Preparatory High School Full Site Renovation

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

DEPARTMENT: Facilities

ACTION REQUESTED:

The superintendent is recommending that the board adopt Resolution No. 4129, awarding the lease-leaseback contract for Encina Preparatory High School (the “Project”) to Core West, Inc. dba Core Construction, pursuant to Education Code section 17406.

RATIONALE/BACKGROUND:

The project shall include, but not be limited to, the demolition of the existing classroom wings O & Q, and the construction of a science classroom building, the modernization of administration, library building, kitchen & food service areas, locker rooms, and light mod of existing classrooms. There will be sitework to upgrade underground utilities and prepare the ground for the new science building.

ATTACHMENT(S):

- A: Resolution No. 4129
B: Site Lease Agreement (available for reference at Facilities)
C: Facilities Lease Agreement (available for reference at Facilities)

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FISCAL IMPACT:

Current Budget: N/A
Additional Budget: N/A
Funding Source: Measure P
(Unrestricted Base, Supplemental, other restricted, etc.)
Current Year Only Ongoing:

LCAP/STRATEGIC PLAN:

Goal: N/A Focus: N/A
Action: N/A

Strategic Plan: N/A

PREPARED BY: Nicholas Arps, Director, Facilities, Construction & Modernization 

APPROVED BY: Frank Camarda, Chief Operations Officer 
Melissa Bassanelli, Superintendent of Schools 

RESOLUTION NO. 4129

**RESOLUTION BEFORE THE SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION APPROVING THE AWARD OF THE LEASE-LEASEBACK
CONTRACT TO CORE WEST, INC. dba CORE CONSTRUCTION FOR THE ENCINA
PREPARATORY HIGH SCHOOL FULL SITE RENOVATION PROJECT AND
SETTING FORTH THE WRITTEN BASIS FOR THIS DECISION TO AWARD**

WHEREAS, sections 17406 of the Education Code authorize school districts, including the San Juan Unified School District (“District”), to use the lease-leaseback procurement process;

WHEREAS, by Resolution No. 2831, the San Juan Unified School District Board of Education adopted the mandatory procedures and guidelines for use in lease-leaseback projects;

WHEREAS, consistent with those mandatory procedures and guidelines, the District issued Request for Proposals #24-221 (“RFP”), which (1) included a requirement for proposers to be prequalified under Section 20111.6 of the Public Contract Code, (2) included an estimate of the price of the Project, a description of preconstruction services to be provided, and a description of the facilities to be constructed; (3) included the key elements of the instrument to be awarded; (4) included a description of the criteria to be considered in evaluating the Proposals; and (5) included the scoring to be applied to the proposals; and

WHEREAS, ten (10) potential lease-leaseback proposers submitted Proposals in response to the RFP, which, the District has carefully examined

NOW, THEREFORE, pursuant to Education Code section 17406 the San Juan Unified School District Board of Education does hereby determine to award the Site Lease and Facilities Lease for the Project to Core West, Inc. dba as Core Construction for the following reasons:

1. The District determined to select its lease-leaseback provider for the Project based on best value in accordance with the evaluation criteria stated in the RFP.
2. Core Construction submitted a Proposal responsive to the RFP, which has been determined to present the best value to the District. The Proposal received a score of 344.25 out of a possible 400. This was the highest score received, with the other three shortlisted proposers receiving scores of 337.38 for Clark/Sullivan Construction, 330.50 for XL Construction, and 328.25 for Landmark.
3. Core Construction demonstrated that it will satisfy the skilled and trained workforce availability, as defined in Public Contract Code section 2601.
4. The initial amount of the Facilities Lease shall be \$95,000.00 for preconstruction services only. No construction services are authorized at this time without DSA approval.

The foregoing findings and decision to award were made by the San Juan Unified School District Board of Education at a meeting of the Board on May 14, 2024, by the following vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

Pam Costa, President
San Juan Unified School District
Board of Education

Attest:

Ben Avey, Clerk
San Juan Unified School District
Board of Education

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: G-13

MEETING DATE: 05/14/2024

SUBJECT: Lease Amendment No. 3 for Starr King TK/Kindergarten New Construction Project

CHECK ONE:

For Discussion:

For Action:

Report:

Workshop:

Recognition:

Emergency Action:

DEPARTMENT: Facilities

ACTION REQUESTED:

The superintendent is recommending that the board adopt Resolution No. 4130, approving the third amendment to the lease agreement for Starr King TK/Kindergarten new construction project between San Juan Unified School District and Otto Construction.

RATIONALE/BACKGROUND:

Amend the facilities lease contingencies and total base rent for a final reconciliation revised facilities lease amount of \$4,883,816.64.

ATTACHMENT(S):

A: Resolution No. 4130

B: Lease Amendment No. 3

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FISCAL IMPACT:

Current Budget: N/A

Additional Budget: N/A

Funding Source: Measure P

(Unrestricted Base, Supplemental, other restricted, etc.)

Current Year Only Ongoing:

LCAP/STRATEGIC PLAN:

Goal: N/A Focus: N/A

Action: N/A

Strategic Plan: N/A

PREPARED BY:

Nicholas Arps, Director, Facilities, Construction & Modernization 

APPROVED BY:

Frank Camarda, Chief Operations Officer 
Melissa Bassanelli, Superintendent of Schools 

RESOLUTION NO. 4130

**RESOLUTION BEFORE THE SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION APPROVING LEASE AMENDMENT #3
STARR KING TK/KINDERGARTEN
NEW CONSTRUCTION SJUSD PROJECT #147-9512-P1**

WHEREAS, sections 17406 of the Education Code authorize school districts, including the San Juan Unified School District (“District”), to use the lease-leaseback procurement process;

WHEREAS, the District Board of Education (“Board”) previously approved the award of the Site Lease and Facilities Lease to Otto Construction for this Project and Preconstruction Services per Resolution No. 3092; and

WHEREAS, Section 4.4.2.4.5 states all remaining funds shall be returned to the district by deduction of the Total Base Rent, as outlined in Amendment #3; and

WHEREAS, Exhibit C Lease Payment Schedule is amended to align with the revised final Facilities Lease Agreement total amount as outlined in Amendment #3; and

WHEREAS, Exhibit H. Section D Preconstruction Services is amended to align with final total amount as outlined in Amendment #3;

NOW, THEREFORE, the San Juan Unified School District Board of Education does hereby resolve as follows:

Section 1. The foregoing recitals are hereby adopted as true and correct.

Section 2. The Board approves the revised Lease Payment Schedule as shown in Lease Amendment #3

Preconstruction Services	\$236,000.00
Net Change by Amendment #3	<u>(\$4,812.96)</u>
Final Preconstruction Services	<u>\$231,187.04</u>
Total Base Rent - Amendment #1	\$4,924,000.00
Amendment #2	\$0.00
Net Change by Amendment #3	<u>(\$271,370.40)</u>
Final Total Base Rent	<u>\$4,652,629.60</u>
Total Facilities Lease Agreement w/ Preconstruction Services	<u>\$4,883,816.64</u>

The foregoing findings and decision to award were made by the San Juan Unified School District Board of Education at a meeting of the Board on May 14, 2024, by the following vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

**Pam Costa, President
San Juan Unified School District
Board of Education**

Attest:

**Ben Avey, Clerk
San Juan Unified School District
Board of Education**



San Juan Unified School District

Facilities Business Department

5320 Hemlock Street, Sacramento, California 95841

Telephone 916- 971-7283

Internet Web Site: www.sanjuan.edu

Melissa Bassanelli, Superintendent of Schools
Frank Camarda, Chief Operations Officer

**Lease Amendment #03
Starr King - New Construction
DSA App. # 02 – 119865 / Facilities Lease Agreement# 206076
SJUSD Project # 147-9512-P1**

Effective **May 14 2024**, the Facilities Lease Agreement dated **December 14, 2021**, between the San Juan Unified School District and **Otto Construction** for the **Starr King ES – New Construction** is amended as follows:

This amendment is to **reduce the Pre-construction and Total Base Rent (TBR) amounts and return unused Contingency and Allowance funds** to the Otto Construction Facilities Lease Agreement.

The Facilities Lease Agreement is modified as follows:

- A. Exhibit H, Section D: '*The District shall compensate Entity for performing the Preconstruction Services as follows: the fixed fee of \$236,000 \$231,187.04 ...*'
- B. Section 4.4.2 Total Base Rent: '*The TBR for the lease of the Project is ~~Four Million Nine Hundred and Twenty Four Thousand Dollars and No Cents (\$4,924,000.00)~~ Four Million Six Hundred Fifty Two Thousand Six Hundred Twenty Nine Dollars and Sixty Cents (4,652,629.60) (excluding precon services) subject to the provisions of any Contingency Funds set forth in this Article 4.*'
- C. Section 4.4.2.4.1 The Total Base Rent Includes: 'Construction Contingency Fund in the amount of ~~One Hundred Eighty Eight Thousand, Two Hundred and Ninety Dollars and No Cents (\$188,290.00)~~, Seventeen Thousand Seven Hundred Eighty Dollars and Twenty cents (\$17,780.20), which, except as set forth herein, shall cover all additional or extra Costs of the Work set forth in the Contract Documents as a result of all conditions and events that do not entitle Entity to a change order in accordance with Exhibit D, Article 15.01 of the Facilities Lease...''
- D. Section 4.4.2.4.2 The Total Base Rent Includes: 'Specific Allowances: Allowance #1 – Transite Pipe ~~\$10,000 in the amount of Zero Dollars and no cents (\$0.00)~~. Allowance #2 – Saturday Overtime = ~~\$32,000 in the amount of Zero Dollars and no cents (\$0.00)~~
- E. Section 4.4.2.4.3 The Total Base Rent Includes: 'District Contingency in the amount of ~~Five Hundred Thousand Dollars and no cents (\$500,000.00)~~ Four Hundred Forty-One Thousand One Hundred Thirty-Nine and Forty cents (\$441,139.40) which shall cover additional or extra costs to the project that entitle Entity to a change order in accordance with Exhibit D, Article 15.01 of the Facilities Lease...''

F. Exhibit C 'Lease Payment Schedule / TBR Calculator for Starr King New Construction # 147-9512-P1 - Replace in its entirety with:

Exhibit C		
Starr King K and T-K New Construction		
Lease Payment Schedule		
A	B	C
Item No	Month	Lease Payment
	<u>Preconstruction Phase</u>	\$ 231,187.04
	<u>Construction Phase</u>	
1	April 2022 Lease Payment	\$ 794,708.00
2	May 2022 Lease Payment	\$ 794,708.00
3	June 2022 Lease Payment	\$ 794,708.00
4	July 2022 Lease Payment	\$ 794,708.00
5	August 2022 Lease Payment	\$ 794,708.00
6	September 2022 Lease Payment	\$ 18,353.00
7	October 2022 Lease Payment	\$ -
8	November 2022 Lease Payment	\$ -
9	December 2022 Lease Payment	\$ -
10	January 2023 Lease Payment	\$ 11,213.00
11	February 2023 Lease Payment	\$ 11,212.00
12	March 2023 Lease Payment	\$ 11,212.00
13	April 2023 Lease Payment	\$ 11,212.00
14	May 2023 Lease Payment	\$ 11,212.00
15	June 2023 Lease Payment	\$ 11,212.00
	<u>Post-Construction Phase</u>	
16	July 2023 Lease Payment	\$ 11,212.00
17	August 2023 Lease Payment	\$ 11,212.00
18	September 2023 Lease Payment	\$ 11,212.00
19	October 2023 Lease Payment	\$ 11,212.00
20	November 2023 Lease Payment	\$ 11,212.00
21	December 2023 Lease Payment	\$ 11,212.00
22	January 2024 Lease Payment	\$ 11,212.00
23	February 2024 Lease Payment	\$ 11,212.00
24	March 2024 Lease Payment	\$ 11,212.00
25	April 2024 Lease Payment	\$ 11,212.00
26	May 2024 Lease Payment	\$ 11,212.00
27	June 2024 Lease Payment	\$ 11,212.00
	Total Lease Payments	\$ 4,193,710.00
	<u>Contingencies:</u>	
28	Construction Contingency	\$ 17,780.20
29	Owner Contingency	\$ 441,139.40
30	Allowances #1 & #2	\$ -
	Total Contingencies & Allowances	\$ 458,919.60
	Total Base Rent	\$ 4,652,629.60
	TOTAL FACILITIES LEASE AMOUNT	\$ 4,883,816.64

Original Facilities Lease Amount-Preconstruction Services	\$236,000.00
Change by Prior Amendment #1	\$4,924,000.00
Net Change Amendment #3	(-\$276,183.36)
Revised Preconstruction Services	\$231,187.04
Revised Total Base Rent	\$4,652,629.60
Revised Facilities Lease Amount Total	\$4,883,816.64

In all other respects, the terms and conditions of said Facilities Lease, including the exhibits thereto, remain in full force and effect.

San Juan Unified School District,

A school district organized and existing under the laws of the State of California

Otto Construction,

A California Corporation

By: _____

Nicholas Arps

Title: Director of Facilities, Construction & Modernization

By: _____

Melissa Barrenchea

Title: Project Manager

Federal Tax Identification Number:

94-1431805

By: _____

Frank Camarda

Title: Chief Operations Officer

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: G-14

MEETING DATE: 05/14/2024

SUBJECT: Lease Amendment No. 6 for John Barrett Middle School Modernization Project

CHECK ONE:

For Discussion:

For Action:

Report:

Workshop:

Recognition:

Emergency Action:

DEPARTMENT: Facilities

ACTION REQUESTED:

The superintendent is recommending that the board adopt Resolution No. 4131, approving the sixth amendment to the lease agreement for the John Barrett Middle School Modernization project between San Juan Unified School District and Landmark Construction.

RATIONALE/BACKGROUND:

Amend the facilities lease contingencies and total base rent for a final reconciliation of revised facilities lease amount of \$27,686,197.00.

ATTACHMENT(S):

A: Resolution No. 4131

B: Lease Amendment No. 6

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FISCAL IMPACT:

Current Budget: N/A

Additional Budget: N/A

Funding Source: Measure P

(Unrestricted Base, Supplemental, other restricted, etc.)

Current Year Only Ongoing:

LCAP/STRATEGIC PLAN:

Goal: N/A Focus: N/A

Action: N/A

Strategic Plan: N/A

PREPARED BY:

Nicholas Arps, Director, Facilities, Construction & Modernization 

APPROVED BY:

Frank Camarda, Chief Operations Officer 

Melissa Bassanelli, Superintendent of Schools 

RESOLUTION NO. 4131

**RESOLUTION BY THE SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION APPROVING LEASE AMENDMENT #6
JOHN BARRETT MIDDLE SCHOOL – MODERNIZATION
SJUSD PROJECT #004-9495-P1**

WHEREAS, sections 17406 of the Education Code authorize school districts, including the San Juan Unified School District (“District”), to use the lease-leaseback procurement process;

WHEREAS, the District Board of Education (“Board”) previously approved the award of the Site Lease and Facilities Lease to Landmark Modernization Contractors dba Landmark Construction for this Project per Resolution No. 2977; and

WHEREAS, Section 4.4.2.4.5 of the Facilities Lease Agreement states all remaining funds shall be returned to the district by deduction of the Total Base Rent, as outlined in Amendment #6;

NOW, THEREFORE, the San Juan Unified School District Board of Education does hereby resolve as follows:

Section 1. The foregoing recitals are hereby adopted as true and correct.

Section 2. The Board approves the revised Lease Payment Schedule as shown in Lease Amendment #6

Preconstruction Services	\$133,294.00
Net Change by Amendment #1	\$50,000.00
Final Preconstruction Services	<u>\$183,294.00</u>
Total Base Rent - Amendment #2 - 5	\$27,556,613.00
Net Change by Amendment #6	(-\$53,710.00)
Final Total Base Rent	<u>\$27,502,903.00</u>
Total Facilities Lease Agreement w/ Preconstruction Services	<u>\$27,686,197.00</u>

The foregoing findings and decision to award were made by the San Juan Unified School District Board of Education at a meeting of the Board on May 14, 2024, by the following vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

**Pam Costa, President
San Juan Unified School District
Board of Education**

Attest:

**Ben Avey, Clerk
San Juan Unified School District
Board of Education**



San Juan Unified School District

Facilities Business Department
5320 Hemlock Street, Sacramento, Ca 95841
916 971-7283 / Main number

Attachment B

Facilities Lease Amendment #06 BARRETT - MOD

**DSA App. 02-118610/Facilities Lease Agreement #006461 VR24-01386
SJUSD Project #004-9495-P1 (CW)**

Effective **5/14/2024**, the Facilities Lease Agreement **3/15/2021** between the San Juan Unified School District and **Landmark Construction** for the **BARRETT - MOD** is amended as follows:

Reconcile the final contingency dollars spent and credit back unused dollars. Credit back of Construction Contingency (\$3,560) and Owner Contingency (\$50,150). The following sections are amended:

1. Section 4.4.2.4.1 Construction Contingency is amended to be Four hundred thirteen thousand nine hundred fifty dollars (\$413,950.00)
2. Section 4.4.2.4.3 District Contingency is amended to be Three million one hundred thirty-four thousand four hundred fifty-six dollars (\$3,134,456.00).

Original Total Base Rent	\$133,294.00
Changes by Prior Amendments	\$27,606,613.00
Net Change by this Amendment	\$(53,710.00)
Revised Total Base Rent	\$27,686,197.00

In all other respects, the terms and conditions of said Facilities Lease, including the exhibits thereto, remain in full force and effect.

San Juan Unified School District,
A school district organized and existing under the laws
of the State of California

Landmark Construction
A California Corporation

By: _____
Nicholas Arps
Title: Director of Facilities, Construction &
Modernization

By: _____
Ryan Anderson
Title: Project Manager

By: _____
Frank Camarda
Title: Chief Operations Officer

Federal Tax Identification Number:
68-0485893

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: G-15

MEETING DATE: 05/14/2024

SUBJECT: Lease Amendment No. 6 for John Barrett Middle School New Construction Project

CHECK ONE:

For Discussion:

For Action:

Report:

Workshop:

Recognition:

Emergency Action:

DEPARTMENT: Facilities

ACTION REQUESTED:

The superintendent is recommending that the board adopt Resolution No. 4132, approving the sixth amendment to the lease agreement for John Barrett Middle School new construction project between San Juan Unified School District and Landmark Construction.

RATIONALE/BACKGROUND:

Amend the facilities lease contingencies and total base rent for a final reconciliation revised facilities lease amount of \$27,031,081.00.

ATTACHMENT(S):

- A. Resolution No. 4132
- B. Lease Amendment No. 6

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FISCAL IMPACT:

Current Budget: N/A

Additional Budget: N/A

Funding Source: Measure P

(Unrestricted Base, Supplemental, other restricted, etc.)

Current Year Only Ongoing:

LCAP/STRATEGIC PLAN:

Goal: N/A Focus: N/A

Action: N/A

Strategic Plan: N/A

PREPARED BY:

Nicholas Arps, Director, Facilities, Construction & Modernization 

APPROVED BY:

Frank Camarda, Chief Operations Officer 
Melissa Bassanelli, Superintendent of Schools 

RESOLUTION NO. 4132

**RESOLUTION BY THE SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION APPROVING LEASE AMENDMENT #6
BARRETT MIDDLE SCHOOL – NEW CONSTRUCTION
SJUSD PROJECT #004-9512-P1**

WHEREAS, sections 17406 of the Education Code authorize school districts, including the San Juan Unified School District (“District”), to use the lease-leaseback procurement process;

WHEREAS, the District Board of Education (“Board”) previously approved the award of the Site Lease and Facilities Lease to Landmark Modernization Contractors dba Landmark Construction for this Project per Resolution No. 2978; and

WHEREAS, Section 4.4.2.4.5 of the Facilities Lease Agreement states all remaining funds shall be returned to the district by deduction of the Total Base Rent, as outlined in Amendment #6;

NOW, THEREFORE, the San Juan Unified School District Board of Education does hereby resolve as follows:

Section 1. The foregoing recitals are hereby adopted as true and correct.

Section 2. The Board approves the revised Lease Payment Schedule as shown in Lease Amendment #6.

Preconstruction Services	\$101,632.00
Final Preconstruction Services	<u>\$101,632.00</u>
Total Base Rent - Amendment #2 - 5	\$27,694,533.00
Net Change by Amendment #6	<u>(\$765,084.00)</u>
Final Total Base Rent	<u>\$26,929,449.00</u>
Total Facilities Lease Agreement w/ Preconstruction Services	<u>\$27,031,081.00</u>

The foregoing findings and decision to award were made by the San Juan Unified School District Board of Education at a meeting of the Board on May 14, 2024, by the following vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

**Pam Costa, President
San Juan Unified School District
Board of Education**

Attest:

**Ben Avey, Clerk
San Juan Unified School District
Board of Education**



San Juan Unified School District

Facilities Business Department
5320 Hemlock Street, Sacramento, Ca 95841
916 971-7283 / Main number

Attachment B

Facilities Lease Amendment #06 BARRETT - New Construction

DSA App. 02-118610/Facilities Lease Agreement #006460 VR24-01771

SJUSD Project #004-9512-P1 (CW)

Effective 5/14/2024, the Facilities Lease Agreement 3/15/2021 between the San Juan Unified School District and **Landmark Construction** for the **BARRETT - New Construction** is amended as follows:

Reconcile the final contingency dollars spent and credit back unused dollars. Credit back of Construction Contingency (\$125,237) and Owner Contingency (\$639,847). The following sections are amended:

1. Section 4.4.2.4.1 Construction Contingency is amended to be Five hundred sixty-three thousand six hundred ninety-two dollars (\$563,692.00)
2. Section 4.4.2.4.3 District Contingency is amended to be One million one hundred twenty-seven thousand eight hundred seventy-seven dollars (\$1,127,877.00).

Original Total Base Rent	\$101,632.00
Changes by Prior Amendments	\$27,694,533.00
Net Change by this Amendment	\$(765,084.00)
Revised Total Base Rent	\$27,031,081.00

In all other respects, the terms and conditions of said Facilities Lease, including the exhibits thereto, remain in full force and effect.

San Juan Unified School District,
A school district organized and existing under the laws
of the State of California

Landmark Construction
A California Corporation

By: _____
Nicholas Arps
Title: Director of Facilities, Construction &
Modernization

By: _____
Ryan Anderson
Title: Project Manager

By: _____
Frank Camarda
Title: Chief Operations Officer

Federal Tax Identification Number:
68-0485893

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: G-16

MEETING DATE: 05/14/2024

SUBJECT: Short-term Personnel Technician

CHECK ONE:

For Discussion:

For Action:

Report:

Workshop:

Recognition:

Emergency Action:

DEPARTMENT: Human Resources

ACTION REQUESTED:

The superintendent is recommending that the board approve a short-term Personnel Technician position. This position will run from May 15, 2024, until October 23, 2024.

RATIONALE/BACKGROUND:

California Education Code Section 45103 requires that before employing a short-term employee, the governing board of a school district, at a regularly scheduled board meeting, shall specify the service required to be performed by the employee pursuant to the definition of "classification" in subdivision (a) of Section 45101, and shall certify the ending date of the service.

Human Resources requires the support of a short-term Personnel Technician to cover the area serviced by a current Personnel Technician who will be out on a board approved leave of absence until October 23, 2024.

ATTACHMENTS:

N/A

BOARD COMMITTEE ACTION/COMMENT:

N/A

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FINANCIAL DATA:

N/A

PREPARED BY: Shannon Rich, Human Resources Analyst, Human Resources *SR*

APPROVED BY: Rebecca Toto, Assistant Superintendent, Human Resources *RT*

Melissa Bassanelli, Superintendent of Schools *MB*

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: G-17

MEETING DATE: 05/14/2024

SUBJECT: Ratification of Curriculum, Standards,
Instructional and Student Services Committee Member

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

DEPARTMENT: Administration

ACTION REQUESTED:

The superintendent is recommending that the board ratify the selection of Patricia McGavock to serve as a committee member on the Curriculum, Standards, Instructional and Student Services (C&S) Committee.

RATIONALE/BACKGROUND:

Board member Tanya Kravchuk has appointed Patricia McGavock to serve on the C&S committee through July 2025. Per the committee bylaws, each individual board member shall appoint committee members subject to ratification by a majority vote of the board.

ATTACHMENT(S):

N/A

BOARD COMMITTEE ACTION/COMMENT:

N/A

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FISCAL IMPACT:

Current Budget: \$ N/A

Additional Budget: \$ N/A

Funding Source: N/A

(Unrestricted base, supplemental, other restricted, etc.)

Current Year Only: Ongoing:

LCAP/STRATEGIC PLAN:

Goal: N/A

Focus: N/A

Action: N/A

Strategic Plan: N/A

APPROVED BY: Melissa Bassanelli, Superintendent of Schools MB

:sc

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: I-1

MEETING DATE: 05/14/2024

SUBJECT: Proposed Strategic Plan

CHECK ONE:

For Discussion:

For Action:

Report:

Workshop:

Recognition:

Emergency Action:

DEPARTMENT: Administration

ACTION REQUESTED:

The superintendent is recommending that the board discuss the proposed strategic plan developed through extensive input and feedback from students, families, staff and community members.

Action anticipated: 05/28/2024

RATIONALE/BACKGROUND:

As shared with the board in February, last fall the district engaged in a strategic planning process by collecting input and feedback from the variety of educational partners that represent interests in our educational system including students, families, community members staff and others.

The voice collected was used by a representative group of approximately 60 individuals, known as the Core Planning Team, to identify four strategic directions that the district should focus its efforts on if we are to ensure our students are prepared and hopeful for their future. A group of approximately 25 comprised of primarily district leaders and students then considered the voice collected and worked to ensure the language suggested by the Core Team was achievable and could be aligned. The work of both teams yielded a draft strategic framework, published in March, that was then taken back to students, families and community members for feedback.

Based on the feedback collected on the draft strategic framework, the Core Planning and Design teams made revisions to the strategic framework. Those revisions were reviewed by the superintendent and the strategic planning facilitation team to produce the proposed strategic plan being presented with this item.

The proposed strategic plan maintains four focused strategic directions. 1) Advance student success; 2) Prioritize Equitable Practices; 3) Enhance Employee Support Systems; and 4) Invest in Efforts to Assist Students and Families to Empower Themselves. Each strategic direction identifies a purpose statement to help bring clarity to its intended meaning and priority outcomes that identify what we will see in San Juan Unified should our efforts in these areas be successful.

Additionally, the district's current mission and beliefs were reviewed and updated with feedback from both the Core Planning and Design teams to reflect where San Juan Unified stands today and to incorporate a vision of what we hope to achieve in the future. These proposed changes again reflect the varied and vital voice collected through the intensive engagement process.

The proposed strategic plan identifies the framework from which district efforts will be guided for the next three to five years. Should the board adopt the strategic plan, the next step will be for staff to operationalize the plan by developing specific action plans aligned to the strategic directions and their identified priority outcomes for the next school year. This work will begin in the summer and lead into the fall with feedback from our students, staff, families and community.

ATTACHMENTS:

- A - Presentation
- B - Proposed Strategic Plan
- C - Strategic Core Planning Team Participants
- D - Strategic Design Team Participants
- E - Round 1 Engagement Report (Jan 2024)
- F - Round 2 Engagement Report (April 2024)

BOARD COMMITTEE ACTION/COMMENT:

Facilities Committee: 03/05/2024

LCAP Parent Advisory Committee: 03/14/2024

Curriculum, Standards, Instructional & Student Services Committee: 03/20/2024

Community Advisory Committee: 03/20/2024

District English Learner Advisory Committee: 03/21/2024

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 12/18/2023, 05/06/2024

Board of Education: 02/13/2024

FISCAL IMPACT:

Current Budget: \$ 80,000 _____

Additional Budget: \$ _____ N/A

Funding Source: _____ Base _____

(Unrestricted Base, Supplemental, other restricted, etc.)

Current Year Only On-going

PREPARED BY: Amy Rovai Gregory, Director, Family Engagement and Partnership Development

APPROVED BY: Trent Allen, APR, Chief of Staff *TA*

Melissa Bassanelli, Superintendent of Schools *MB*

Proposed Strategic Plan

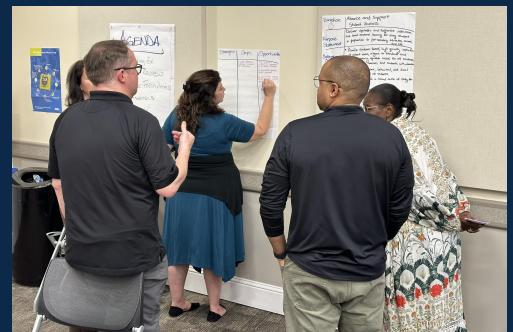
Board of Education

May 14, 2024

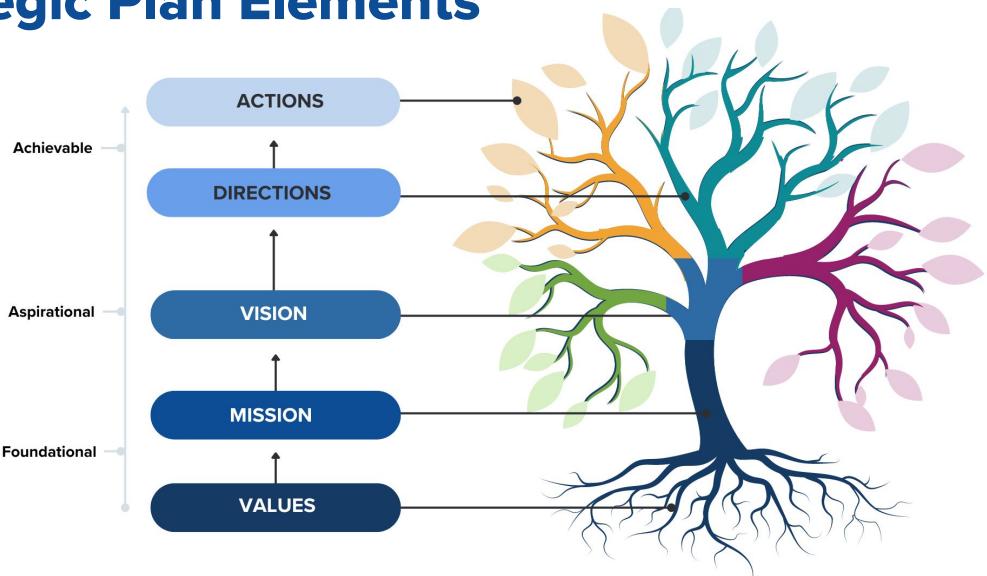


Strategic Planning Process

A tailored approach to meet the unique needs of San Juan Unified



Strategic Plan Elements



Overall Approach



Engagement Processes & Activities



FALL

- In-Person and Virtual Focus Groups
- Consensus Workshops
 - HS Student Session
 - Open Community Session
- Open Insight Sessions
 - K-8 Lunchtime Pop Ups
 - Hopes & Dreams Site Banners
- Interviews
- Surveys
- Thought Exchanges

SPRING

- In-Person and Virtual Focus Groups
- District Committees Feedback
- Community Gallery Walks
- School Pop Ups
- Thought Exchange



5

Fall Engagement



What do San Juan
Unified students need
to be **PREPARED** and
HOPEFUL for
their future?

6

DRAFT Strategic Framework (March)

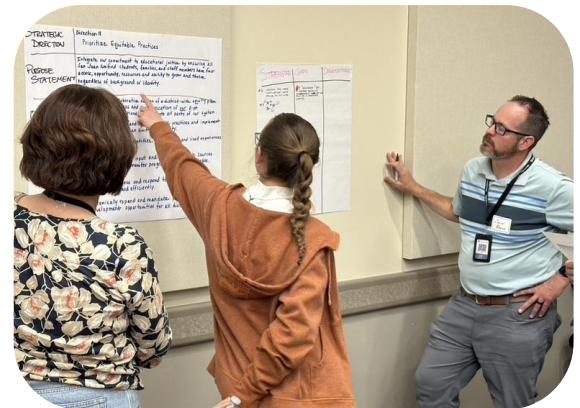


Direction I Advance Student Success

Direction II Prioritize Equitable Practices

Direction III Enhance Employee Support Systems

Direction IV Invest in Efforts to Assist Students and Families to Empower Themselves



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San Juan Unified School District DRAFT Strategic Framework

March 2024

In addition to our continued commitment to high expectations and academic achievement for all students, the following focus areas will guide the work of the San Juan Unified School District over the next five years.

STRATEGIC DIRECTION	DIRECTION I Advance Student Success	DIRECTION II Prioritize Equitable Practices	DIRECTION III Enhance Employee Support Systems	DIRECTION IV Invest in Efforts to Assist Students and Families to Empower Themselves
Purpose Statement	Deliver equitable and supportive instruction for every student in preparation for education, career and life	Integrate our commitment to educational justice by ensuring all San Juan Unified students, families and staff members have fair access, opportunity, resources and ability to grow and thrive regardless of background or identity	Strengthen employee support systems to unify and foster a thriving workforce	Expand meaningful engagement opportunities with students and families to amplify all voices, provide equitable access, and create safe and welcoming spaces across the district
Priority Outcomes	<ul style="list-style-type: none"> Provide high-quality instruction in all content areas based on established standards and best practice frameworks, ensuring equitable access and inclusion for all students Implement multi-layered academic, behavioral and social-emotional supports for all students based on their evolving needs Ensure varied learning experiences and a broad course of study for all students, from preschool to adult, including enrichment, advanced opportunities and preparation for education, career and life Utilize a data-driven assessment system that includes data-guided instruction and fosters equitable grading practices Cultivate safe, welcoming, inclusive, joyful and culturally responsive classroom and school environments 	<ul style="list-style-type: none"> Prioritize the co-design of a district-wide equity plan that builds awareness of and incorporates our 8 Point Commitment to Educational Justice into all parts of our system Define a common language and build shared understanding of equitable practices, and implement throughout the organization Seek and honor all identities, perspectives and lived experiences in every space Consciously gather input and analyze multiple sources of information to monitor progress toward equitable outcomes Celebrate progress and respond to barriers and gaps transparently and efficiently Systemically provide and enhance professional development opportunities for all district employees 	<ul style="list-style-type: none"> Seek and honor every voice to create an inclusive work environment where each employee feels valued, heard and respected Establish San Juan Unified as a competitive, destination district that attracts and retains staff representative of its diverse community Enhance onboarding, mentorship and professional growth opportunities for all staff members so that each employee is prepared both for their current role and future advancement in the district Provide timely, transparent, and accessible communication with all employees to increase trust and build meaningful relationships Explore and implement creative strategies to prioritize employee well-being so that each person can thrive personally and professionally Streamline and simplify internal practices and procedures to increase efficiencies and balance workloads 	<ul style="list-style-type: none"> Strengthen relationships with and among students, families and staff through trust and partnership Create opportunities to expand voice, mentorship, civic engagement and supportive learning experiences for all students and families Expand career exploration and real world experiences to build student autonomy and life skills Broaden restorative practices through student led interventions and alternatives to discipline Develop and implement strategies that celebrate and honor student progress, success and strong family engagement Enhance district partnerships to help students and families address mental health, social-emotional and physical needs Ensure safe and supportive environments for all students, staff and families through partnership and collaboration Identify and address barriers that limit access to programs and services

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Spring Engagement Findings



DRAFT Strategic Direction I

- **STRENGTHS**
 - Will sustain high academic achievement and address current gaps
 - Clarity of language and purpose
 - Alignment with current district objectives and initiatives
- **CHALLENGES**
 - Concerns about EL support and curriculum
 - Consistency in implementation of culturally responsive practices
 - Support for SpEd students and families
- **SUGGESTIONS FOR IMPROVEMENT**
 - Prioritize SEL support
 - Expand staff capacity
 - Ensure needs of all students are being met, especially SpEd and EL

DRAFT Strategic Direction II

- **STRENGTHS**
 - Support for refugees and foster youth
 - Access and support to all students
 - Increased capacity of counselors
- **CHALLENGES**
 - Language and clarity of direction
 - Communication of available supports and how to access them
 - Concerns about focus on equity over academics
- **SUGGESTIONS FOR IMPROVEMENT**
 - Clarify language and purpose
 - Address economic mobility and support
 - Ensure inclusion of SpEd in equity work
 - Strengthen professional development in this area

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Spring Engagement Findings



DRAFT Strategic Direction III

- **STRENGTHS**
 - Appreciate collaborative efforts to support staff
 - Agreement that it will sustain high academic achievement
 - Clarity of language and purpose
- **CHALLENGES**
 - Clarity of “destination district”
 - Ability to provide adequate support and compensation
- **SUGGESTIONS FOR IMPROVEMENT**
 - Motivation for all staff to participate in professional development
 - Improve transparency
 - Emphasize employee safety and inclusivity

DRAFT Strategic Direction IV

- **STRENGTHS**
 - Language and content of direction
 - Respectful treatment of cultural differences
 - Demonstration of diversity and inclusivity
 - Focus on supporting families in navigating the system
 - Implementation of restorative practices
- **CHALLENGES**
 - Inconsistency of welcoming and support across buildings
 - Need for proactive, early interventions
 - Lack of before/after school care
- **SUGGESTIONS FOR IMPROVEMENT**
 - Emphasis on inclusive, supportive environments for all
 - Equitable access to resources

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Proposed Strategic Plan



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Overarching statement



In addition to our **continued commitment to high expectations and academic achievement for all students**, the following focus areas will guide the work of the San Juan Unified School District over the next five years.

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Strategic Direction I

STRATEGIC PRIORITY I	Advance and Support Student Success
<i>Purpose Statement</i>	Deliver high quality, equitable and supportive academic instruction and social-emotional learning for every student in preparation for post-secondary education, career and life
<i>Outcome Goals</i>	<ol style="list-style-type: none">1. Evidence-based instruction aligned to state standards and frameworks is provided, ensuring equitable access for all students, including student groups identified by data as high priority2. Culturally responsive academic, behavioral and social emotional supports and interventions are implemented for all students3. A variety of rich learning experiences and a broad course of study are provided and accessible to all students, from preschool to adult4. Resources, enrichment and advanced opportunities are provided to all learners, ensuring preparation for post-secondary education, career and life5. Data-guided instruction and equitable grading practices informed by a comprehensive assessment system are used at all levels6. Physically and emotionally safe, welcoming, inclusive, joyful and culturally responsive classrooms and school environments are cultivated throughout San Juan Unified

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Strategic Direction II

STRATEGIC PRIORITY II	Prioritize Equitable Practices
<i>Purpose Statement</i>	Integrate our commitment to educational justice throughout San Juan Unified by ensuring all students, families and staff members have fair access, opportunity and resources to learn, grow and thrive regardless of background, identity or ability
<i>Outcome Goals</i>	<ol style="list-style-type: none">1. The collaborative design of a district-wide equity plan that builds awareness our 8-pt Commitment to Educational Justice is prioritized and applied in all parts of our system2. A shared understanding and implementation of equitable practices is established throughout the San Juan Unified community3. Initiatives and actions recognize and address the needs of students groups identified by data as high priority4. All identities, perspectives and lived experiences are recognized, included and honored5. Input is consistently gathered and multiple sources of information are analyzed to evaluate progress and achievement of equitable learning outcomes6. Progress and growth are celebrated, and barriers and gaps are transparently and efficiently addressed7. Professional development opportunities are systemically expanded and accessible for all district employees

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Strategic Direction III

STRATEGIC PRIORITY III	Enhance Employee Systems and Supports
Purpose Statement	Innovate and strengthen systems to prioritize employee wellness and cultivate a thriving workforce
Outcome Goals	<ol style="list-style-type: none"> Employee voices are sought out and honored to ensure a work environment where each individual feels valued, heard and respected Each employee will thrive personally and professionally through prioritized creative strategies that support well-being Timely, transparent and accessible communication with all employees is prioritized, increasing trust, meaningful relationships and connectedness Internal practices and procedures are streamlined and regularly evaluated to increase efficiencies and balance workloads Onboarding, mentorships and professional growth opportunities for all employees are enhanced so that each staff member is prepared both for their current role and future advancement in the district San Juan Unified is known as an innovative, evolving, collaborative and desirable district that attracts and retains high quality staff representative of our diverse community

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Strategic Direction IV

STRATEGIC PRIORITY IV	Engage Students, Families and Community as Valued Educational Partners
Purpose Statement	Expand meaningful engagement opportunities with students, families and community members to amplify all voices, provide equitable access, and create safe and welcoming environments throughout the district
Outcome Goals	<ol style="list-style-type: none"> Relationships with and among students, families, community and staff are strengthened in order to increase trust, partnership and student success Community partnerships that help students and families access resources to support mental health as well as social-emotional, physical and academic needs, are enhanced Safe and supportive environments for all students, staff and families are cultivated through positive and collaborative partnerships Opportunities to expand voice, advocacy, mentorship, civic engagement and supportive learning experiences are created for all students and families Apply and grow restorative practices that are reflective of our diverse student community and incorporates their voice Career exploration and real-world experiences to build student autonomy and life skills are expanded Family-centered activities that celebrate and honor student progress and success are developed and implemented Barriers that limit access to programs and services for students and families are addressed, with an emphasis on groups identified by data as high priority

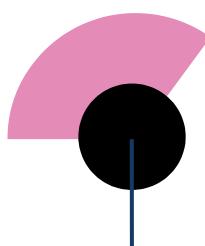
16

Additional Plan Elements



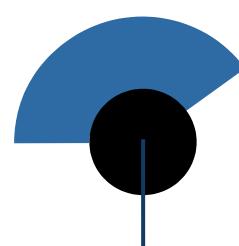
Values

We start by identifying what we hold close and what is most important



Mission

We then identify the work we do every day because of what we value



Vision

Finally, we identify what will happen in the future if we accomplish our mission

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Core Values

CURRENT Shared Values	PROPOSED Core Values
INCLUSIVITY – San Juan Unified is committed to cultivating an inclusive community of belonging with genuine respect for diverse cultures, identities, and abilities.	BELONGING – We create a community that cultivates welcoming and inclusive environments with genuine respect for our diversity of cultures, identities and abilities
REAL WORLD KNOWLEDGE - San Juan Unified is committed to creating environments and providing experiences that build and apply relevant skills and knowledge for the real world.	RELEVANCE – We create experiences and environments where each learner can explore and apply skills and knowledge that align with evolving careers and workplaces.
VOICE - San Juan Unified is committed to hearing all voices, acknowledging, validating, and responding as they continuously grow together as a community.	VOICE – We honor and affirm all voices of our school community and encourage them to share their perspectives to help improve and shape what we do and how we do it.
SOCIAL AND EMOTIONAL INTELLIGENCE - San Juan Unified is committed to creating a culture that embraces, teaches, models, and applies social and emotional intelligence in all interactions with all stakeholders.	SOCIAL AND EMOTIONAL INTELLIGENCE – We create a culture that teaches, models and applies social and emotional intelligence in all interactions with each other.
PERSEVERANCE - San Juan Unified is committed to creating a learning atmosphere that models and instills perseverance through adversity and encourages risk-taking.	RESILIENCE – We create nurturing schools and programs that inspire each learner to continue to persevere, gain strength and develop the confidence to excel beyond challenges.
	CHAMPIONING – We support and advocate for those in our San Juan Unified community who are disproportionately impacted or marginalized by circumstances beyond their control.
	INNOVATION – We embrace and encourage creative thinking and learning environments that transform ideas into actionable solutions.

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Mission Statement

CURRENT	PROPOSED
To empower all in its inclusive learning community to contribute and thrive in a radically evolving world.	We partner with our San Juan Unified community in setting high expectations rooted in equity and unity to create supportive learning experiences in which all students, families and staff can achieve, excel and thrive.

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Vision Statement

CURRENT	PROPOSED
	We inspire each student to make a positive impact in their world by honoring the unique identity of each person and upholding inclusive and equitable practices that lead to individual and collective growth, achievement and educational justice.

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Next Steps



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San Juan Unified
SCHOOL DISTRICT

Questions?



San Juan Unified School District

PROPOSED Strategic Plan

May 2024

In addition to our continued commitment to high expectations and academic achievement for all students, the following focus areas will guide the work of the San Juan Unified School District over the next five years.

STRATEGIC PRIORITY I	Advance and Support Student Success
<i>Purpose Statement</i>	Deliver high quality, equitable and supportive academic instruction and social-emotional learning for every student in preparation for post-secondary education, career and life
<i>Outcome Goals</i>	<ol style="list-style-type: none"> 1. Evidence-based instruction aligned to state standards and frameworks is provided, ensuring equitable access for all students, including student groups identified by data as high priority 2. Culturally responsive academic, behavioral and social emotional supports and interventions are implemented for all students 3. A variety of rich learning experiences and a broad course of study are provided and accessible to all students, from preschool to adult 4. Resources, enrichment and advanced opportunities are provided to all learners, ensuring preparation for post-secondary education, career and life 5. Data-guided instruction and equitable grading practices informed by a comprehensive assessment system are used at all levels 6. Physically and emotionally safe, welcoming, inclusive, joyful and culturally responsive classrooms and school environments are cultivated throughout San Juan Unified

San Juan Unified School District

PROPOSED Strategic Plan

May 2024

In addition to our continued commitment to high expectations and academic achievement for all students, the following focus areas will guide the work of the San Juan Unified School District over the next five years.

STRATEGIC PRIORITY II	Prioritize Equitable Practices
<i>Purpose Statement</i>	<p>Integrate our commitment to educational justice throughout San Juan Unified by ensuring all students, families and staff members have fair access, opportunity and resources to learn, grow and thrive regardless of background, identity or ability</p>
<i>Outcome Goals</i>	<ol style="list-style-type: none"> 1. The collaborative design of a district-wide equity plan that builds awareness our 8-pt Commitment to Educational Justice is prioritized and applied in all parts of our system 2. A shared understanding and implementation of equitable practices is established throughout the San Juan Unified community 3. Initiatives and actions recognize and address the needs of students groups identified by data as high priority 4. All identities, perspectives and lived experiences are recognized, included and honored 5. Input is consistently gathered and multiple sources of information are analyzed to evaluate progress and achievement of equitable learning outcomes 6. Progress and growth are celebrated, and barriers and gaps are transparently and efficiently addressed 7. Professional development opportunities are systemically expanded and accessible for all district employees

San Juan Unified School District

PROPOSED Strategic Plan

May 2024

In addition to our continued commitment to high expectations and academic achievement for all students, the following focus areas will guide the work of the San Juan Unified School District over the next five years.

STRATEGIC PRIORITY III	Enhance Employee Systems and Supports
<i>Purpose Statement</i>	Innovate and strengthen systems to prioritize employee wellness and cultivate a thriving workforce
<i>Outcome Goals</i>	<ol style="list-style-type: none"> 1. Employee voices are sought out and honored to ensure a work environment where each individual feels valued, heard and respected 2. Each employee will thrive personally and professionally through prioritized creative strategies that support well-being 3. Timely, transparent and accessible communication with all employees is prioritized, increasing trust, meaningful relationships and connectedness 4. Internal practices and procedures are streamlined and regularly evaluated to increase efficiencies and balance workloads 5. Onboarding, mentorships and professional growth opportunities for all employees are enhanced so that each staff member is prepared both for their current role and future advancement in the district 6. San Juan Unified is known as an innovative, evolving, collaborative and desirable district that attracts and retains high quality staff representative of our diverse community

San Juan Unified School District

PROPOSED Strategic Plan

May 2024

In addition to our continued commitment to high expectations and academic achievement for all students, the following focus areas will guide the work of the San Juan Unified School District over the next five years.

STRATEGIC PRIORITY IV	Engage Students, Families and Community as Valued Educational Partners
<i>Purpose Statement</i>	Expand meaningful engagement opportunities with students, families and community members to amplify all voices, provide equitable access, and create safe and welcoming environments throughout the district
<i>Outcome Goals</i>	<ol style="list-style-type: none"> 1. Relationships with and among students, families, community and staff are strengthened in order to increase trust, partnership and student success 2. Community partnerships that help students and families access resources to support mental health as well as social-emotional, physical and academic needs, are enhanced 3. Safe and supportive environments for all students, staff and families are cultivated through positive and collaborative partnerships 4. Opportunities to expand voice, advocacy, mentorship, civic engagement and supportive learning experiences are created for all students and families 5. Apply and grow restorative practices that are reflective of our diverse student community and incorporates their voice 6. Restorative practices that are reflective of our diverse student community and incorporates their voice are grown and applied 7. Career exploration and real-world experiences to build student autonomy and life skills are expanded 8. Family-centered activities that celebrate and honor student progress and success are developed and implemented 9. Barriers that limit access to programs and services for students and families are addressed, with an emphasis on groups identified by data as high priority



San Juan Unified School District

PROPOSED Strategic Plan

May 2024

Core Values

An organization's core values are the deeply ingrained principles that guide all actions. Your core values express what you stand for, what you believe in, and what is closest to your heart.

CURRENT	PROPOSED
INCLUSIVITY – San Juan Unified is committed to cultivating an inclusive community of belonging with genuine respect for diverse cultures, identities, and abilities.	BELONGING – We create a community that cultivates welcoming and inclusive environments with genuine respect for our diversity of cultures, identities and abilities.
REAL WORLD KNOWLEDGE - San Juan Unified is committed to creating environments and providing experiences that build and apply relevant skills and knowledge for the real world.	RELEVANCE – We create experiences and environments where each learner can explore and apply skills and knowledge that align with evolving careers and workplaces.
VOICE - San Juan Unified is committed to hearing all voices, acknowledging, validating, and responding as they continuously grow together as a community.	VOICE – We honor and affirm all voices of our school community and encourage them to share their perspectives to help improve and shape what we do and how we do it.
SOCIAL AND EMOTIONAL INTELLIGENCE - San Juan Unified is committed to creating a culture that embraces, teaches, models, and applies social and emotional intelligence in all interactions with all stakeholders.	SOCIAL AND EMOTIONAL INTELLIGENCE – We create a culture that teaches, models and applies social and emotional intelligence in all interactions with each other.
PERSISTENCE - San Juan Unified is committed to creating a learning atmosphere that models and instills perseverance through adversity and encourages risk-taking.	RESILIENCE – We create nurturing schools and programs that inspire each learner to continue to persevere, gain strength and develop the confidence to excel beyond challenges.
	CHAMPIONING – We support and advocate for those in our San Juan Unified community who are disproportionately impacted or marginalized by circumstances beyond their control.
	INNOVATION – We embrace and encourage creative thinking and learning environments that transform ideas into actionable solutions.



Attachment B

San Juan Unified School District

PROPOSED Strategic Plan

May 2024

Mission Statement

Your mission statement communicates what you do daily as an organization in response to your values.

CURRENT	PROPOSED
To empower all in its inclusive learning community to contribute and thrive in a radically evolving world.	We partner with our San Juan Unified community in setting high expectations rooted in equity and unity to create supportive learning experiences in which all students, families and staff can achieve, excel and thrive.

Vision Statement

Your vision statement uses aspirational language to communicate the purpose and express the change you mean to affect the world.

CURRENT	PROPOSED
	We inspire each student to make a positive impact in their world by honoring the unique identity of each person and upholding inclusive and equitable practices that lead to individual and collective growth, achievement and educational justice.

Strategic Core Planning Team Participants

First Name	Last Name	Title	Location
Teri	Hofstetter	Administrative Assistant / CSEA rep.	Nutrition Services / CSEA
Meghan	Jorgenson	Administrator	Early Childhood Education
Megan	Itza-Smith	Analyst	Human Resources
Deryn	Campbell	Associate Budget Analyst	Fiscal Services
Candice	Wilder	Central Review Administrator	Pupil Personnel Services
Armoni	Easley	Community Partner	Project Optimism
Linda	Martin	Community Partner	Kiwanis / Aerospace Museum
Heather	Gonzalez	Community Partner	Mutual Assistance Network
Hawa	Amiri	Community Partner	CAIR
Analese	McDaniel	Community Relations Technician / Parent	Community Relations
Linda	Benson	Community Safety Specialist	Safe Schools
Colleen	Cadwallader	Coordinator / Exec. Director / Parent	Family and Community Engagement / San Juan Education Foundation
Cheryl	Dultz	Cultivating Leaders Mentor	Student Support Services
Colin	Bross	Director	Maintenance and Operations
Holly	Cybulski	Director	Elementary and K-8 Schools
Brett	Wolfe	Director	Adult Education / School to Career
Dominic	Covello	Director	Special Education
Madeline	Garcia	ELD Teacher	Cameron Ranch Elementary
Kimber	Rice	Facilitator / Parent / CAC representative	Family and Community Engagement
Leonore	Walker	Instructional Assistant II / Parent	Arden Middle School
Sandra	Butorac	Interim Director	Student Support Services
Paula	Baucom	K-12 Curriculum Program Specialist	Professional Learning and Curriculum Innovation
Heather	Brandt	K-12 Curriculum Program Specialist	Professional Learning and Curriculum Innovation
Elizabeth	Julienne	K-12 Curriculum Program Specialist	Professional Learning and Curriculum Innovation
Laura	Mulder	LCAP Analyst	Local Control and Accountability Plan
Tracie	Locke	Lead Counselor	Teaching and Learning
Laura	Fry	Manager	Business Support Services
Michelle	Fischer	Manager	Risk Management
Marcela	Jimenez	Parent (English Learner)	Carriage Drive Elementary
Sandra	Calzada	Parent (English Learner)	Arden Middle School
Karen	Hanks	Principal	Kingswood K-8
Aliceon	Sloss	Principal	Cameron Ranch Elementary
Roxanne	Stellmacher	Principal	Lichen K-8
Melissa	Schupp	Principal / Parent	Greer Elementary
Cameron	Pickett	Research Analyst	Assessment, Evaluation and Planning
Melissa	Tachiera	School Community Worker	Attendance Improvement Program
Taryn	Dyke	Secretary	Coyle Avenue Elementary
Charlie	Harney	Student	Del Campo High School
Makayla	Fambrini	Student	Casa Roble Fundamental High School
Karin	Nicholson	Student / SJYVA	Del Campo High School / San Juan Youth Voice Advocates
Jocelyn	Monroe-Holder	Student / SJYVA / SSAC	Meraki High School
Dons	Hicks	Student / SJYVA	Encina Preparatory High School
Alain (AJ)	Rodriguez	Student	Encina Preparatory High School
Aaliyah	Aguilar	Student	Encina Preparatory High School
Megan	Robinson	Supervisor	McKinney-Vento / Attendance Improvement Program
Susan	Elder	Teacher	Gold River Discovery Center
Robin	Lintz	Teacher	Gold River Discovery Center
Amy	Day	TOSA	Equity and Student Achievement
Gary	Coartney	Vice Principal	Del Campo High School
Amanda	Belt	Vice Principal	San Juan High School
Matthew	Strinden	Vice Principal	Adult Education

Strategic Design Team Participants

First Name	Last Name	Title	Location
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Kristan	Schnepp	Asst. Superintendent	Secondary
Rebecca	Toto	Asst. Superintendent	Human Resources
Trent	Allen	Chief of Staff	Community Relations
Luis	Cruz Solache	Coordinator	Family and Community Engagement
Lori	Vine	Coordinator	Equity and Student Achievement
Adara	Clark-Gunn	Data & Compliance Tech / President, CSEA	Special Education / CSEA
Nicole	Kukral	Director	Professional Learning and Curriculum Innovation
Omar	Field-Ridley	Director	Equity and Student Achievement
Dominic	Covello	Director	Special Education
Gianfranco	Tornatore	Director	Continuous Improvement and LCAP
Raj	Rai	Director	Communication
Sneh	Nair	Director	Nutrition Services
Amy	Slavensky	Interim Deputy Superintendent	Schools and Student Support
Barry	Roth	President	SJTA
Greta	Scholtes	Principal	Encina Preparatory High School
David	Levis	Principal	San Juan High School
Melanie	Allen	Principal / SJPEC rep.	Mary Deterding Elementary
Damon	Smith	Principal / SJPEC rep.	Katherine Johnson Middle School
Genoveva	Mendoza Navarre	Program Manager	English Learner and Multicultural Education
Peter	Skibitzki	Senior Director	Technology Services
Sarah	Silagi	Student / SSAC	Bella Vista High School
Trinity	Solano-Hale	Student / SSAC	Casa Roble Fundamental High School
Mohammad	Radmanesh	Supervisor	Refugee/Newcomer Support

Strategic Planning
Community Engagement Report
San Juan Unified School District

January 22, 2024

prepared by CESO Communications

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S ● **o**



01 | Background •

In the Fall of 2023, CESO Communications (CESO) contracted with San Juan Unified School District (San Juan Unified) to facilitate a strategic planning process to guide the work of the district over the next five years.

Following initial conversations with the district, as well as a review of the district's previous strategic work, community surveys and additional district data, CESO conducted a comprehensive community engagement process that included students, staff, parents and community members in November and December 2023.

The goal of this initial phase of the strategic planning process was to provide a variety of engagement activities that allowed individuals from across community member groups to share their input. A combination of in-person and virtual engagements was used to solicit insight from community members, which allowed participants to share their thoughts at times and in ways that were most convenient for them. There was also an effort to intentionally include student voices in the process to create a strategic plan that represents the true mission and vision of the school system.

Insights from these engagements have been included in this report. This report, along with other district reports, strategic initiatives and data will inform the work of the Core Planning Team and Design Team when they meet in January and February to develop a draft strategic plan.

02 | Engagement Process & Activities •

In November and December 2023, the district held several in-person and virtual engagements that included personal interviews; focus groups and collaborative workshops with current students, staff, parents/families, alumni and community members; and open input opportunities for students and families. An online conversation was also available for all members of the San Juan Unified community to weigh in with their thoughts and insights via ThoughtExchange.

To keep participants focused on the future and not on current topics or concerns, the district set out to answer the following key question:

**What do San Juan Unified students need to be
PREPARED for their next step and HOPEFUL for their future?**

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Engagement Formats & Participation

San Juan students, families, staff and community members were invited to participate in a variety of engagements. In-person sessions included focus groups, open insight opportunities, and consensus workshops. Interviews were conducted with school board members, the superintendent and identified community leaders. Virtual conversations included using the district's ThoughtExchange platform, surveys and Zoom-based focus groups.

** An analysis of the insights from all engagements is included later in this report as part of the key themes and findings.*

Focus Groups

Several in-person and virtual focus groups were held to gather feedback from staff, parents, and community members. In each session, participants were asked to provide their insights about the current reality for students in San Juan Unified, suggestions for improvement, and ideas for further supporting district students and families.

Consensus Workshops

San Juan students, families, staff and community members were invited to participate in facilitated engagements. Each in-person session was structured as a facilitated consensus workshop, providing opportunity for participants to provide their insights through individual brainstorming as well as small and large group discussions.

** An analysis of the ideas from the consensus workshops is incorporated into the key themes later in this report, with the raw data included in the appendix.*

Student Session

The student consensus workshop involved 85 high school students representing all the high schools in the district. Conversations focused on two workshop questions: what do students need to feel prepared and hopeful for their future, and what do students need to feel a sense of belonging in their school.





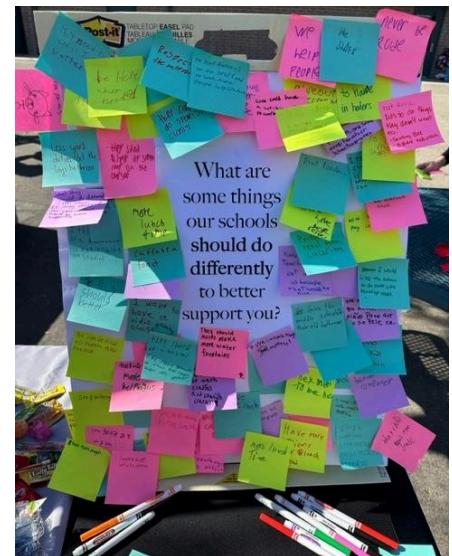
Open Community Session

Two open community consensus workshops were held for all staff, families and community members. Conversations focused on two questions: what do students need to feel prepared and hopeful for their future, and what do parents/families need to feel welcomed, valued and motivated to be involved in their student's education.



Open Insight Sessions

The district offered several open insight sessions, including pop-up engagements at K-8 sites to get student insights on hopes and dreams as well as suggestions for improvement. In addition, the district posted banners at schools for parents/families to offer their insights.





Interviews

CESO Communications also conducted personal interviews with each member of the San Juan Unified School Board and the Superintendent. Interview questions were similar to the questions asked in other focus groups, with an additional focus on leadership of the district, their hopes for the strategic planning process, and their visions for the future.

In addition, the district identified community leaders for personal interviews. Again, the interviews focused on what the district should focus on in the future to better support students and families, with an additional focus on community and civic partnerships.

Surveys

The district also included surveys for identified audiences to ensure wide representation in the engagement phase. Students in middle school and high school were administered a survey in November 2023. Questions were similar to those of the focus groups, seeking insight on how prepared students feel for life after graduation, what skills they feel they need for adulthood, and ideas about what teachers and staff can do to help them feel more prepared and valued in the district.

In total, 438 students participated, 98% of whom took the survey in English, and a small percentage in Russian. Responses were nearly evenly distributed among grade levels:

- Grade 6 - 10%
- Grade 7 - 15%
- Grade 8 - 15%
- Grade 9 - 18%
- Grade 10 - 17%
- Grades 11 - 14%
- Grade 12 - 11%

The district also surveyed community partners. Again, questions focused on what skills students need for adulthood and how the district can support students and families.

ThoughtExchange

In addition to the engagements outlined above, all members of the San Juan Unified School District community were invited to participate in an **online conversation** via the district's ThoughtExchange platform. The conversation was combined with data gathering for the district's annual LCAP process, focusing on what the district is doing well and what it can do better to support students and families. The exchange was open for participation for six weeks in October and November 2023, and garnered significant input, with more than 600 participants providing nearly 577 thoughts. The majority (94%) of participants in the exchange did so in English. Additional responses were captured in Spanish (2%), Russian (2%) and Persian (1%).



* An analysis of the ideas shared in the ThoughtExchange is incorporated into the key themes later in this report, with a more detailed analysis included in the appendix.

PROCESS

The digital engagement platform ThoughtExchange was used to facilitate the online engagement of San Juan Unified students, staff, parents and community members by providing a virtual environment in which they were able to respond to some brief survey questions and a general prompt question. Participants were also able to rate and respond to the comments of other respondents.

ThoughtExchange operates as both a survey on some baseline questions and an online conversation in which participants generate ideas and feedback and build a sense of consensus on topics. Participation is not only about posting responses but also about sharing reactions, feelings and suggestions about the comments and responses of others.

TIMELINE & COMMUNICATION

The platform was open from October 5 - November 18, 2023. The district shared messaging about the exchange through various channels to invite and encourage participation.

EXCHANGE QUESTION

As for the virtual conversation, participants were asked to engage with the following prompt question:

What are some things our schools are doing well to support students and families, and what are some things our schools should do differently to improve support for students and families?

PARTICIPATION

Of those who participated in the virtual discussion, engagement was strong. The online platform garnered significant input, with over 600 participants providing nearly 600 thoughts.

Participants	Thoughts	Ratings
608	577	15,629
Last activity: 30+ days ago	0.9 thoughts / participant	25.7 ratings / participant

Participation Demographics

While participants could choose more than one affiliation with the district, the exchange included mostly parents/guardians (80%), followed by district staff (17%). A small number of participants identified as community members (2%) and a handful identified as current students. The majority (54%) of parent respondents said they had children at the elementary level, with approximately one-quarter noting association with middle school (26%) or high school (28%).



The racial/ethnic demographics show 61% of respondents identifying as white, 15% as Hispanic or Latino/a/x , 9% noting two or more races, and 5% as African American or Black. Approximately 15% of respondents opted not to identify their race/ethnicity.

Additionally, respondents were asked to identify their relationship with special populations, with 5% noting they had a student with disabilities, 2% each as English learners and/or socioeconomically disadvantaged, and 1% each as homeless and/or foster youth.

Level of Engagement

The exchange also indicated a strong level of engagement, with a ratings ratio of 27. The ratings ratio measures engagement in the exchange topic. A ratings ratio of 15 or higher shows strong engagement.

ADDITIONAL EXCHANGE

An additional ThoughtExchange was conducted with after-school staff, allowing their insights to be included in the research phase of the planning process. Twenty-two staff participated in the exchange, and 25 thoughts were submitted. The majority (71%) of participants identified as Bridges staff, whereas 29% identified with Discovery Club. The vast majority (95%) of participants have worked in the district for more than five years, with the other 5% identifying a district tenure of one to three years.

** An analysis of the ideas shared in the After School Program Staff ThoughtExchange is incorporated into the key themes later in this report, with a more detailed analysis included in the appendix.*



03 | Key Themes & Findings •

In reviewing the feedback from the various engagements, the following themes emerged. As noted above, detailed insights and data from students, staff, parents and community members are included in the Appendix.

Executive Summary

While key themes and topics varied by audience, there were a few areas in which there was common agreement about what San Juan Unified students need to be prepared for their next step and hopeful for their future.

- **Life Skills** – All groups agreed on the importance of students learning practical skills important for adulthood, including financial literacy, time management, budgeting, cooking, setting up a home, etc.
- **Communication Skills** – Effective communication, including both in-person and non-verbal communication, was cited as essential to student success at any stage of life.
- **Critical Thinking and Decision-Making** – The ability to read, analyze and critically evaluate information to make informed decisions was identified by most audiences as critical to future student success.
- **Interpersonal Skills** – Like communication and critical thinking, the ability to effectively interact, communicate and collaborate with others – encompassing qualities such as active listening, empathy, teamwork, conflict resolution, and building positive relationships – are necessary for students to advance into life after graduation.
- **Goal Setting and Self-Advocacy** – Several groups identified the need for all students to help learn the importance of goal setting, planning and self-advocacy skills.
- **College & Career Counseling** – Engagement participants discussed the current college counseling efforts and strategies for improvement. Many respondents indicated a desire for more counselors, noting the difficulty of students being able to meet with their designated counselor. There were also several discussions across audiences that indicated a desire to add in more career exploration and career counseling, highlighting options outside of going to a four-year college.
- **Growth Mindset** – Whether talking about individual student growth, expansion of instructional delivery, or enhancement of family engagement, all engagement participants stressed the need to continue urging and supporting students to achieve their best.



It should also be noted that in every group, participants held conversations about the changing demographics of the district, with special attention paid to newcomer families. While some communities across the country are experiencing strong opposition to diversity, equity and inclusion efforts, San Juan Unified remains committed to its **8-point Commitment to Educational Justice**, something that does not go unnoticed to students, parents, staff and community members. The key is to ensure that the district can provide concrete actions of this commitment so that it moves beyond words on paper into standard practice across the system.

In addition, all audiences identified the impact of the diversity of the district, often citing it as an asset for learners. But the growing diversity is also cause for concern in San Juan Unified, with many audiences noting concern about how well the district can address the unique needs of students and families.

Overall, the community's feedback emphasizes the importance of a comprehensive, inclusive and supportive educational environment that addresses academic, social and emotional needs for the success of all students in the San Juan Unified School District. Each of the engagements demonstrate a **strong commitment to learning** throughout San Juan Unified, with a genuine **shared passion for the district and the students and families it serves**.

As the district continues this strategic planning process, it will be imperative that discussions focus on planning for the future and determining the direction and mission of the district in the years to come. Fortunately, all engagement participants highlighted the district's history of **putting students first and at the center of all decisions**. Having this as a foundational approach will serve the district well as it plans for the next five years.

- In terms of **student success**, the community places a strong emphasis on essential skills for high school and post-high school achievements.
 - Key skills include effective time management, organizational abilities, communication skills, a proactive mindset, discipline, and perseverance. This holistic approach aims to establish a foundation for academic achievement, personal development, and positive social experiences.
 - The involvement of teachers and staff is deemed crucial in fostering a hopeful and prepared outlook among students.
 - Addressing students' diverse needs, including physical and mental health issues, and offering support during absences contribute to a caring and supportive environment.
 - Furthermore, there is a call for enhanced guidance in life skills, such as practical subjects like cooking and financial literacy.
 - The community advocates for an inclusive and safe school environment that promotes real-world skills through targeted classes and individualized mentorship, contributing to an optimistic atmosphere.



- In addressing the overall **culture and climate**, the community identifies measures to improve inclusivity, eliminate discrimination, and create a positive environment. Strategies include addressing inappropriate behavior and promoting diversity.
 - Collaborative efforts, effective communication, and a proactive approach are highlighted as essential components for fostering a positive and inclusive school culture.
 - The parent and family data accentuate the diverse perspectives within the community.
 - Parents emphasize the importance of preparing students with essential life skills and fostering hope by providing real-world connections to learning.
 - Academic concerns include the need for more staff, better pay, and smaller group sizes to meet diverse student needs.
 - Additionally, there are calls for improved social-emotional support during transitions and increased communication between teachers and parents. Parents of Special Education students stress the unique challenges their children face, emphasizing the importance of real-world connections and experiential learning.

Key Themes by Audience

STUDENTS

San Juan Unified students had much to share when asked about being prepared for high school and beyond.

Success in High School

To be successful in high school, San Juan Unified students identified a combination of essential skills. Collectively, these skills create a foundation for success in high school, encompassing academic achievement, personal development, and a positive social experience.

Categorically, the following are the prioritized skills students feel they need to excel academically and socially in high school:

- **Time Management and Good Study Habits** – Strong study habits, including effective time management and the ability to focus, are crucial for preparing for exams and maintaining good grades.
- **Effective Communication** – Good communication skills, both with teachers and peers, contribute to a positive learning environment.
- **Organization and planning** – Organizational skills play a significant role in ensuring that assignments are completed on time and tasks are prioritized.
- **Growth Mindset** – Having a proactive and disciplined mindset, along with perseverance, focus and concentration, is vital for overcoming challenges and staying



on track. Students also cited attributes such as self-discipline, motivation, responsibility and accountability as critical to success in high school.

- **Problem-solving** – Being able to approach challenges with a willingness and ability to work through struggles and solve problems, both individually and collaboratively with others, is needed in high school and beyond.

Success after High School

As for what they need to be prepared for after high school, students identified needing a combination of academic and life skills to be successful. The following represent the skills they considered important for success in various post-high school endeavors, including college, careers and independent living.

- **Time Management** – The ability to manage one's time effectively and balance various responsibilities.
- **Financial Literacy** – Understanding financial concepts, including taxes, budgeting, and managing money.
- **Communication Skills** – Being able to communicate effectively with others, both in writing and verbally.
- **Critical Thinking and Problem-Solving** – Developing the ability to think critically and solve complex problems.
- **Independence** – Being self-reliant and capable of taking care of oneself.
- **Study Skills** – Learning how to study effectively to succeed in college or career-related pursuits.
- **Social Skills** – Building positive relationships and effectively interacting with others.
- **Planning for the Future** – Setting goals and making plans for further education or career development.
- **Responsibility** – Being accountable for one's actions and fulfilling obligations.
- **Adaptability** – The ability to adapt to new situations and learn new skills as needed.

Role of Teachers and Staff

Teachers and staff can play a crucial role in making students feel hopeful and prepared for the future by addressing various needs and concerns expressed by students. Overall, a combination of understanding, practical education, and mentorship can contribute to students feeling more hopeful and prepared for their future endeavors. The following are suggestions for how teachers and staff can support and help students as they prepare for their future.

- Teach real-world skills such as financial literacy, taxes, and life skills
- Provide career guidance and help students choose suitable career paths
- Be understanding, patient, and respectful towards students
- Offer mentorship and support for academic and personal growth
- Create a positive and inclusive learning environment
- Encourage and motivate students to pursue their goals and aspirations
- Offer guidance on college preparation and scholarship opportunities
- Explain what life will be like after high school and beyond



- Teach time management and study skills
- Provide opportunities for students to explore their interests and passions

In addition, teachers, staff and administrators can improve the culture and climate for all students by implementing a variety of measures. These prioritizations emphasize the immediate need for addressing bullying and promoting inclusivity and diversity, as well as providing mental health support. Students also noted they would like to increase the understanding of teachers and staff about the diversity of needs and learning styles in the district so that they are better able to support the individual needs San Juan Unified students. Additionally, better communication and safety concerns should be prioritized, as well as emotional support, respect, mentorship and motivation.

- Addressing Bullying and Inappropriate Behavior
- Inclusivity and Diversity
- Support for Mental Health
- Better Communication
- Teacher and Staff Attitudes
- Racial and Cultural Sensitivity
- Homework and Academic Support
- Creating Clubs and Activities
- Motivation and Encouragement
- Mentorship and Support

Based on the insights shared, students in San Juan Unified value a positive and supportive school culture. They emphasize the importance of teachers, staff, and administrators being understanding, patient and respectful toward students. Students appreciate the opportunity to work in groups and have a say in certain aspects of their learning environment. Additionally, they express concerns about strict rules, excessive homework, and the impact of such rules on their well-being. The students also highlight the significance of teachers being aware of their diverse backgrounds and providing a welcoming and inclusive environment. Overall, the feedback emphasizes the importance of fostering a positive and supportive school climate that considers the individual needs of each student.

Summary

As such, it is suggested that the district consider several key factors as it plans for San Juan Unified students over the next five to seven years.

- These include a focus on combining academic and emotional competencies, and soft skills for future employment.
- Addressing the issue of bullying is crucial, with an emphasis on proper consequences for consistent problems.
- The mental health of students should be a priority, and efforts should be made to check in on students regularly.



- Recognition and support for teachers, along with considerations for curriculum changes, such as adding classes on life skills and financial education, are also frequently mentioned.
- Additionally, students express the importance of a positive and enjoyable learning environment, the need for more AP classes, and improvements to facilities and resources.

It is clear that student well-being, effective teaching methods, and practical life preparation are key concerns that should be taken into account for future planning.

PARENTS & FAMILIES

The parent and family data for San Juan Unified reflect diverse perspectives on the themes of preparation, hope, academics, advice, and climate and culture. While many parents feel their students are academically prepared, concerns arise about social preparedness, especially during school transitions.

- In terms of preparation, parents from different groups emphasize the importance of essential skills such as discipline, perseverance, and financial sense for students to be successful after high school.
- There is a call for strategic thinking, mentorship opportunities, and exposure to various career paths. While some parents feel their students are well-prepared, others express concerns and suggest that the district should focus on developing strategic thinking and offering mentorship opportunities.
- Hope is seen as crucial in light of recent global challenges. Parents suggest that the district can foster hope by providing real-world connections to learning, exposing students to diverse experiences, and offering mentorship opportunities.
- Alumni engagement, strengthening job skills, and clear visions for multiple possibilities are also mentioned.

Needed Skills for Life Success

As for what students need to be prepared for after high school, parents and families identified several themes. The following represent the skills they considered most important for success in whatever path students choose after graduation.

- **Financial Literacy and Time Management** – The need for students to have clear skills in financial literacy and time management, including budgeting and organizational skills.
- **Career Preparation and Life Skills** – Preparing students for various career paths and teaching practical life skills, recognizing that not everyone will attend college.
- **Critical Thinking and Decision-Making** – The ability to read, analyze, and critically evaluate information to make informed decisions.



- **Communication Skills** – Effective communication, including both in-person and non-verbal communication.
- **Emotional Intelligence and Self-Management** – Teaching students how to manage emotions, adapt to challenges, and be aware of factors beyond their immediate environment.
- **Goal Setting and Self-Advocacy** – Encouraging goal setting, planning, and self-advocacy skills.
- **Interpersonal Skills and Positive Relationships** – Developing positive relationships and understanding what makes good friendships.
- **Adaptability and Problem Solving** – The ability to respond and adapt to future challenges and engage in problem-solving.
- **College and Career Readiness** – Preparing students for college and careers, including collaboration, independence, and real-life skills.

Suggested Improvements

As for suggestions to improve San Juan Unified schools, the following themes emerged from the parent and family engagements:

- **Equity and Access to Resources** – Ensuring equity and access to resources for all students, particularly those facing challenges such as diverse backgrounds, difficult family situations, or economic barriers.
- **Exposure and Exploration of Possibilities** – Exposing students to various paths, options, and careers, allowing them to explore and discover what's possible for their future.
- **Early Implementation of AVID Skills** – Implementing AVID (Advancement Via Individual Determination) skills for all students, such as note-taking, studying, and test-taking, at an earlier stage in students' education, possibly starting as early as kindergarten.
- **Community Partnerships** – Expanding community partnerships and involving external groups that can contribute to academic support is a top priority.
- **Flexibility and Adaptation** – The need for flexibility and adaptation in response to the rapidly evolving world, with an emphasis on embracing change and not blaming others.
- **Empowering Students for Change** – Empowering students to contribute to change and positively impact the world is seen as a core aspect of the mission statement.
- **Diversity and Collaboration** – A strong belief in and commitment to diversity, equity, and inclusion, with an emphasis on celebrating diversity and different cultures.
- **Structural and Systemic Changes for Equity** – Ensuring that the district's efforts result in true structural and systemic changes towards educational justice and equity.
- **Support for Vulnerable Populations** – Better serving populations with high absence rates and low graduation rates by prioritizing support and strategies to address their needs.
- **Teacher Recruitment and Support** – Focusing on recruiting teachers of diverse backgrounds and providing them with opportunities, training, and mentoring to be successful.



- **Elevating Student Voice** – Continuing to listen to students and incorporating their voices into decision-making processes.

In planning for the future, parents suggest addressing violence at school (as they hear reported from their students), strengthening extracurricular activities, considering the impact of AI on education, providing transportation, and offering classes on practical life skills. Additionally, there are calls for more support for special education parents, bilingual personnel, and opportunities for parent connections.

Special Populations

Special Education Families

Parents from Special Education (SpEd) families highlight unique challenges, emphasizing the need for more support and understanding of the individual learning needs of SpEd students. They stress the importance of real-world connections, experiential learning, and a focus on positive values.

In terms of preparation, there is a concern that students with special needs face more barriers and limited options compared to regular education students. Parents express a need for a clearer understanding of growth mindset and resilience, emphasizing the importance of teaching students how to work through struggles.

The theme of hope centers on providing students with real-world connections to learning, guest speakers, and field trips. Academically, there is a call for the district to better meet the needs of special education students, embracing experiential learning, and addressing concerns about program introductions and removals. Concerns about the district's commitment to diversity, equity, and inclusion highlight the need for more representation of disabled students and a focus on educational justice.

Looking ahead, the district is urged to focus on universal design for learning, engage in honest conversations with parents, and provide district-wide leadership for systemic issues. Parents of SpEd students stress the importance of keeping them informed about initiatives and involving them as partners in the educational process.

Newcomer Families

The themes presented in the newcomer parent data highlight the importance of strategic planning for the future, particularly in preparing students for success after high school. The essential skills and attributes emphasized include life skills such as financial literacy, basic car maintenance, and understanding different cultures. Newcomer parents also express a need for clearer communication about learning outcomes and expectations, especially in magnet and immersion programs.

Emotional support during transitions is identified as crucial, along with the suggestion of more field trips and clubs for newcomers to help them feel they belong. The themes also touch on



promoting hope and kindness, addressing academic needs through personalized instruction and tutoring support, and fostering a diverse and inclusive climate.

The district's commitment to diversity, equity, and inclusion is recognized positively with newcomer families. Overall, this parent data reflect a desire for a well-rounded, inclusive and supportive educational environment.

Early Childhood Education Families

Early Childhood Education (ECE) parent responses highlight several key themes. In terms of preparation, parents emphasize the importance of practical skills, financial knowledge, and exposure to different career paths for students to be successful after high school.

The discussion on hope underscores the need for students to feel secure and engaged in activities, with a call for more diverse and accessible extracurricular options. Regarding academics, parents stress the importance of multilingual information access and urge the district to support parents in understanding the various programs and services offered by the district.

The climate and culture in San Juan Unified is generally positive, with a sense of acceptance and diversity. The commitment to diversity, equity and inclusion is acknowledged positively, but there are suggestions for more information dissemination and continued support for multilingual families.

Looking to the future, ECE parents advocate for assessing preschool enrollment requirements, increasing preschool options, addressing transportation challenges, and focusing on equitable distribution of resources. The feedback also stresses the importance of celebrating diverse cultures and providing clarity on program eligibility.

FACULTY & STAFF

Many teachers and staff members in San Juan Unified identified the evolving and diverse needs they are seeing in their students.

Needed Skills for Life Success

As for what students need to be prepared for after high school, faculty and staff identified themes similar to those identified by parents and families. The following represent the skills they considered most important for post-secondary success.

- **Growth Mindset** – Believing that abilities and intelligence can be developed through effort, learning and resilience. Students with a growth mindset are more likely to embrace challenges, persevere through setbacks, and view failures as opportunities for growth.



- **Interpersonal Skills** – The ability to effectively interact, communicate and collaborate with others, encompassing qualities such as active listening, empathy, teamwork, conflict resolution and building positive relationships.
- **Time Management** – Time management is the skill of efficiently organizing and prioritizing tasks to make the most of one's available time. It involves setting goals, creating schedules and avoiding procrastination to ensure productivity and meet deadlines.
- **Financial Literacy** – Knowledge and understanding of financial concepts and practices, such as budgeting, saving, investing, managing debt and making informed financial decisions to achieve financial well-being.
- **Empathy** – Ability to understand and share the feelings, perspectives and experiences of others, which can lead to more compassionate and supportive relationships.
- **Communication Skills** – Being able to convey ideas, thoughts and information effectively to others. This includes verbal communication, non-verbal cues, active listening and adapting communication styles to various situations and audiences.
- **Problem Solving** – Capacity to identify, analyze and find solutions to challenges and complex issues; requiring critical thinking, creativity and a systematic approach to overcoming obstacles.
- **Self-Regulation** – Ability to manage one's emotions, behaviors and impulses in a way that supports personal goals and social harmony.
- **Cultural Awareness** – Recognition and understanding of different cultures, beliefs, customs and perspectives, involving respecting and valuing diversity, promoting inclusivity, and being culturally sensitive in interactions with others.
- **Critical Thinking** – Capacity to analyze, evaluate and synthesize information and ideas systematically.
- **Basic Life Skills** – A range of essential skills fundamental for independence and self-sufficiency, and necessary for daily living, including personal hygiene, meal preparation, household management, and basic financial responsibilities.

These skills collectively contribute to a student's personal and academic success, as well as their ability to navigate various aspects of life effectively. Developing and honing these skills can empower students to thrive in both educational and real-world settings.

Suggested Improvements

As for suggestions to improve San Juan Unified schools, the following themes emerged from the faculty and staff discussions:

- **Equity and Access** – Staff members express concerns about the varying levels of preparedness among students, often linked to disparities in access to opportunities, resources and support at home. There is a call for equity, setting high expectations for all students, eliminating stigmas, and providing comprehensive support to help students make informed decisions for their future.



- **Academic Success** – Staff members emphasize the need for a forward-thinking approach aligned with the district's mission of empowering students to contribute and thrive in a rapidly evolving world. Recommendations include expanding community partnerships, removing barriers to access learning opportunities, implementing early intervention, and fostering high expectations for all students. They also suggest improving accessibility to hybrid/independent study programs, addressing teacher autonomy challenges, and adopting a more systemic and consistent approach to family engagement.
- **Fostering Hope and Excitement** – Suggestions include celebrating all students consistently, prioritizing staff well-being as an example for students, building on students' identities, and incorporating joy and genius into education. There is an emphasis on viewing every child as an intellectual worthy of rich academic experiences, promoting community, teams, connection and play, and ensuring meaningful and relevant learning opportunities.
- **Climate & Culture** – Staff identify the need for systematic professional learning time within the professional day, as well as ongoing reflection on diversity, equity and inclusion efforts. They acknowledge the critical work involved and express their commitment to diversity, equity and inclusion while recognizing the challenges and the importance of supporting this work even in the face of opposition.

Overall, faculty and staff suggest the district focus on making true structural and systemic changes toward educational justice and equity. Specifically, they call for the district to adequately address the needs of populations with high absence and low graduation rates, conduct surveys and engagements to inform systemic changes, examine suspension rates, embrace diversity, consider communities as expert partners, and emphasize accountability for systemic change.

COMMUNITY MEMBERS

The community partner themes revolve around several key areas.

Needed Skills for Life Success

As for what students need to be prepared for after high school, community members identified themes similar to those identified by other audiences. The following represent the skills they considered most important for post-secondary success.

- **Literacy Skills** – Ability to read, write, comprehend and effectively communicate using written language, including not only basic reading and writing but also critical reading, information literacy, and digital literacy in today's technology-driven world.
- **Interpersonal Skills** – People skills or social skills, involving the ability to interact, communicate and build positive relationships with others, encompassing active listening, empathy, effective communication, conflict resolution, teamwork and collaboration.



- **Vocational Partnerships** – Collaborations between the district and businesses or organizations focused on providing students with opportunities for real-world experiences, internships, apprenticeships and career-related education, enhancing their vocational or career development.
- **Life Skills** – A broad range of essential abilities and competencies that individuals need to navigate daily life effectively, including time management, problem-solving, financial literacy, decision-making, goal setting, organization, basic cooking and household management, and other practical skills that contribute to personal independence and well-being.
- **Community Involvement and Partnerships** – Active participation, collaboration and engagement with the local community and external organizations, supporting various initiatives such as community service projects, volunteer opportunities, civic engagement, and mutual support for educational and community goals.

Suggested Improvements

As for suggestions to improve San Juan Unified schools, community partners centered on the the following themes:

- **Equity and Inclusion Implementation** – Community partners noted concerns about the district's actual implementation of diversity, equity and inclusion efforts, with a focus on wanting to see tangible actions and evidence of progress.
- **Transparency in Budget and Resources** – They also noted the need for greater transparency, especially in budget allocation and resource distribution, to ensure fairness and equity across schools.
- **Early Intervention and Learning Support** – Community members advocate more early intervention and support for students, including early testing for learning disabilities and introducing reading at an early age.
- **Community Involvement and Partnerships** – Community members emphasize the importance of community involvement and partnerships, with a focus on building connections and collaborations.
- **Empowerment and Transparency for Teachers** – They also encourage teachers to ask for the resources they need, fostering a culture of transparency and advocating for what they need. Similarly, they encourage teachers to seek and provide mentorship and support among colleagues and students.
- **Community Engagement and Marginalized Voices** – Members want to ensure that district leaders are hearing from all members of the district community, including marginalized populations who may not feel comfortable attending meetings.
- **Adaptation and Flexibility** – Community members encourage the district to be flexible and adaptable in the face of challenges and changes in the world, and the need to adapt resources and strategies accordingly.



Overall, the data highlight the importance of collaboration, transparency and targeted support for diverse student needs as the district plans for the future of San Juan Unified over the next five years.

SCHOOL BOARD

Data from School Board interviews identify a comprehensive approach to preparing students for life after graduation, encompassing academic, practical, social and personal development aspects.

Needed Skills for Life Success

As for what students need to be prepared for after high school, school board members identified themes similar to those identified by other audiences. The following represent the skills they considered most important for post-secondary success.

- **Basic Academic Skills** – This includes proficiency in reading, writing, mathematics and language. These foundational skills are critical for success in further education and the workplace.
- **Critical Thinking** – Developing the ability to think critically, analyze information and solve complex problems is essential for making informed decisions in various life situations.
- **Life Skills** – General life skills, such as personal care, time management, organizational skills, and coping mechanisms, contribute to students' overall independence and well-being.
- **Career and Technical Education (CTE) Skills** – Equipping students with practical skills and knowledge that are directly applicable to the workforce, ensure they are prepared for a variety of job opportunities.
- **Social and Interpersonal Skills** – Board members note that teaching students how to interact positively with people of diverse backgrounds, practicing empathy, communication, teamwork and leadership skills, is essential to success in life.
- **Technology Skills** – Beyond basic keyboarding, students need to be proficient in using technology for research, information gathering and as a tool for their education and future careers.
- **Financial Literacy** – Understanding personal finance, including budgeting, saving, investing, and managing money, is crucial for financial stability and independence.
- **Career Planning and Strategic Thinking** – Board members encourage helping students create a strategic plan for their education and career, ensuring they have clear goals and a sense of direction beyond high school.
- **Access to Resources and Information** – Teaching students how to access necessary resources for employment, education and other needs, including knowing where to seek help or guidance, will serve them well in adulthood.



- **Empathy and Social Awareness** – Fostering qualities like empathy, kindness, and the ability to initiate positive interactions with others contributes to personal and professional success.

Suggested Improvements

As for suggestions to improve San Juan Unified schools, board members centered on the the following themes:

- **Holistic Support** – Board members encourage the district to provide holistic support to students, addressing their social, physical and mental needs, including ensuring students have access to meals and support for their well-being.
- **Clear Goals and Structure** – Board members would like to establish clear educational goals for all students beyond graduation.
- **Communication and Education on Consequences** – Improving communication with students about the consequences of their actions and decisions, with a focus on education rather than discipline will serve students well in adulthood.
- **Access to Advanced Programs** – Several board members would like to see the district offer a variety of advanced programs, including Career Technical Education (CTE) and Advanced Placement (AP) courses, to cater to diverse student interests and needs.
- **Social and Emotional Supports** – They would also like to increase social and emotional support for students to help them succeed academically
- **Partnerships and Resources** – Board members encourage the district to collaborate more with external partners and organizations to provide additional resources and support to students.
- **Access to Information and Resources** – Ensuring students and parents have access to essential information, resources, and wraparound services to support their educational journey is critical to student success.
- **Supporting Families and Caregivers** – Providing support to families and caregivers to meet their needs outside of school, as it directly impacts students' ability to learn.

These themes emphasize the importance of a comprehensive approach to education that includes academic, social, emotional and practical support to prepare students for their next step after graduation.

04 | Next Steps •

Plan Development

On January 29 and 30, a Core Planning Team (CPT) composed of students, staff, parents/families, and community members will convene for two days to review this report and other district data as part of a facilitated workshop. The purpose of the workshop will be to develop draft strategic focus areas that will be part of a larger district strategic plan. Following



this two-day workshop, an internal Design Team (DT) will meet on January 31 and February 1 to review the work of the CPT, and refine the plan as needed so that it aligns with other district initiatives as well as state and federal standards. The Design Team will also explore if updates are needed to the district's mission, vision and values statements.

CESO Communications will present the engagement data report to the School Board on February 13, 2024, along with a recap of the work of the Core Planning Team and Design Team. The purpose of this presentation is to review the key themes and highlights of what was heard during the fall engagements and answer questions from the School Board. No action by the School Board is necessary at this time.

Community Engagement (Round 2)

The draft focus areas will be shared with the community in the spring to gather feedback and identify gaps. The teams will then reconvene following this community engagement period to review the insights collected and make recommendations for changes. The recommendations will be reviewed by the district administration for refinement, from which a more comprehensive strategic roadmap will be developed. Later this spring, members of the CPT and DT will present the new strategic plan to the School Board for review and approval.

San Juan Unified School District

Strategic Planning Engagement Report (Round 2)

April 15 2024

prepared by CESO Communications

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Executive Summary •

Background

In the fall of 2023, San Juan Unified School District (San Juan Unified) launched a strategic planning initiative by inviting all members of the district community to provide insights for the future of the district. A variety of engagements were conducted, including focus groups, interviews, open sessions, community workshops and an online ThoughtExchange discussion, all centered around what the district should focus on in the next three to five years.

In late January to early February, a Core Planning Team, composed of over 65 students, staff, parents/families and community members came together to review [engagement insights](#) and a variety of other district data to begin to develop a draft strategic direction for San Juan Unified. The team met over two days, culminating in the development of draft directions and priority outcomes that serve as a framework for a new strategic plan.

This framework was then reviewed by an internal team of district leaders, called the Design Team, who were charged with refining the language of the plan to ensure that outcomes are kept at a high level rather than being too specific or predetermining specific actions and solutions.

In an effort to ensure the new strategic plan is truly developed in partnership with the entire San Juan Unified community, students, families, staff and residents were asked to share their feedback on the [draft strategic framework](#). Insights were collected via focus groups, online surveys, student pop-up sessions, community gallery walks and another ThoughtExchange. The findings from these engagements informed the work of the Core Planning Team and Design Team as they reconvened on April 17 and April 19, respectively, to revise the strategic framework.

Strategic Direction I

Overall, feedback on Strategic Direction I was largely positive, with respondents appreciating the clarity and understandability of the language and purpose. The direction was celebrated for its alignment with the district's objectives and its emphasis on inclusion and addressing educational gaps. The success of adult education classes and programs like the Certified Nursing Assistant (CNA) program were also highlighted as strengths.

However, challenges were identified, including limited progress in English Language (EL) support, weaknesses in the high school English Language Development (ELD) curriculum, and uncertainties surrounding the implementation of culturally responsive classrooms. Concerns were raised about potential conflicts between the district's vision of inclusion and Special Education (SpEd) provisions, as well as a lack of clarity and disclosure to SpEd parents regarding available options.



Despite these challenges, the majority of respondents expressed favorable views of Strategic Direction I. Specifically, 92% agreed that it helps sustain high academic achievement and 93% said it addresses current gaps in the San Juan Unified district. In addition, over 89% found the language and purpose of the direction clear and understandable, while a similar percentage understood how the priority outcomes would help meet identified goals. Suggestions for improvement included clarifying the purpose, strengthening community engagement, enhancing support for SpEd, prioritizing career technical pathways, and reordering and clarifying priorities within the strategic direction.

Additionally, there were calls to prioritize social and emotional support for students, expand capacity and bilingual staff, address behavioral issues, improve communication and clarity, and offer more professional development opportunities focused on the whole child approach and social-emotional learning (SEL).

In summary, while respondents largely appreciated the clarity and purpose of Strategic Direction I, there are areas for improvement to ensure that it effectively addresses the needs of all students and families within the district, particularly those in SpEd and English Language support programs.

Strategic Direction II

Feedback on Strategic Direction II reflected mixed opinions among respondents. While many participants appreciated the strong and well-written language of the direction, some challenges and areas for improvement were identified.

Strengths of Strategic Direction II included positive reception and treatment of refugees and foster youth, fair chances and supports provided to students, and recognition of the need for increased knowledge among counselors. However, challenges were noted, such as the need for improved dissemination of information about available supports, concerns about the specificity of the commitment to race over other areas like SpEd, and uncertainty about the application of the direction to SpEd.

In the survey results, it was evident that there were varied opinions regarding the effectiveness of the direction in sustaining high academic achievement and addressing current gaps in San Juan Unified. Only 41% of respondents expressed agreement that the goals would sustain high academic achievement, and 35% agreed that it would address gaps, with the majority of respondents seeming less convinced. In regard to understanding the language and purpose of the direction, responses were again mixed. While some found it clear and understandable, nearly 79% felt there was room for improvement in clarity. Similarly, understanding how the priority outcomes would contribute to meeting identified goals also saw a range of perspectives among the respondents, with less than 30% indicating agreement with the statement.

Suggestions for improvement included clarifying language and purpose, addressing economic mobility and comprehensive support, prioritizing mental health and well-being, explicitly



including SpEd, integrating with Strategic Direction I, and strengthening professional development with accountability.

Students who provided feedback about the language and purpose of Strategic Direction II identified it to be clear and understandable. Their insights were generally favorable, highlighting the purpose of creating a supportive learning environment, providing academic support and resources, preparing for the future, promoting inclusive and equitable education, and enhancing engagement and communication between staff and students.

In summary, while there were strengths to Strategic Direction II, such as its treatment of refugee and foster youth, there are areas for improvement to ensure it effectively addresses the needs of all students, including those in SpEd, and promotes equity and inclusivity throughout the district.

Strategic Direction III

Participants expressed favorable opinions regarding the language and content of Strategic Direction III, highlighting several strengths. These included appreciation for collaborative efforts and support provided to staff, as well as recognition of the importance of supporting staff to meet the diverse needs of learners. However, challenges were also identified, such as uncertainty surrounding the term "destination district" and concerns about providing adequate support and compensation to staff amidst negotiations and union interactions.

Despite these challenges, the majority of participants viewed Strategic Direction III favorably. Specifically, approximately 90% agreed that it helps sustain high academic achievement and addresses current gaps in the San Juan Unified district. Moreover, over 92% found the language and purpose of the direction clear and understandable, while a similar percentage understood how the priority outcomes would help meet identified goals.

Suggestions for improvement focused on enhancing clarity and academic focus within the strategic direction, highlighting the importance of administrative support for teachers, motivating participation in professional development, improving transparency and communication, and emphasizing employee safety and inclusivity. Additionally, students emphasized the importance of creating a supportive, respectful, and inclusive work environment for school employees, advocating for employee support and appreciation, a positive work environment, effective communication and collaboration, equitable treatment and support systems, and student involvement in supporting staff.

In conclusion, Strategic Direction III aims to create a supportive and inclusive work environment that empowers school employees to effectively meet the diverse needs of learners. By addressing identified challenges and implementing suggested improvements, the district can work towards fostering a positive and respectful workplace culture that benefits both staff and students alike.



Strategic Direction IV

Participants generally expressed favorable opinions regarding the language and content of Strategic Direction IV, highlighting several strengths. These included appreciation for language translations for parents, respectful treatment of cultural differences such as the Russian/Ukrainian separation, and efforts to include Afghan women in committees, demonstrating diversity and inclusivity. Moreover, the direction was praised for its focus on supporting families in navigating the educational system, implementing restorative practices for behavior change, and emphasizing the importance of field trips and experiences for all students.

However, challenges were also identified, including discrepancies in the welcome and support received at secondary sites compared to other levels, the need for proactive early interventions and monitoring of meaningful engagement, and the lack of availability of before/after school care, particularly for families without transportation or schools without Transitional Kindergarten (TK) classes.

While favorability toward Strategic Direction IV was strong (88% agreement) in terms of its potential impact on academic achievement, it received less favorable ratings (less than 30% agreement) on other factors. Notably, suggestions for improvement focused on enhancing clarity and academic focus, expanding listening sessions and partnerships, refining direction and purpose statements, emphasizing student empowerment and inclusive communication, providing parent learning opportunities, and improving communication and engagement.

Respondents emphasized the importance of creating a supportive, inclusive, and empowering school environment where all members of the community feel valued and supported. Key themes identified included family and community engagement, a supportive environment, equitable access to resources, communication and transparency, inclusivity and respect, and empowerment through education.

In conclusion, Strategic Direction IV aims to foster a supportive and inclusive environment that empowers students, families, and staff to achieve academic and personal success. By addressing the identified challenges and implementing suggested improvements, the district can work towards creating a more equitable and enriching educational experience for all stakeholders.

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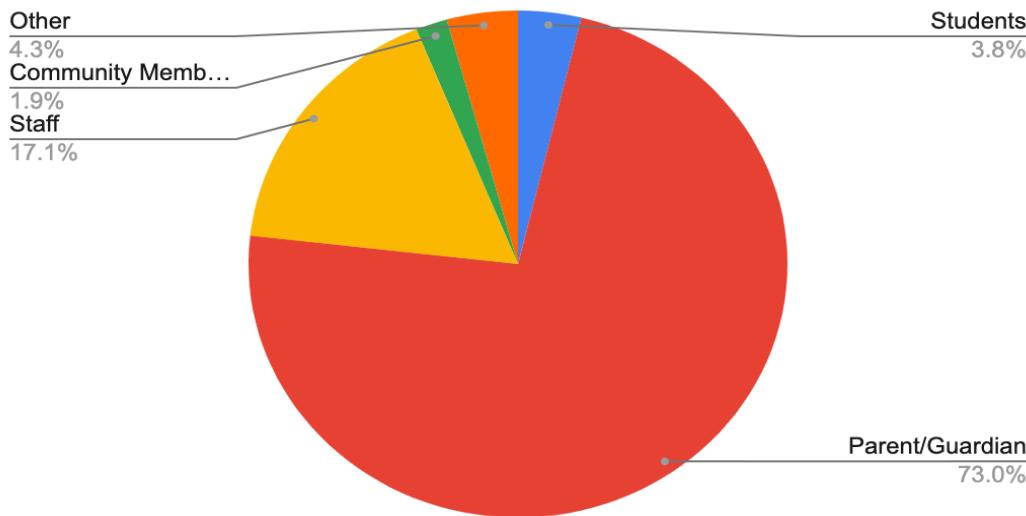
Engagement Data by Activity •

ThoughtExchange Insights

All members of the San Juan Unified School District community were invited to participate in an **online conversation** via the district's ThoughtExchange platform. The conversation provided an opportunity for participants to share what they liked about the draft strategic framework, what concerns they had, and any suggestions for enhancement or improvement to the framework. The exchange was open from March 4-18. The majority (98%) of participants in the exchange did so in English, with 2% participating in Spanish.

 Participants	 Thoughts	 Ratings
217	185	5,655
Last activity: 7 days ago	0.9 thoughts / participant	26.1 ratings / participant

District Role



The participants' responses reveal a mix of concerns and suggestions. The most prominent topics revolve around the quality of education, safety in schools, social-emotional learning, inclusivity and resource allocation.

1. Enhancing Quality of Education

Participants expressed concerns about the quality and consistency of instruction across different levels and subjects. Some questioned the purpose of honors classes and suggested a need for more rigorous courses. Others highlighted the importance of teaching real-world skills and critical thinking. There were also calls for more support for English language learners and students with special needs.

2. Improving School Safety

Safety emerged as a significant concern, with participants citing issues such as



bullying, fights and drug use on campus. There were calls for stricter discipline, increased school security, and better training for staff to handle and de-escalate conflicts.

3. Integrating Social-Emotional Learning (SEL)

Opinions on SEL were divided. Some participants advocated for schools to play a more active role in teaching SEL, while others argued that this responsibility should fall on families. There were also concerns about teacher burnout and the need for more support for staff dealing with behavioral issues.

4. Promoting Inclusivity and Equity

Participants expressed a desire for more inclusivity and equity in the district. This included calls for more diverse representation among staff, more support for inclusive classrooms, and concerns about equitable grading practices. However, some participants felt that the focus on diversity and equity was detracting from academic achievement.

5. Optimizing Resource Allocation

There were numerous comments about the need for better resource allocation, including more support for intervention teachers, more funding for staff training, and improved school facilities. Participants also highlighted the need for more accessible school transportation and after-school tutoring programs.

Focus Group Insights

The district conducted focus groups with identified parent audiences, including Local Control and Accountability Plan (LCAP) priority group families, Early Childhood Education (ECE) families, SpEd families and Immigrant/Refugee/Newcomer families. Participants were asked to share their thoughts about the four strategic directions, focusing on the language used, strengths and challenges.

STRATEGIC DIRECTION I

Overall, feedback from parents felt the language used was positive, clear and concise.

Strengths

- Recognition of the need for improvement and alignment with the district's objectives
- Success of adult education classes and the effectiveness of the CNA program
- Thoughtful consideration and selection of language for outcomes, aligning well with strategic plan expectations
- Appreciation for the emphasis on inclusion and the need for a common understanding of its implementation



Challenges

- Limited progress in English Language (EL) support and lack of access to technology for homework assignments
- Weaknesses in the high school English Language Development (ELD) curriculum, particularly in modeling and conversational opportunities
- Uncertainty and questions surrounding the implementation of culturally responsive classrooms
- Discrepancies between the district's and SpEd vision of inclusion, potentially causing conflicts
- Concerns about the language's potential impact on SpEd parents' efforts and the perceived exclusion of SpEd in certain initiatives
- Lack of clarity and disclosure to SpEd parents regarding available options, especially in middle and high school
- Difficulty in accessing certain programs, such as Discover Club and ECE, for students with disabilities, and a lack of focus on SpEd in initiatives like the Rapid Learning program

STRATEGIC DIRECTION II

Again participants felt the language was strong and well-written.

Strengths

- Positive reception and treatment of refugee and foster youth, particularly at the Adult school
- Fair chances and supports provided to students, reflecting compassion and collaboration within the educational community
- Recognition of the need for increased knowledge among counselors and the importance of providing support to new refugee parents

Challenges

- Need for improved dissemination of information about available supports, especially for new refugee parents
- Lack of clarity on professional development opportunities and concerns about the specificity of the 8-point commitment to race over other areas like SpEd
- Uncertainty about the application of the strategic direction to SpEd and the need for educational justice for SpEd students
- Challenges in parental understanding of disabilities and the lack of transparency in how the district supports SpEd families



STRATEGIC DIRECTION III

Participants were favorable toward the language of this direction.

Strengths

- Appreciation for the collaborative efforts and thoughtful support provided to staff
- Recognition of the importance of supporting staff to meet the diverse needs of learners

Challenges

- Uncertainty regarding the term "destination district" and its implications for salaries, benefits, etc
- Concerns about providing adequate support and compensation to staff amidst the challenges of negotiations and working with various unions

STRATEGIC DIRECTION IV

Participants were generally favorable toward the language used in this strategic direction.

Strengths

- Appreciation for language translations for parents, particularly at the District English Learner Advisory Committee (DELAC)
- Respectful handling of the Russian/Ukrainian separation and appreciation for cultural sensitivity
- Inclusion of Afghan women in committees, showcasing diversity and inclusivity efforts
- Support provided to families in navigating the educational system and access to resources
- Focus on restorative practices for behavior change and the importance of field trips and experiences for all students

Challenges

- Discrepancies in the welcome and support received at secondary sites compared to other levels
- Need for proactive early interventions and monitoring of meaningful engagement
- Clarification needed on student-led interventions
- Desire for better balancing of celebrations for students at different levels
- Lack of availability of before/after school care, especially for families without access to transportation or schools without TK classes
- Exploration of potential partnerships between schools and daycares to improve preschool education and transitions



District Committee Insights

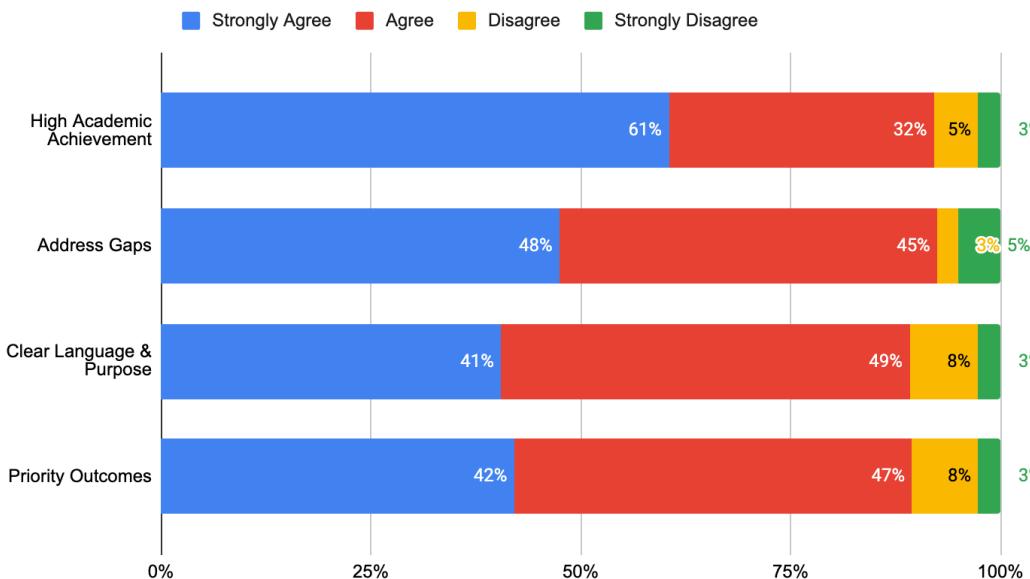
Members of district advisory committees were asked to provide feedback on the strategic directions, the purpose statements and priority outcomes via an online survey.

For each strategic direction, participants were asked to identify their level of agreement – *Strongly Agree, Agree, Disagree, Strongly Disagree* – with the following statements.

- This strategic direction will help the district sustain **high academic achievement** for the next three to five years
- This strategic direction **addresses current gaps** in San Juan Unified
- The language and purpose of this strategic direction are **clear and understandable**
- I understand how the **priority outcomes** will help meet the goal of this strategic direction

STRATEGIC DIRECTION I

DIRECTION I (Advance Student Success)



FAVORABILITY

The majority of respondents were favorable toward Strategic Direction I:

- More than 92% of respondents identify that they strongly agree or agree that the strategic direction helps sustain high academic achievement
- Nearly 93% agree that the strategic direction addresses current gaps in San Juan Unified
- Almost 89% identify the language and purpose of the strategic direction as clear and understandable
- Approximately 89% understand how the priority outcomes will help meet identified goals



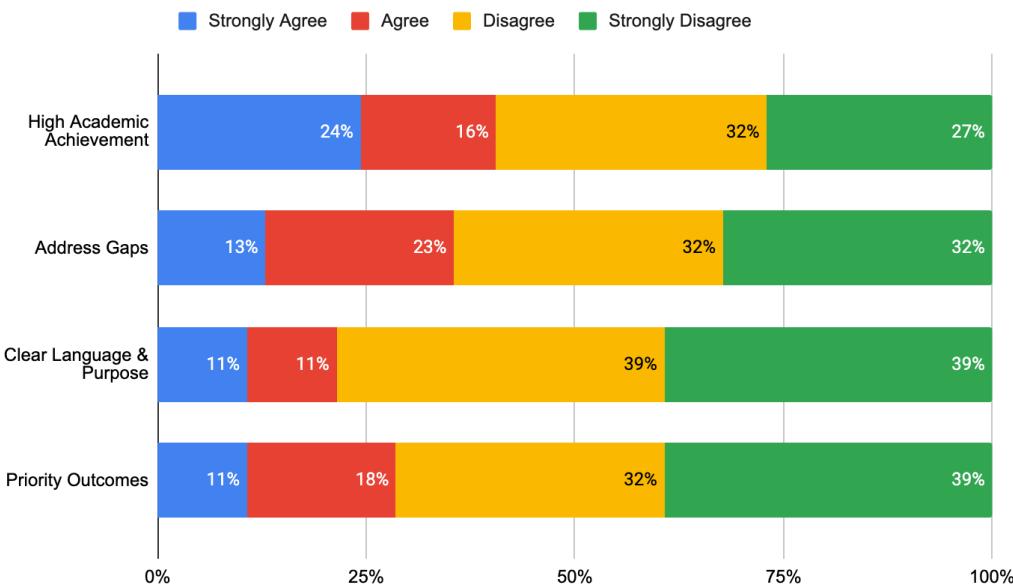
SUGGESTIONS FOR IMPROVEMENT

The following are the key themes of the 29 comments about improvements for Strategic Direction I:

1. **Clarify Language and Purpose** – Ensure clarity in language, especially regarding terms like "equitable," and tie the purpose more explicitly to addressing educational gaps within the district.
2. **Strengthen Community Engagement** – Include community, parent and stakeholder voices more effectively in the strategic direction planning process.
3. **Enhance Support for Special Education** – Ensure that the strategic direction includes specific provisions and training for SpEd students and staff, emphasizing inclusion and tailored support.
4. **Prioritize Career Technical Pathways** – Highlight career technical pathways and non-traditional career options, emphasizing their importance and celebrating their value.
5. **Reorder and Clarify Priorities** – Rearrange the strategic direction sections to prioritize equity, employee support, and family empowerment emphasizing the foundational importance of these elements to advance student success.

STRATEGIC DIRECTION II

DIRECTION II (Prioritize Equitable Practices)



FAVORABILITY

Respondents were more mixed about Strategic Direction II:

- Approximately 41% of respondents identify that they strongly agree or agree that the strategic direction helps sustain high academic achievement
- Less than 35% agree that the strategic direction addresses current gaps in San Juan Unified



- Almost 22% identify the language and purpose of the strategic direction as clear and understandable
- Approximately 29% understand how the priority outcomes will help meet identified goals

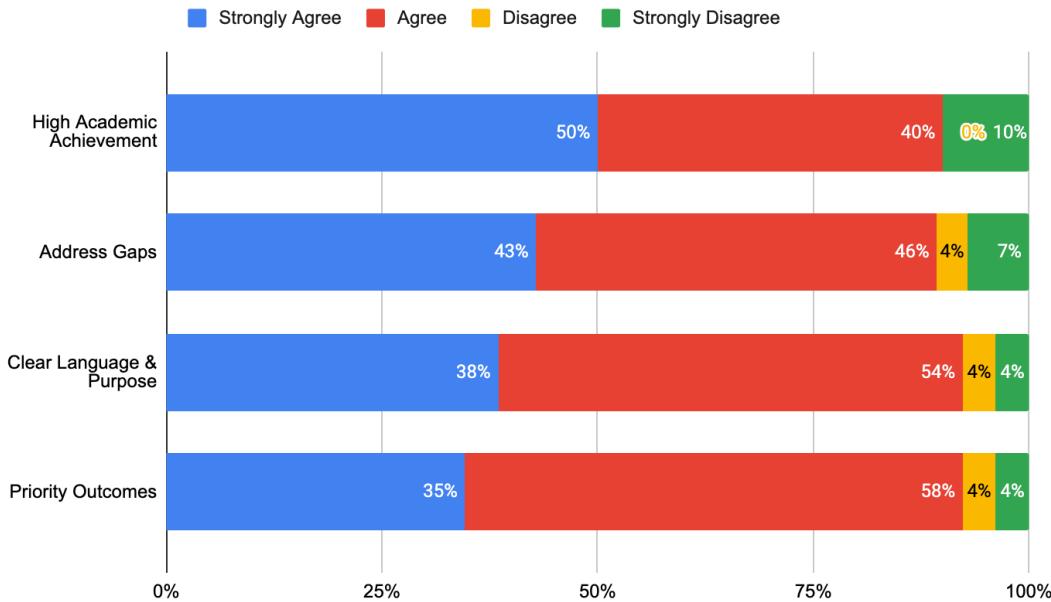
SUGGESTIONS FOR IMPROVEMENT

The following are the key themes of the 13 suggestions for improving Strategic Direction II:

1. **Clarify Language and Purpose** – Use clearer language in the purpose statement, such as "advance" instead of "integrate," to ensure understanding and alignment with the direction's objectives.
2. **Address Economic Mobility and Comprehensive Support** – Enhance efforts to support families with economic mobility, including job training and education opportunities, to address poverty and its effects on student success.
3. **Prioritize Mental Health and Well-Being** – Highlight mental health and emotional well-being as critical components within this direction, especially for adolescents facing increasing challenges.
4. **Inclusion of Special Education** – Address the needs of SpEd students explicitly within the direction, rather than lumping them into the general student population.
5. **Integration with Strategic Direction I** – Emphasize the integral connection between Strategic Direction I (advancing student success) and Direction II (prioritizing equitable practices) to ensure their mutual achievement.
6. **Strengthen Professional Development with Accountability** – Enhance professional development opportunities for all employees, with a focus on making participation mandatory where necessary to drive meaningful change.

STRATEGIC DIRECTION III

DIRECTION III (Enhance Employee Support Systems)





FAVORABILITY

The majority of participants were favorable toward Strategic Direction III

- About 90% of respondents identify that they strongly agree or agree that the strategic direction helps sustain high academic achievement
- Just under 90% agree that the strategic direction addresses current gaps in San Juan Unified
- Over 92% identify the language and purpose of the strategic direction as clear and understandable
- Over 92% understand how the priority outcomes will help meet identified goals

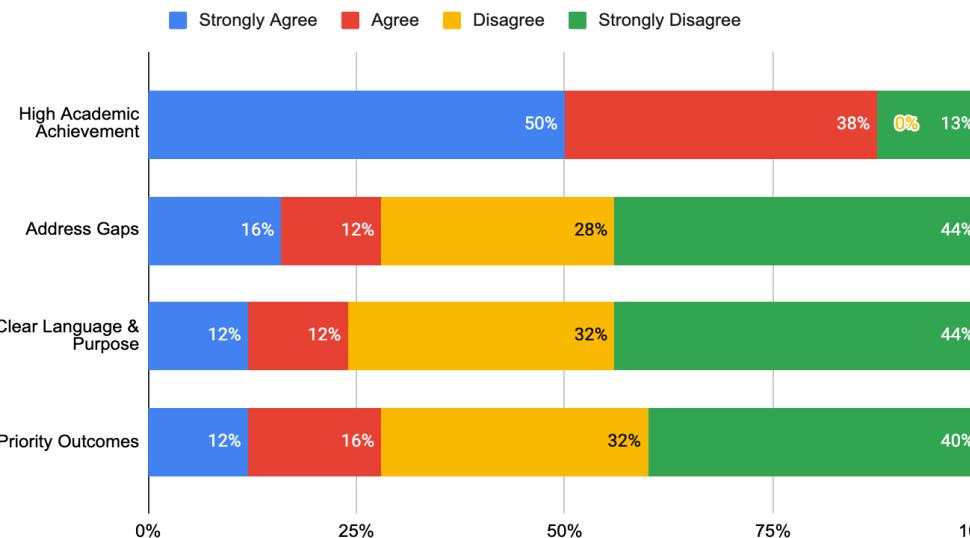
SUGGESTIONS FOR IMPROVEMENT

The following are the key themes of the 17 suggestions for improving Strategic Direction III:

1. **Clarity and Academic Focus** – Increase clarity within the direction, focus more on academic goals rather than emotional ones, and emphasize academic success through data, scores and student achievement.
2. **Administrative Support of Teachers** – Highlight the importance of administrative support for teachers, especially in handling unrealistic demands from parents and maintaining a conducive learning environment.
3. **Motivation and Participation in Professional Development** – Ensure that professional development opportunities are effectively utilized by motivating employees to participate, possibly through restructuring rewards or setting expectations for involvement.
4. **Transparency and Communication** – Enhance transparency and communication within the district through avenues like internal town halls or webinars to provide updates, successes, and opportunities for discussion and feedback.
5. **Emphasize Employee Safety and Inclusivity** – Include language addressing strategies to provide physical and emotional safety for staff, promoting an inclusive work environment, and upholding levels of privilege and confidentiality when hearing employee voices.

STRATEGIC DIRECTION IV

DIRECTION IV (Invest in Efforts to Assist Students and Families to Empower Themselves)





FAVORABILITY

Favorability was strong toward Strategic Direction IV in terms of academic achievement, but less than favorable about other factors.

- Nearly 88% of respondents identify that they strongly agree or agree that the strategic direction helps sustain high academic achievement
- Approximately 28% agree that the strategic direction addresses current gaps in San Juan Unified
- About 24% identify the language and purpose of the strategic direction as clear and understandable
- A little more than 28% understand how the priority outcomes will help meet identified goals

SUGGESTIONS FOR IMPROVEMENT

The following are the key themes of the 8 suggestions for improving Strategic Direction IV:

1. **Clarity and Academic Focus** – Increase clarity and emphasize academic goals throughout the direction, committing to academic excellence and improved outcomes for students.
2. **Expand Listening Sessions and Partnerships** – Improve the LCAP listening sessions by expanding participation to include large employee groups, community colleges, law enforcement, and chamber of commerce groups. Enhance the information provided in these sessions and broaden the vision of partners to include those not traditionally engaged with.
3. **Refine Direction and Purpose Statements** – Clarify the direction and purpose statements, ensuring that goals like empowering students and families are clearly defined and actionable.
4. **Student Empowerment and Inclusive Communication** – Emphasize student-led interventions and empowerment, possibly through initiatives like student-led conferences. Offer inclusive language options for communication to promote greater participation.
5. **Enhance Parent Learning Opportunities** – Provide parent learning opportunities, such as seminars or prerecorded Zoom sessions in native languages, to help immigrant parents understand the US K-12 education system and various career paths available for their children.

Community Gallery Walks

Members of the community were invited to provide feedback about the strategic directions at open house gallery walks.



STRATEGIC DIRECTION I

All of the 17 people who provided feedback on Strategic Direction I felt the language and purpose were clear and understandable.

SUGGESTIONS FOR IMPROVEMENT

- **Social and Emotional Support** – Prioritize the provision of social and emotional support for students, recognizing the importance of addressing their well-being alongside academic growth.
- **Capacity Expansion and Bilingual Staff** – Explore ways to expand school enrollment capacity to accommodate more students and consider hiring additional bilingual staff to better serve diverse student populations.
- **Behavioral Support and Hands-on Learning** – Focus on addressing behavioral issues within schools and provide more hands-on and visual learning opportunities for students to enhance engagement and understanding.
- **Improved Communication and Clarity** – Enhance communication about available programs and ensure consistency in promotion across all schools. Clarify language and provide examples to explain jargon and keywords used in the strategic direction.
- **Professional Development and Whole Child Approach** – Offer more professional development opportunities for staff, particularly on teaching the whole child and implementing social-emotional learning (SEL) practices effectively. Additionally, prioritize frequent check-ins with students to address their personal needs and mental health.

STRATEGIC DIRECTION II

All of the 15 people who provided feedback on Strategic Direction II felt the language and purpose were clear and understandable.

SUGGESTIONS FOR IMPROVEMENT

- **Professional Development and Growth Opportunities** – Prioritize providing professional development opportunities for all staff members to foster their growth and enhance their skills.
- **Equity Department Work** – Expand the work of the equity department to focus on all identity groups and involve staff and families in the design of equity plans. Consider designating staff members at each school site to lead equity efforts while maintaining shared responsibility among all staff.
- **Staff Engagement** – Implement regular engagements to ensure staff feel heard and valued.

STRATEGIC DIRECTION III

All 13 respondents felt the language and purpose of Strategic Direction III were clear and understandable.



SUGGESTIONS FOR IMPROVEMENT

- **Professional Development and Growth** – Prioritize more professional development opportunities for employees to support their growth and skill enhancement.
- **Cultural Awareness and Support** – Focus on increasing cultural awareness among staff to enable them to help them foster inclusivity and understanding.
- **Support Staff Needs** – Address the need for more support for teachers and staff, including additional aides to alleviate workload and provide assistance.
- **Enhance Communication and Collaboration** – Increase communication between departments to ensure effective teamwork and collaboration, facilitating smoother operations and support for staff.
- **Address Burnout and Flexibility** – Develop strategies to address staff burnout, which they indicate is prevalent across all departments, and provide more flexibility for employees who may have constraints such as financial limitations or caregiving responsibilities.

STRATEGIC DIRECTION IV

All 17 respondents felt the language and purpose of Strategic Direction IV were clear and understandable.

SUGGESTIONS FOR IMPROVEMENT

- **Enhanced Communication and Engagement** – Communicate the importance of school and district meetings to parents to increase attendance and participation. Ensure that meetings are accessible and inclusive, with support available in multiple languages.
- **Support for Students and Families** – Provide more comprehensive support for students and families, including increasing the presence of bilingual staff to create welcoming environments and ensuring resources are accessible in various languages.
- **Student Involvement and Education** – Increase student input in decision-making processes and educational initiatives.
- **Expansion of Restorative Practices** – Broaden restorative practices at each school site, emphasizing the importance of maintaining these practices with every student.
- **Career Exploration and Life Skills Education** – Expand career exploration and life skills education, offering courses and workshops on topics such as cooking, sewing, budgeting and vocational programs.

Student Pop-Ups

Pop-up sessions were held at 19 schools throughout the district, including elementary, K-8, middle school, high school, alternative and SpEd programs, to ensure a broad representation of student voices.



STRATEGIC DIRECTION I

Overall, students emphasize the importance of creating a supportive, inclusive and engaging learning environment that *equips them with the skills and knowledge they need for success in school and beyond.*

The following themes highlight what students feel Strategic Direction I means to them and ideas for how the district can make it happen:

- **Supportive Learning Environment** – Students emphasize the importance of feeling supported, respected and welcomed in school. They suggest measures such as having a safe space to talk to teachers, providing individual attention, and promoting positive interactions among students.
- **Academic Support and Resources** – Many students highlight the need for additional academic support, including help with homework, tutoring and access to learning materials like technology, textbooks and art supplies. They also express a desire for more hands-on learning opportunities and diverse elective options.
- **Preparation for the Future** – Students want schools to prepare them for life after graduation by teaching practical life skills such as financial literacy, career exploration, and job interview preparation. They suggest integrating lessons on taxes, budgeting and real-world decision-making into the curriculum.
- **Inclusive and Equitable Education** – There's a call for inclusivity and equity in education, with students advocating for fair access to resources, support for students with disabilities, and cultural awareness training for staff. They also stress the importance of diversity within schools and promoting respect for all identities.
- **Engagement and Communication** – Students want to be more involved in decision-making processes and have their voices heard. They suggest regular check-ins with teachers, opportunities for peer support, and more transparent communication between staff and students.

STRATEGIC DIRECTION II

Students emphasize the importance of creating an inclusive, supportive, and engaging school environment that *provides equal opportunities for all students to succeed academically and personally.*

The following themes highlight what students feel Strategic Direction II means to them and ideas for how the district can make it happen:

- **Supportive School Environment** – Students emphasize the importance of feeling supported, respected and safe in school. They appreciate the efforts made by staff to create a positive atmosphere where everyone is treated equally and has access to resources.
- **Academic Opportunities** – Many students express a desire for more academic challenges, such as more rigorous classes or additional learning opportunities. They



also suggest providing more access to sports, language classes, and diverse extracurricular activities.

- **Inclusivity and Equity** – Students advocate for inclusivity and equity in education, highlighting the need for fair treatment regardless of background, identity or abilities. They suggest measures such as hiring bilingual staff, providing translators and ensuring equal access to resources like Chromebooks and tutoring.
- **Community Engagement** – Students stress the importance of community engagement and communication. They suggest involving parents in decision-making processes, conducting surveys to assess educational justice, and promoting respectful interactions among students.
- **Support for Well-Being** – Students emphasize the importance of mental health support and well-being. They suggest providing resources for dealing with anxiety, bullying and other challenges, as well as promoting positive reinforcement and encouragement from staff and peers.

STRATEGIC DIRECTION III

For Strategic Direction III, students emphasize the importance of *creating a supportive, respectful, and inclusive work environment for school employees, which they believe will ultimately benefit both staff and students alike.*

The following themes highlight what students feel Strategic Direction III means to them and ideas for how the district can make it happen:

- **Employee Support and Appreciation** – Students emphasize the importance of supporting and appreciating school employees, including teachers, staff and administrators. Suggestions include additional training, recognition events like Teacher Appreciation Week, therapy or counseling services, and opportunities for self-care.
- **Creating a Positive Work Environment** – Students advocate for creating a positive and respectful work environment for employees. This includes addressing issues such as classroom management, discipline, workload and providing resources and supplies to support teachers in their work.
- **Communication and Collaboration** – Students stress the importance of communication and collaboration among staff members, administrators and students. They suggest holding meetings to discuss the well-being of everyone in the school community, promoting teamwork, and encouraging respectful interactions.
- **Equitable Treatment and Support Systems** – Students highlight the need for equitable treatment and support systems for all employees, regardless of their role or background. This includes advocating for fair pay, access to resources, opportunities for professional development, and addressing issues such as mental health and stress.
- **Student Involvement in Supporting Staff** – Students express a desire to be involved in supporting school staff, whether through helping with tasks like cleaning, showing



respect and kindness, participating in fundraising efforts for supplies, or assisting teachers in various ways.

STRATEGIC DIRECTION IV

Students emphasize the importance of creating a supportive, inclusive, and empowering environment *where all members of the school community feel valued and supported in their educational journey.*

The following themes highlight what students feel Strategic Direction IV means to them and ideas for how the district can make it happen:

- **Family and Community Engagement** – Students emphasize the importance of involving families and communities in school activities and decisions. Suggestions include more communication with parents about events and academics, creating welcoming environments for families, organizing family events and workshops, and providing resources and support for parents.
- **Supportive Environment** – Students value the supportive environment created by teachers and staff. They suggest providing resources such as technology, school supplies, and access to information, as well as offering support for academic subjects like math and writing. Additionally, they highlight the importance of recognizing students' efforts and providing positive reinforcement.
- **Equitable Access to Resources** – Students express the need for equitable access to resources for all students and families. This includes providing technology at home, offering more field trips and hands-on learning opportunities, supporting students with disabilities, and ensuring access to college and career preparation resources.
- **Communication and Transparency** – Students stress the importance of clear communication and transparency between school staff, students and families. Suggestions include regular updates on academics and events, providing information in multiple languages, and creating opportunities for feedback and input from all stakeholders.
- **Inclusivity and Respect** – Students advocate for inclusivity and respect for all members of the school community. This includes respecting students' and families' cultural, religious and personal backgrounds, promoting kindness and respect among peers, and addressing issues such as bullying and discrimination.
- **Empowerment through Education** – Students believe in empowering themselves and their families through education. They suggest providing information and resources to help parents support their children's learning, offering classes or workshops for parents, and encouraging students to take ownership of their education by staying in school, working hard, and seeking help when needed.

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: I-2
MEETING DATE: 05/14/2024

SUBJECT: English Learner Update

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

DEPARTMENT: Office of Student Learning Assistance

ACTION REQUESTED:

The superintendent is recommending that the board review a report from the Office of Student Learning Assistance regarding programs, data and support provided to English learners. The report will highlight differentiated support for students and the staff who serve them.

RATIONALE/BACKGROUND:

The purpose of this report is to update the board on the English learner program and services. Staff will review changing English learner demographics, language proficiency levels and programs implemented to promote academic progress and welcoming environments.

ATTACHMENT(S):

A: Presentation

BOARD COMMITTEE ACTION/COMMENT:

N/A

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FISCAL IMPACT:

LCFF Supplemental: \$10,000,000 approx.

CalNew Grant: \$700,800

Title 3 EL: \$823,533

ELO: \$400,000

Total: \$11,924,333

Current Year Only On-going

LCAP/STRATEGIC PLAN:

Goal: 1

Focus: 3

Action: N/A

Strategic Plan: 4

Gwyn Dellinger, Director, Student Learning Assistance

Genoveva Navarrete, Program Manager, English Learner Program

APPROVED BY:

Debra Calvin, Ed.D., Associate Superintendent, Educational Services

Amy L. Slavensky, Ph.D., Interim Deputy Superintendent, Schools & Student Support *ALS*

Melissa Bassanelli, Superintendent of Schools *MBS*

English Learner Update

Board of Education
May 14, 2024

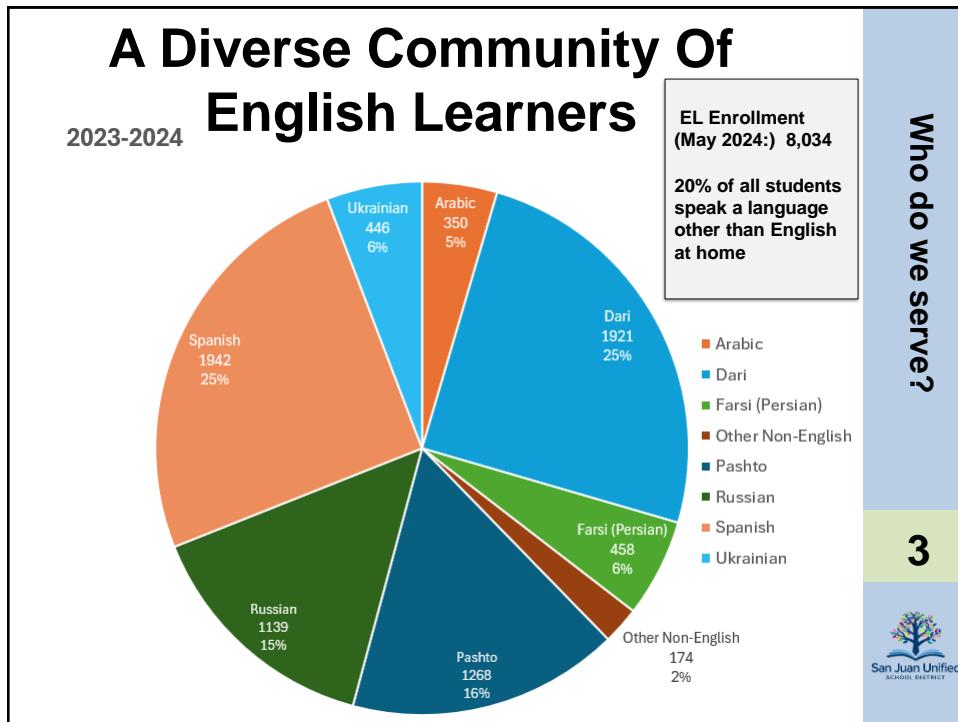
1



- Who do we serve?
- What services do we provide?
- How are our students doing?

2





Categories of English Learners

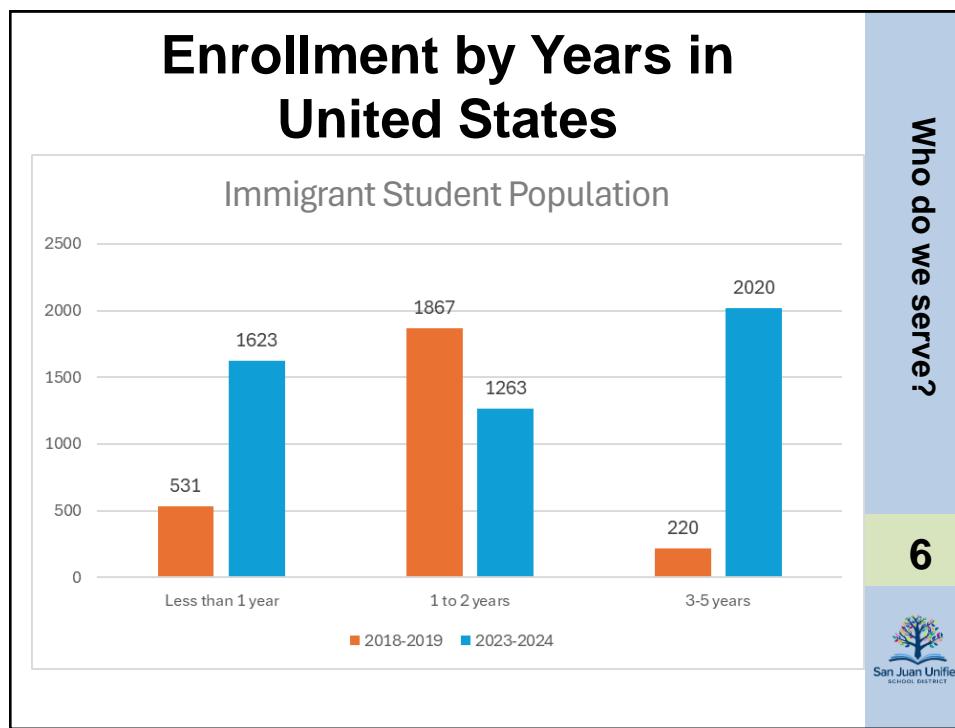
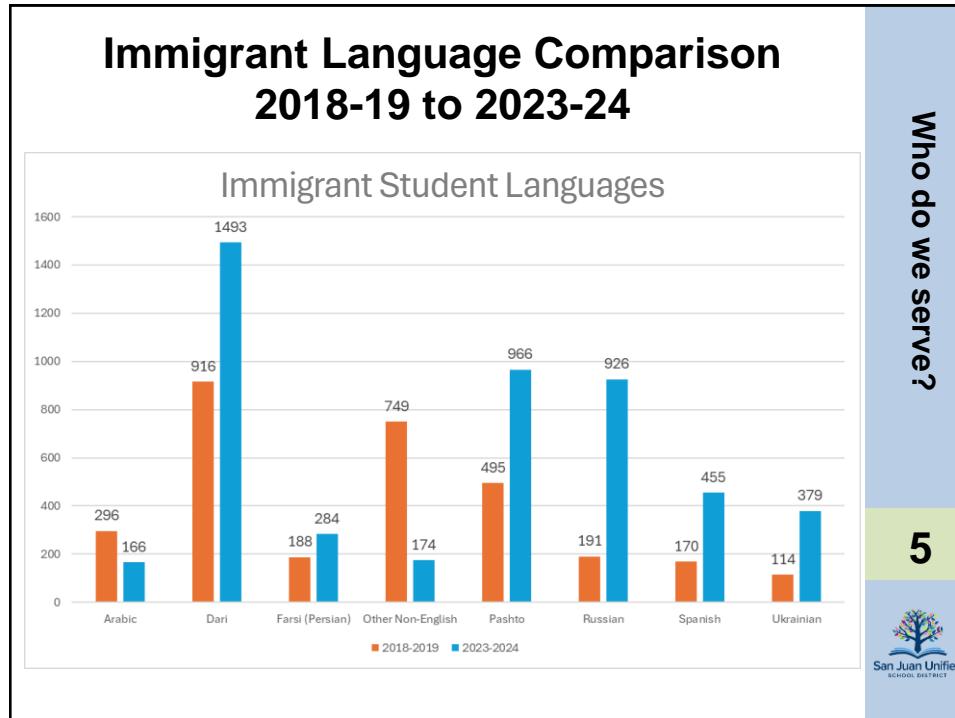
2023-24 Enrollment

Who do we serve?

4



CATEGORIES:	DEFINITIONS:
Immigrant Students: 4,906	Born outside of the US and have been in the country for less than 3 years.
Refugee Students: 4,024	Fled country of origin for fear of persecution. This status is for 5 years.
Initially Fully English Proficient (IFEP) Students: 900	First language assessment has determined student to be initially fully English proficient.
Long Term English Learner (LTEL) Students: 965	Have attended an American school for more than 6 years and not been deemed fully English proficient.
Reclassified Fully English Proficient (RFEP) Monitored Students: 2,548	Reclassified as Fully English Proficient and monitored for 4 years.
(RFEP) – Fully exited Students: 969	Reclassified as Fully English Proficient and fully exited from EL program.



An English learner is an emerging bilingual or multilingual student



	2018-19	2023-24
English Learners	5,877	7,698

Language status is determined by the Home Language Survey and English Language Proficiency Assessment for California (ELPAC)

Who do we serve?

7



**Office of Student Learning Assistance
English Learner & Multicultural
Education Department**



- Bilingual Instructional Assistants (BIA's)
- Cultural Brokers
- Teachers on Special Assignment
- Newcomer Support Team
- Translation and Interpretation




What services do we provide?

8



What services do we provide?	9
<p>System of Support</p> <p><u>Upon Enrollment</u></p> <ul style="list-style-type: none"> • Welcoming process • Language assessment • Placement and scheduling • Additional language support • Parent workshops • Bilingual Assistants • Newcomer Support Team • Community partners <p><u>Ongoing</u></p> <ul style="list-style-type: none"> • Designated English Language Development (ELD) • Access to core content • Cross-cultural Language and Academic Development (CLAD) Teachers • Integrated ELD • Intervention • Expanded learning opportunities • Supplemental programs • Language Assessment • Professional learning • District English Learner Advisory Committee (DELAC) • English Learner Advisory Committee (ELAC) 	

What services do we provide?	10
<h2 data-bbox="342 1116 1092 1237">Additional Programs through Grants and Partnerships</h2> <ul style="list-style-type: none"> • Newcomer Summer Program <ul style="list-style-type: none"> ◦ Provides students the opportunity to acquire academic language through enrichment and mentoring. • Saturday Academy <ul style="list-style-type: none"> ◦ Provides Newcomer students with extra ELD, enrichment opportunities, and social-emotional support. • Language Initiative <ul style="list-style-type: none"> ◦ Teaching staff conversational foreign language to help build a gap in communication between staff and families. • Student Leadership Council <ul style="list-style-type: none"> ◦ Builds leadership skills in high school students to help them succeed in school and future career goals. • Parent Academy <ul style="list-style-type: none"> ◦ Providing parents with knowledge and skills for them to engage in their students education and with their community. • Willow Way Tutoring <ul style="list-style-type: none"> ◦ Online tutoring for Newcomer students. • Council of American-Islamic Relations <ul style="list-style-type: none"> ◦ Student and family support ◦ Youth programs • Sacramento Youth Center <ul style="list-style-type: none"> ◦ Youth mentoring • Family Orientation <ul style="list-style-type: none"> ◦ Families are connected with primary language support and provided information about navigating the United States school system • Student Intake Program <ul style="list-style-type: none"> ◦ Enrollment and placement assistance  	

What services do we provide?
11

Overview of E.L. Achieve

E.L. Achieve is core curriculum that supports systematic designated English language development (ELD) with a structured approach to ELD for English learners.

Key Components:

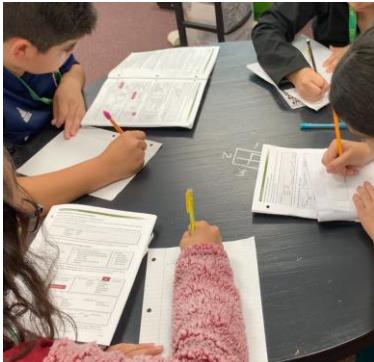
- Consistent ELD standards and benchmarks
- Coordinated curriculum and instructional practices
- Ongoing professional development for educators
- Data-driven assessment and monitoring

 San Juan Unified
SCHOOL DISTRICT

What services do we provide?
12

Introduction to E.L. Achieve

2022-2023 Pilot
Del Paso Manor Elementary



Practitioner Participation and Student Progress

Dates	% of students that made progress toward proficiency	Number of reclassified students
2021-2022	39%	13
2022-2023	60%	35

- Del Paso Manor Elementary School began using the E.L. Achieve Systematic ELD Program in 2022-2023.
- Teachers participated in the 5-day training and all ELs in grades K-6 were taught ELD in leveled groups.

What services do we provide?

13



E.L. Achieve 2023 Fall Cohort

- Del Paso Manor Elementary
- Carriage Elementary
- James Cowan Elementary
- Kingswood K-8 Elementary
- Mariemont Elementary
- Starr King K-8 Elementary



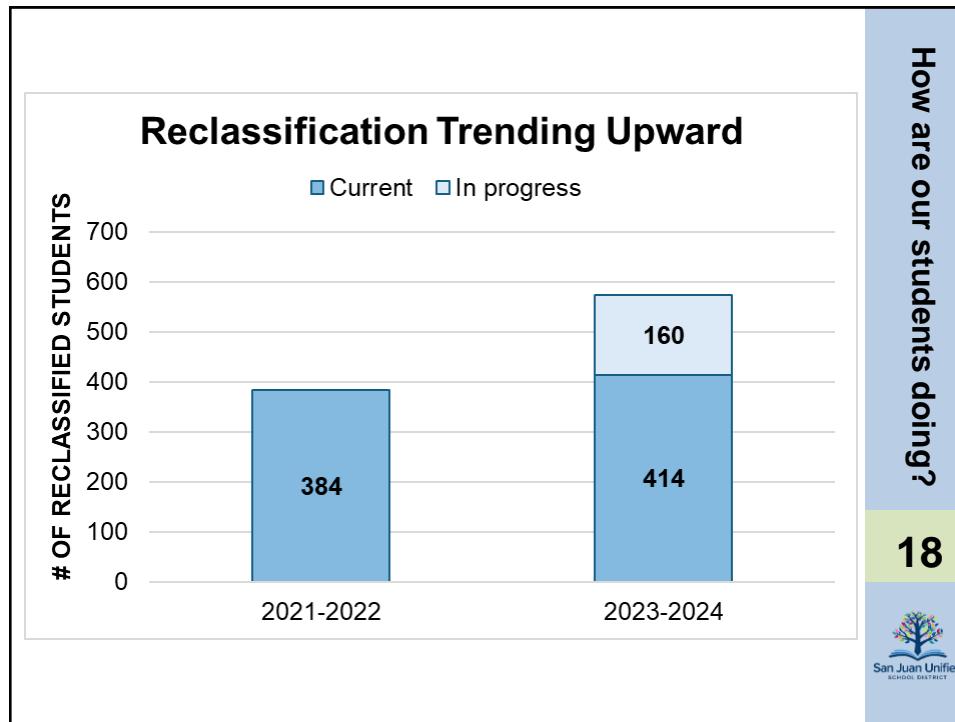
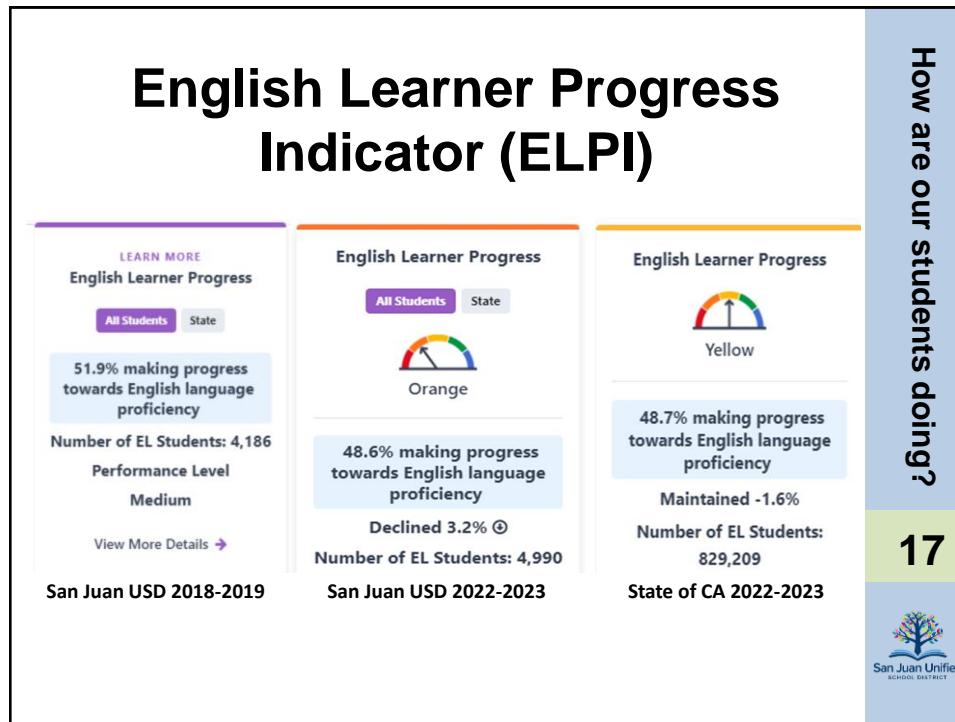
What services do we provide?

14



<h2>E.L. Achieve 2024 Fall Cohort</h2>			<p>What services do we provide?</p>
<u>Elementary</u>	<u>Middle</u>	<u>High School</u>	
<ul style="list-style-type: none">• Cameron Ranch• Mariemont• Mariposa• Kingswood K-8• Starr King K-8	<ul style="list-style-type: none">• Arden• John Barrett• Carnegie• Katherine Johnson• Will Rogers• Sylvan	<ul style="list-style-type: none">• Bella Vista• Del Campo• Encina• Mesa Verde• Mira Loma	<p>15</p>  <p>San Juan Unified SCHOOL DISTRICT</p>

<h2>Educational Practitioner Voice</h2>		<p>What services do we provide?</p>
Stephanie Wagner, ELD Teacher Del Paso Manor Elementary School	16	



Benefits of Reclassification

- Academic access
- Improved confidence
- Graduation readiness
- Equity and inclusion



How are our students doing?

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Student Progress Highlights

Areas to celebrate	Areas for Growth
Reclassification rates continue to rise.	900 students are considered long term English learners.
English learners in kindergarten and grade 4 demonstrated good growth (10 or more percentage points) from fall to winter on the iReady assessment.	Academic indicators for English learners show concerning gaps.
Based on the ELPAC Alternate Assessment, 20% of English Learners with Disabilities made progress.	It's a challenge for English learners to meet grade level content standards while learning academic English.



How are our students doing?

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Reclassification Celebration Video for 2023-2024

Howe Avenue Elementary Reclassification Ceremony



2023-2024

How are our students doing?

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Next Steps

- Collect and respond to multilingual student and community voice to strengthen support for English learners.
- Increase and continue collaboration with site and district leaders to strengthen support at the school level.
- Expand professional learning to meet the needs of our students.
- Expand staff cultural presentations to build understanding and empathy for students arriving from other countries.
- Continue to collaborate with partners to strengthen support for our students who are refugees and immigrants.
- Decrease ELD class sizes for newcomers.
- Expand primary language support through increased staffing.

22



Thank you!

- Questions?



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**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: I-3

MEETING DATE: 05/14/2024

SUBJECT: Land Acknowledgements

CHECK ONE:

For Discussion:

For Action:

Report:

Workshop:

Recognition:

Emergency Action:

DEPARTMENT: Office of Student Learning Assistance

ACTION REQUESTED:

The superintendent is recommending that the board discuss the practice of incorporating Land Acknowledgements into San Juan Unified formal occasions and ceremonies.

RATIONALE/BACKGROUND:

The purpose of this discussion is to highlight the significant impact that Land Acknowledgements have when welcoming and honoring tribal communities.

ATTACHMENT(S):

A: Presentation

BOARD COMMITTEE ACTION/COMMENT:

N/A

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FISCAL IMPACT:

None

PREPARED BY: Gwyn Dellinger, Director, Student Learning Assistance

APPROVED BY: Debra Calvin, Ed.D., Associate Superintendent, Educational Services
Amy Slavensky, Ph.D., Interim Deputy Superintendent, Schools and Student Support *ALS*
Melissa Bassanelli, Superintendent of Schools *MBS*



Land Acknowledgements

Board of Education
May 14, 2024

1

Collaboration

5th Direction

Mr. Calvin Hedrick



American Indian Education Program Parent Advisory Committee

Samantha Manriquez, Coordinator
Bernadette Smith, Chair
Chrystal Bernasconi
Hattie Coleman
Kelly Benken
Nick Bernasconi

2



What is a Land Acknowledgement and why does it matter?

In alignment with our 8 Point Commitment to Educational Justice, the practice of Land Acknowledgement represents a commitment to a culture of inclusion.

It serves as public recognition and invitation to uplift the lives and stories of the Indigenous Peoples who have been displaced from their homelands due to colonialism and genocide.

It is a powerful way of showing respect, honoring the truth, and a step toward correcting the practices that erase Indigenous People's history and culture.

3

Whose Land Are We On?

Miwok

- Miwok in the Sacramento region lived in villages alongside the rivers and streams of the Sierra Nevada from the Cosumnes River on the north to the Calaveras River on the south.

Maidu

- Maidu lived in a territory extending from the Sacramento River to the crest of the Sierra Nevada mountain and centering in the drainage of the Feather and American Rivers in California.

Nisenan

- Nisenan territory reached from the Sierra Nevada mountains on the east to the Sacramento River on the west. Most of the villages were along the rivers that run west out of the mountains: the Yuba River, the Bear River, the American River, and the lower part of the Feather River.

4

Writing a Land Acknowledgement

Considerations:

- Be thoughtful.
- Be purposeful.
- Use present tense when referring to Native Peoples.
- Consult knowledgeable tribal people for input.
- Don't steer away from trauma.
- Make a commitment to create meaningful change in the community.
- Foster inclusion with tribal community.
- Commit to lasting relationships with the Native American community.

5



Land Acknowledgement

Acknowledgement by itself is a small gesture. It becomes meaningful when coupled with authentic relationships and informed action connected to:

- 8 Point Commitment to Educational Justice
- Native American student voice
- Cultural humility and sensitivity trainings
- Representation through partnerships
- Curriculum decisions
- Academic and social-emotional support
- American Indian Education Program

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Sacramento County Office of Education Land Acknowledgement

The history of the Sacramento area, and the people, is rich in heritage, culture and tradition. This area was, and still is, the Tribal land of the Nisenan people. Sacramento was a gathering place for many local tribes who have lived throughout the central valley and the foothills for generations and were the original stewards of this land.

We would like to acknowledge the Southern Maidu people to the North, the Valley and Plains Miwok/Me-Wuk Peoples to the south of the American River, and the Patwin Wintun Peoples to the west of the Sacramento River. We would also like to honor the Wilton Rancheria, the only federally recognized tribe in Sacramento County.

7



Recommendations

- Incorporate a land acknowledgement into San Juan Unified formal occasions and ceremonies, such as high school graduations and board meetings.
- Implement the practice of incorporating land acknowledgements and thereby show a meaningful commitment to systemic change for our tribal community.
- Acknowledge tribes' enduring relationship with the land, while also recognizing the tragic history of genocide inflicted upon California Indigenous People.

8

Next Steps

- Collaboratively develop a land acknowledgement for school and district use that meets the considerations shared on slide 5.
- Utilize historical knowledge and perspectives of the American Indian Education Program Parent Advisory Committee and the Native Community.
- Seek guidance from local tribes and leaders in the community.
- Provide informational sessions and professional learning to build understanding and capacity of school and district staff related to the purpose and importance of land acknowledgement and inclusive practices.



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Thank you for your time!

- Questions and Discussion



10

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: I-4

MEETING DATE: 05/14/2024

SUBJECT: San Juan Choices Charter School Arts, Music & Instructional Materials Discretionary Block Grant

CHECK ONE:

- For Discussion:
For Action:
Report:
Workshop:
Recognition:
Emergency Action:

DEPARTMENT: Admissions and Family Services

ACTION REQUESTED:

The superintendent is recommending that the board discuss and approve the San Juan Choices Charter School (CCS) Arts, Music & Instructional Materials Discretionary Block Grant plan.

San Juan Choices Charter School needs approval of their plan, before they are allowed to spend the approximately \$134,000 they have access to.

RATIONALE/BACKGROUND:

The funds will be used to support programs for the students at CCS.

ATTACHMENT(S):

A: San Juan Choices Charter School Arts, Music & Instructional Materials Discretionary Block Grant spending plan.

BOARD COMMITTEE ACTION/COMMENT:

N/A

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FISCAL IMPACT:

Budget Increase: \$134,000

Additional Budget: \$ N/A

Funding Source: Arts, Music & Instructional Materials Discretionary Block Grant

LCAP/STRATEGIC PLAN:

Goal: N/A Focus: N/A

Action: N/A

Strategic Plan: N/A

PREPARED BY: Brian Ginter, Director, Admissions and Family Services

APPROVED BY: Debra Calvin, Ed.D., Associate Superintendent, Educational Services

Amy L. Slavensky, Ph.D., Interim Deputy Superintendent, Schools and Student Support *ALS*
Melissa Bassanelli, Superintendent of Schools *MBS*

San Juan Choices Charter School
Arts, Music, & Instructional Materials
Discretionary Block Grant
2022-23 through 2025-26
(Funds are available for encumbrance through June 30, 2026)

Per Section 134(a) of Chapter 52 of the Statutes of 2022, the governing board of each school district shall be spent in the following 5 areas: (1) obtaining standards-aligned professional development and instructional materials for specified subject areas; (2) obtaining professional development and instructional materials for improving school climate; (3) developing diverse, culturally relevant and multilingual school library book collections; (4) operating costs, including retirement and health care cost increases; and (5) COVID-19-related costs necessary to keep pupils and staff safe and schools open for in-person instruction.

Total Grant Amount: Estimated \$ 134,112.33

1.Enter description of you plan for spending the fund in obtaining: <ul style="list-style-type: none">• Standards-aligned professional development and instructional materials, in the following subject areas: visual and performing arts, world languages, mathematics, science (including environmental literacy), English language arts (including early literacy), ethnic studies, financial literacy (including the content specified in Section 51284.5 of California Education Code), media literacy, computer science, and history-social science.	
Description: Purchase instructional materials, professional development and curriculum to support teachers and students in grades 6-12 including but not limited to SchoolsPLP, MathXL, IXL, i-Ready, Language Tree (ELD) and other curriculum providers that supports visual and performing arts, world languages, mathematics, science (including environmental literacy), English language arts, ethnic studies, financial literacy (including the content specified in Section 51284.5 of California Education Code), media literacy, computer science, history-social science.	Budget Amount: \$60,000
2.Enter description of you plan for spending the fund in obtaining: <ul style="list-style-type: none">• Instructional materials and professional development aligned to best practices for improving school climate, including training and de-escalation and restorative justice strategies, asset-based pedagogies, anti-bias, transformative social-emotional learning, media and digital literacy, physical education, and learning through play.	
Description: Purchase materials, digital libraries, other online resources and training that enhance our curriculum, professional development and instructional practices related to our career technical education (CTE), media and digital literacy, virtual tutoring, and Social/Emotional learning programs. Provide leadership training and other professional development workshops that will improve our charter school management and instructional practices.	Budget Amount: \$20,000
3. Enter description of you plan for spending the fund in obtaining:	

San Juan Choices Charter School
Arts, Music, & Instructional Materials
Discretionary Block Grant
2022-23 through 2025-26
(Funds are available for encumbrance through June 30, 2026)

<ul style="list-style-type: none"> Diverse book collections and culturally relevant texts, including leveled texts, in both English and pupils' home languages, to support pupils' independent reading, including those in English, pupils' home language, or combination of more than one language. 		
Description:	Purchase materials, digital libraries, books, novels and culturally relevant texts to support the middle school and high school curriculum in both English and pupils' home languages.	Budget Amount: \$5,000
4. Enter description of you plan for spending the fund in obtaining:	<ul style="list-style-type: none"> Operational costs, including but not limited to retirement and health care cost increases. Other Post-Employment Benefits (OPEB), Custodial and maintenance personnel costs, Increased utility costs, Supplies, Transportation, Technology (devices and/or infrastructure) 	
Description:	Support operational costs for our school and employees such as online management programs, building utilities, purchase water & water bottle filling/drinking fountains to provide filtered water for students. Support staff salaries, long-term and short-term disability health care costs and STRS/PERS pension costs. Purchase technology devices that will enhance instruction and the teaching and learning experience for students and staff.	Budget Amount: \$49,112.33
5. Enter description of you plan for spending the fund in obtaining:	<ul style="list-style-type: none"> As related to the COVID-19 pandemic, acquire personal protective equipment, masks, cleaning supplies, COVID-19 tests, ventilation updates, and other similar expenditures, if they are necessary to keep pupils' and staff safe from COVID-19 and schools open for in-person instruction. 	
Description:	No plans at this time for COVID-19 pandemic related spending.	Budget Amount: \$0

LEA Board Approval date (Must be before the fund spending date): _____

Notes:

No application is needed for the block grant fund. No reporting is required.

Funds will be apportioned to school districts at about \$666.08 per 21-22 reported P-2 ADA.

Funds shall be available for encumbrance through the 2025-26 fiscal year.

LEAs are encouraged, but not required, to proportionally use resources received in the above 5 areas.

Resource Code 6762 should be used for this fund.

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: I-5

MEETING DATE: 05/14/2024

SUBJECT: Public Hearing: Conveyance of Easement at Katherine Johnson Middle School to the Sacramento Municipal Utility District

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

DEPARTMENT: Facilities

ACTION REQUESTED:

The superintendent is recommending that the board call a public hearing to solicit public comment and adopt Resolution No. 4128 declaring the conveyance of a permanent easement at Katherine Johnson Middle School to the Sacramento Municipal Utility District (SMUD).

RATIONALE/BACKGROUND:

SMUD is requesting the granting of a permanent utility easement at Katherine Johnson Middle School, on a portion of APN 268-0290-001-0000, for the purposes of constructing, placement, inspection, removal, replacement, maintenance, and use of electrical and communication facilities consisting of aerial wires and cables, with associated poles, crossarms, braces, transformers, capacitors, switches, anchors, guy wires, guy stubs, and all necessary fixtures and appurtenances.

ATTACHMENT(S):

- A: Resolution No. 4128
- B: SMUD Easement Documentation and Legal Description
- C: Aerial Exhibit

PREVIOUS STAFF/BOARD ACTION:

Board of Education: 04/23/2024
Superintendent's Cabinet: 04/15/2024, 05/06/2024

FISCAL IMPACT:

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

LCAP/STRATEGIC PLAN:

Goal: N/A Focus: N/A
Action: N/A

Strategic Plan: N/A

PREPARED BY:

Nicholas Arps, Director, Facilities, Construction and Modernization JA

APPROVED BY:

Frank Camarda, Chief Operations Officer FC
Melissa Bassanelli, Superintendent of Schools MB

**RESOLUTION BY THE SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

**RESOLUTION CONVEYING EASEMENT IN REAL PROPERTY TO THE
SACRAMENTO MUNICIPAL UTILITY DISTRICT**

RESOLUTION NO. 4128

WHEREAS, San Juan Unified School District (“District”) owns real property located at 2641 Kent Drive, Sacramento, CA 95821, California, in the County of Sacramento, State of California, bearing Assessor’s Parcel Number 268-0290-001-0000 and commonly known as Katherine Johnson Middle School; and

WHEREAS, the Sacramento Municipal Utility District (SMUD) has requested that the District convey to SMUD, a permanent easement (“Easement”) for utility purposes, over an area of real property on APN 268-0290-001-0000 for the purposes of constructing, placement, inspection, removal, replacement, maintenance, and use of electrical and communication facilities consisting of aerial wires and cables, with associated poles, crossarms, braces, transformers, capacitors, switches, anchors, guy wires, guy stubs, and all necessary fixtures and appurtenances; as generally described and depicted in Exhibit A (“Easement Area”); and

WHEREAS, the Easement is not now and will not at the time of delivery of possession to SMUD be needed exclusively for classroom or other purposes by the District; and

WHEREAS, it is in the best interest of the District to transfer the Easement to SMUD in that SMUD will maintain the public utility improvements; and

WHEREAS, pursuant to Education Code section 17557, et seq., the District adopted a Resolution of Intention to Convey Easement at its meeting of April 23, 2024, published and posted such Resolution as prescribed, and thereafter held a public hearing on such conveyance on May 14, 2024; and

WHEREAS, no written protests were filed in connection with the proposed conveyance of said Easement.

NOW, THEREFORE, the San Juan Unified School District Board of Education does hereby resolve as follows:

Section 1 Recitals. The foregoing recitals are hereby adopted as true and correct.

Section 2 Conveyance of Easement. Pursuant to Education Code sections 17556, et seq., the District hereby conveys to SMUD the above-described Easement for so long as such Easement is used for the aforesaid purposes. Whenever the Easement is no longer used for said purpose, the interest hereby conveyed shall automatically revert to the District or its successors.

Section 3 Execution of Easement Deed. The Secretary of Board of Education of the District is hereby authorized to execute an easement deed or deeds for the conveyance of the Easement to SMUD on behalf of the District, subject to such changes to the terms of the easement deed or deeds as may be necessary or appropriate to carry out the provisions of this authorizing Resolution.

The foregoing Resolution was adopted by the San Juan Unified School District Board of Education at a meeting of the Board on May 14, 2024, by the following vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

SAN JUAN UNIFIED SCHOOL DISTRICT

By: _____
Pam Costa, President
Board of Education
San Juan Unified School District

ATTESTED TO:

By: _____
Ben Avey, Clerk
Board of Education
San Juan Unified School District

**LEGAL DESCRIPTION
EXHIBIT A**

All that real property situate in the County of Sacramento, State of California, being a portion of Lot 212, as shown on the *Plat of El Paso Park View Tract No.2*, filed for record June 7, 1913, in Book 14 of Maps, at Page 33, Sacramento County Records, and more particularly described in the following two (2) routes:

1. Within a strip of land 10 feet in width, the centerline of which is described as follows:

Commencing at the northwest corner of those certain lands described in the *Grant Deed* recorded August 28, 2008 in Book 20080828, at Page 1686, Official Records of Sacramento County; thence, along the North sideline of said *Grant Deed*, South 89°08'15" East a distance of 42.00 feet to the **Point of Beginning**;

thence, leaving said North sideline northerly, parallel with the West sideline of Belmont Lane, as shown on the *Plat of Town and Country Estates*, filed for record November 17, 1958, in Book 51 of Maps, at Page 26, Sacramento County Records, North 00°05'45" East (South 00°05'45" West per said 51 B.M. 26) a distance of 194.50 feet to a point hereinafter referred to as "A"; thence continuing North 00°05'45" East a distance of 45.00 feet to a point of termination.

2. Within a strip of land 10 feet in width, the centerline of which is described as follows:

Beginning at said point "A"; thence, at a right angle from hereinabove Route 1, South 89°54'15" East a distance of 15 feet to a point of termination.

Excepting therefrom any portion lying within any public highway or road.

The sidelines of said strips shall be lengthened or shortened to meet at angle points and to terminate on the North sideline of said *Grant Deed*.

The Basis of Bearings for this legal description is South 89°08'15" East along the centerline of El Camino Avenue (formerly known as Stevenson Avenue) as shown on said *Plat of El Paso Park View Tract No. 2*.

A plat entitled "Exhibit B" is attached hereto and by this document made a part hereof.




Jeanmarie L Bostley, LS 8452

Date: January 29, 2024

20120307 O.R. 842
PORTION LOT 211
14 B.M. 33

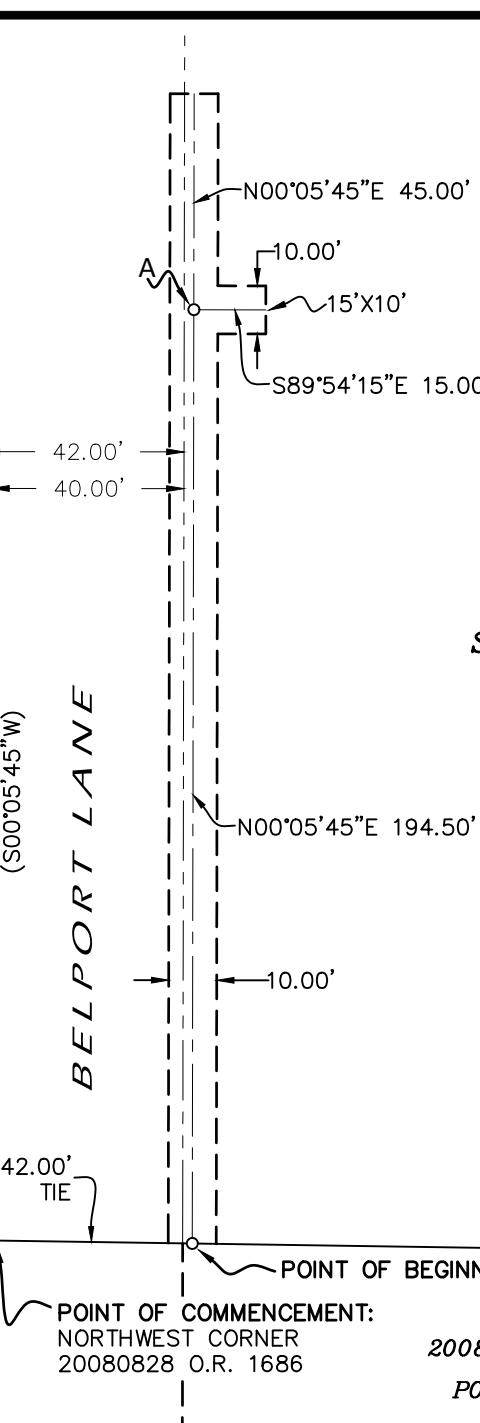
PORTION LOT 211
14 B.M. 33

LOT 26
51 B.M. 26

EL VYRA WAY

LOT 25
51 B.M. 26

PORTION LOT 211
14 B.M. 33



PORTION LOT 212
14 B.M. 33

SAN JUAN UNIFIED
SCHOOL DISTRICT

CREEK SIDE
ELEMENTARY SCHOOL



30190124



Jeanmarie L. Bostley

O.R. = OFFICIAL RECORDS
B.M. = BOOK OF MAPS
() = RECORD BEARING PER 51 B.M. 26
○ = DIMENSION POINT, NOTHING FOUND OR SET

DATE	01/29/24
SCALE	1"=40'
DR.	JLB
CHKD.	CB

TITLE

EXHIBIT B



DWG. NO.
R/W 2024/005

REV.

RECORD AT REQUEST OF AND RETURN TO:
 Sacramento Municipal Utility District
 Attention: Real Estate Services – B 209
 P. O. Box 15830
 Sacramento, CA 95852-1830

No Fee Document – Per Govt. Code Sec. 6103 & 27383
 No County Transfer Tax Per R & T Code 11922

SMUD BY: RJ

KLK

SPACE ABOVE THIS LINE FOR RECORDER'S USE ONLY

APN: 268-0290-001-0000

R/W 2024-005
 SO 30190124

GRANT OF EASEMENT

San Juan Unified School District, a political subdivision of the State of California, Grantor, hereby grants to SACRAMENTO MUNICIPAL UTILITY DISTRICT, a municipal utility district, Grantee, its successors and assigns, the right from time to time to construct, place, inspect, remove, replace, maintain and use electrical and communication facilities consisting of aerial wires and cables, with associated poles, crossarms, braces, transformers, capacitors, switches, anchors, guy wires, guy stubs, and all necessary fixtures and appurtenances, within the following described route.

The easement being granted herein is contained and located on that certain real property, situated in Sacramento County, California, designated by the above referenced Assessor's Parcel Number and more fully described as follows:

Lot 212 as shown on the Subdivision Map entitled "Plat of El Paso Park View Tract NO.2, recorded in the office of Recorder of Sacramento County on June 7, 1913 in Book 14 of Maps, Map No. 33.

Said right includes the trimming and removal by Grantee of any trees or foliage along the Easement Area considered necessary for the complete enjoyment thereof and the right of ingress to and egress from said Easement Area for the purpose of exercising and performing all rights and privileges granted herein. In addition, the Easement Area shall be kept clear of any building or other structure and Grantor will not drill or operate any well within the Easement Area.

The route of said easement is described in EXHIBITS A and B attached hereto and made a part hereof.

Dated: _____, 20_____

Grantor: San Juan Unified School District,
 a Political Subdivision of the State of
 California

BY: _____

Its: _____

Print Name: _____

Katherine Johnson MS New Construction



**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: I-6

MEETING DATE: 05/14/2024

SUBJECT: Public Hearing, Temporary Interfund Borrowing of Cash

CHECK ONE:

- For Discussion:
For Action:
Report:
Workshop:
Recognition:
Emergency Action:

DEPARTMENT: Fiscal Services

ACTION REQUESTED:

The superintendent is recommending that the board hold a public hearing, review and adopt Resolution No. 4134 to permit temporary interfund borrowing of cash.

RATIONALE/BACKGROUND:

Temporary interfund borrowing of cash is permitted by Education Code section (E.C.) 42603 for K-12 districts.

E.C. 42603 states:

... 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. 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. 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. Borrowing shall occur only when the fund or account receiving the money will earn sufficient income, during the current fiscal year, to repay the amount transferred. No more than 85 percent of the maximum of moneys held in any fund or account during a current fiscal year may be transferred.

This action would only be necessary should any fund have a temporary shortage of cash. Funds included:

General Fund	Deferred Maintenance	Measure N Building Fund
Charter Schools Fund	Self-Insurance Fund	Measure P Building Fund
Adult Education Fund	Building Fund	Capital Facilities Fund
Child Development Fund	Measure S Building Fund	Special Reserve Fund – Capital Outlay Project
Cafeteria Fund	Measure J Building Fund	

ATTACHMENT(S):

A: Resolution No 4134

BOARD COMMITTEE ACTION/COMMENT:

N/A

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FISCAL IMPACT:

Current Budget: \$ _____ N/A _____

Additional Budget: \$ _____ N/A _____

Funding Source: _____ N/A _____

(unrestricted base, supplemental, other restricted, etc.)

Current Year Only Ongoing

LCAP/STRATEGIC PLAN:

Goal: N/A Focus: N/A

Action: N/A

Strategic Plan: N/A

PREPARED BY: Kristi Blandford, Director, Fiscal Services
Joel Ryan, Chief Financial Officer



APPROVED BY: Melissa Bassanelli, Superintendent of Schools



San Juan Unified School District
RESOLUTION NO. 4134

**RESOLUTION TO ESTABLISH TEMPORARY INTERFUND
TRANSFERS OF SPECIAL OR RESTRICTED FUND MONEYS**

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;

NOW THEREFORE, BE IT RESOLVED that the Governing Board of the San Juan Unified 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	Building Fund
Charter Schools Fund	Measure S Building Fund
Adult Education Fund	Measure J Building Fund
Child Development Fund	Measure N Building Fund
Cafeteria Fund	Measure P Building Fund
Deferred Maintenance	Capital Facilities Fund
Self Insurance Fund	Special Reserve Fund – Capital Outlay Project

PASSED AND ADOPTED by the Governing Board on May 14, 2024, by the following vote:

Attest to this 14th day of May, 2024

Pam Costa, President

Melissa Bassanelli
Superintendent of Schools

Saul Hernandez, Vice President

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

Ben Avey, Clerk

Paula Villescaz, Member

Tanya Kravchuk, Member

Manuel Perez, Member

Zima Creason, Member

STATE OF CALIFORNIA
COUNTY OF SACRAMENTO

I, Melissa Bassanelli, 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 14th day of May, 2024.

Clerk/Secretary of the Governing Board

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: I-7

MEETING DATE: 05/14/2024

SUBJECT: Tentative Agreement Between San Juan Unified School District and the San Juan Teachers Association

CHECK ONE:

For Discussion:

For Action:

Report:

Workshop:

Recognition:

Emergency Action:

DEPARTMENT: Labor Relations and Government Affairs

ACTION REQUESTED:

The superintendent is recommending that the board approve the San Juan Teachers Association tentative agreement with the San Juan Unified School District.

RATIONALE/BACKGROUND:

Statute requires that the public be made aware of the costs associated with a tentative collective bargaining agreement before it becomes binding on the district or county office of education. Government Code Section 3547.5 states:

“Before a public school employer enters into a written agreement with an exclusive representative covering matters within the scope of representation, the major provisions of the agreement, including, but not limited to, the costs that would be incurred by the public school employer under the agreement for the current and subsequent fiscal years, shall be disclosed at a public meeting of the public school employer in a format established for this purpose by the Superintendent of Public Instruction [G.C. 3547.5(a)].”

This tentative agreement was ratified by San Juan Teachers Association unit members with 98% approval.

ATTACHMENTS:

A: Tentative Agreement Between San Juan Unified School District (District) and the San Juan Teachers Association (Association) April 11, 2024

B: Public Disclosure of Proposed Collective Bargaining Agreement (in accordance with AB1200)

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 05/06/2024

FISCAL IMPACT:

Current Budget: \$ 0

Additional Budget: \$ 30,354,663

Funding Source: Unrestricted and Restricted

Current Year Only On-going

LCAP/STRATEGIC PLAN:

Goal: N/A Focus: N/A

Action: NA

Strategic Plan: N/A

FINANCIAL DATA:

In accordance with AB 1200 (Chapter 1213/1991), GC 3547.5, and CCR, Title V, Section 15449, Fiscal Services has prepared an analysis of the fiscal impact of the proposed agreement and has submitted it to the Sacramento County Office of Education. Costs to the General Fund beginning each year for the San Juan Teachers Association tentative collective bargaining agreement are: an ongoing

increase of \$21,976,491 in 2024-2025. An additional ongoing increase of \$8,378,172 will take effect in 2025-2026.

PREPARED BY: Daniel Thigpen, Executive Director, Labor Relations and Government Affairs *DT*

APPROVED BY: Melissa Bassanelli, Superintendent of Schools *MBS*



Existing Language = Normal
 Language to be removed = Strikethrough
 New language - **Bold**

Tentative Agreement Between
San Juan Unified School District (District)
And the San Juan Teachers Association (Association)
April 11, 2024

Article 11. SALARY SCHEDULES

11.01 Certificated Salary Schedules

The parties agree to adopt the **new TK-12 salary schedules, effective July 1, 20244 (See Attachment A) and July 1, 2025 (See Attachment B)**. This salary schedule shall replace the current salary schedule located in Exhibit D1.

~~11.01 (b) The parties agree that the primary consideration in spring of 2022 is to explore MA/Doctorate Stipend options related to Exhibit D-9 credit~~

~~For continuing Members employed as of July 1, 2021 the District shall provide a one-time off schedule payment equal to 3.5% of each members base salary (Exhibits D1-D4 and F1) and stipends included in contract (Exhibit D9) as of July 1, 2021. This one-time off schedule payment will be paid no later than August 20, 2021. This one-time off schedule payment will not increase a member's base compensation for the 2021-2022 school year.~~

~~The San Juan Unified School District (SJUSD) has an interest in working collaboratively with the San Juan Teacher's Association (SJTA) to create intent language and protocols to facilitate positive and productive conversations and processes on the concept of Total Compensation in the District. The goal is to create agreed upon norms and shared language related to Total Compensation.~~

~~20243-20254 School Year: It is the intent of the parties to provide a salary increase that keeps San Juan Unified School District competitive with surrounding districts.~~

- ~~All base salary schedules (TK-12, ECE, and Adult Ed), shall be increased by a total of \$X,XXX effective as of July 1, 202310%, effective as of July 1, 2022.~~
- ~~ECE: The parties agree that no reduction in staffing will occur as a result of the salary increase. Reductions may still occur based on enrollment decline.~~
- ~~The new salary schedule will be reflected in the members' pay no later than July 31, 2024 November 30, 2022.~~
- ~~The retroactive check for the salary schedules shall be paid no later than June 30, 2024 December 22, 2022.~~
- ~~There is no increase to stipend schedules D-6, D-7, D-8, and D-9 in 2022-2023-2024.~~
- ~~Stipend Schedules D11 (Hard to Staff) will be modified in accordance with the MOUs dated May 15, 2023 and April 5, 2024~~
- **2024-2025 School Year:**
~~The parties agree to reopen Article 11 for bargaining when one or any combination of the following conditions are met:~~

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- o If the enacted California 2024-25 State Budget COLA is funded at a level less than 0.5%, and no augmentation is provided to offset the loss of revenue, both parties agree to revisit the potential impact on the multiyear financial health of the district and examine potential cost saving measures.
- o If the enacted California 2024-25 State Budget COLA is funded at a level in excess of 1.5%, or there is an augmentation to the COLA resulting in an increase of revenues beyond the 1.5%, the district and Association agree to examine potential enhancements to the salary schedule for Year 1 or Year 2.

2025-26 School Year

- o If the enacted California 2025-26 State Budget COLA is funded at a level less than 1.73%, and no augmentation is provided to offset the loss of revenue, both parties agree to revisit the potential impact on the multiyear financial health of the district and examine potential cost saving measures.
- o If the enacted California 2025-26 State Budget COLA is funded at a level in excess of 3.73%, or there is an augmentation to the COLA resulting in an increase of revenues beyond the 3.73%, the district and Association agree to examine potential enhancements to the salary schedule for Year 2.

11.02 Placement on salary schedule:

- a. Credit for outside experience
 - Teaching experience shall be granted on a year for year basis without a cap, up to 10 years of verified experience as noted in Exhibit D
 - Instructional Assistants who gain a certificated credential shall have their experience as an IA count towards placement on the TK-12 salary schedule at a rate of 2-years (or portion thereof) of IA experience shall count as one step of experience.
 - All increases provided by this Article shall be rounded to the nearest dollar as shown in the attached schedules.
- b. Practitioners in the following classifications shall be placed at Step 6 of the Certificated TK-12 Salary schedule, regardless of previous experience being less than 5 years. They shall remain at Step 6 until their accumulated experience warrants movement to Step 7:
 - Social Workers
 - Nurses
 - Special Education service providers
 - Teacher of the Visually Impaired
 - Mobility Specialist/Teacher
 - Teacher of students with Orthopedic Impairment
 - Teacher of Deaf & Hard of Hearing
- c. Speech Language Pathologists shall be placed at Step 7 of the Certificated TK-12 Salary schedule, regardless of previous experience being less than 6 years. They shall remain at Step 7 until their accumulated experience warrants movement to Step 8.
- d. Career Technical Education (CTE)

Experience step placement for CTE teachers for verified industry experience:

- i. Verified industry experience that is directly related to a CTE teaching assignment will be granted year-for-year, excluding the three-year minimum to

JK
DR

earn a preliminary CTE teaching credential, not to exceed placement on step 11.

- a. Ten (10) months of verified industry experience shall constitute one (1) year of service.
- ii. A maximum of eleven (11) steps may be granted for a combination of industry experience and outside teaching experience.
- iii. The District (Human Resources) will verify outside industry experience and determine its relation to a CTE teaching assignment.

e. **Instructional Aides (IAs) transitioning into Certificated positions**

For each two years of service in San Juan Unified (or portion thereof) as an IA, a practitioner shall receive one (1) year of Step Credit on the salary schedule.

A subgroup of both bargaining teams will continue the work of creating a new professional salary schedule that will promote quality teaching and make teaching competitive with comparable professions. The goal is to significantly increase the teacher salary schedule to be competitive with the education labor market and comparable professions. The goal is to increase the base, provide incentives and rewards for knowledge and skills, and reward for additional instructional responsibilities and leadership

11.03 The certificated special assignment schedule is shown as Exhibit D-6.

11.04 Extra-curricular class activities stipends are shown as Exhibit D-7.

11.04(a) Exhibit D-7 shall be modified to read: Application of Elementary/K8 stipends must be presented to Site Leadership Teams and School Site Councils per the language below.

11.05 Athletic services stipends are shown as Exhibit D-8.

11.06 Leadership/support staff stipends are shown as Exhibit D-9

11.07 Advanced Degree Stipends are shown as Exhibit D-10

11.08 Hard to Staff Stipends are shown as Exhibit D-11

11.09 Early Childhood Education salary schedule Exhibit F-1.

a. Exhibit F-1 shall be increased by 2%.

b. The parties agree to create a Work Group during the 2021-2022 school year to discuss 7-hour employees in the Infant/Toddler program and how we report them to STRS/PERS.

a. Exhibit F-1 salary schedule will be replaced by the salary schedule rewrite. As a result of the new F1 salary schedule, Section 7 (Anniversary Increments) shall be deleted.

a. The parties agree to create a Work Group during the 2021-2022 school year to discuss 7-hour employees in the Infant/Toddler program and how we report them to STRS/PERS.

11.10 Adult Education hourly rates are shown (Exhibit D-4).

a. Exhibit-D shall be increased by 52%.

11.12 Movement to Column V (TK-12) and Column VI (ECE)

a. Once a TK-12 practitioner obtains Column V by completing the required hours and submitting them to HR in alignment with Exhibit D, they will not need to track their hours to remain in Column V. All practitioners currently in Column V will remain in Column V for the remainder of their time with San Juan Unified.

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DT

b. Once an ECE practitioner obtains Column VI by completing the required hours and submitting them to HR in alignment with Exhibit F, they will not need to track their hours to remain in Column VI. All practitioners currently in Column VI will remain in Column VI for the remainder of their time with San Juan Unified.

Article 1: CONTRACT PROVISIONS

1.02 Recognition

The Board hereby recognizes the Association as the exclusive representative of the employees in the **non management certificated practitioners teachers'** unit described in Exhibit "A", hereinafter referred to as "members" or "members of the bargaining unit."

1.06 Term

1.06.1 This agreement concludes the Bargaining Cycle for the 2023-24 school year and reflects a two (2) year agreement; including the following reopeners in year 2 (2024-25 for school year 2025-26):

- i. Article 11 (Salary): pending contingency language trigger, Credit for outside experience
- ii. Article 9 (Benefits)
- iii. Article 8 (Working Hours): specifically with regard to instructional calendar
- iv. Article 4 (Transfers): specifically with regards to adjusting moving the transfer timelines early to keep the district competitive with regional hiring timelines
- v. Article 22 (Independent Study): expand article language to reflect the alternative learning environment that includes the following programs in addition to El Sereno High School:
 - ISP - Elementary
 - ISP - Middle
 - La Entrada
 - Meraki

~~This agreement concludes the Article 11 (Salary), Article 8 (Hours) and Article 9 (Employee Benefits) reopeners for the 2020-21 school year. The term of this new agreement is for 2021-2022 and 2022-2023.~~

- vi. Any outstanding Side Letters of Agreement that were renewed as part of this 2023-24 Tentative Agreement.
- vii. Any Article(s) mutually agreed upon by both parties

1.06.2 No later than the first (1st) school board meeting in February, the Association agrees to present its proposals to the Board of Education for a successor contract. No later than six (6) weeks after the presentation of the Association's initial proposal, the District shall respond with its initial proposals and thereafter negotiations shall begin within ten (10) work days.

- i. 1.06.2 will be waived for the 2024-25 Bargaining Cycle - as the interests are identified in section 1.06.1 above
- ii. Timelines in 1.06.2 will resume in 2025 pending the completion of the 2024-25 bargaining cycle in a timely manner. If extensions are needed, both parties agree to extend by up to two months, meaning the first school board meeting in April 2025.

~~1.02 The parties agree to the following: Per article 1.06.02, in the spring of 2022, the parties agree to negotiate the following articles* for the 2022-2023 school year:~~

~~Article 8: Calendar (2024-2025 school year)~~

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DT

Article 9: Benefits

Article 11: Salary (except Article 11.01)

~~*Unless by mutual agreement no other articles will be opened in the spring of 2022.~~

1.07 Distribution of Contract

The Association shall be responsible for distribution of the contract to all bargaining unit members. **The District agrees that this information can be distributed using staff boxes for physical copies or staff email for electronic copies at the Association's discretion.**

1.10 Association Advisory Committee (AAC)

The AAC shall be charged with considering issues related to the LCAP process as determined by Ed Code sections 52060, 52069 and 47606.5. Furthermore, the parties agree that practitioners are an integral part of the planning process and should be included in a meaningful way.

Therefore, the AAC shall be convened annually for the purpose of reviewing, discussing and offering recommendations on the current development and updating of the LCAP. ~~Specific guidelines for the AAC shall be established jointly by the District and the Association in an MOU no later than September 1, 2017. If no guidelines can be mutually agreed upon, the Association will submit input directly to the school board.~~

Article 2: GRIEVANCE

2.06.3 Within seven (7) working days after the initiation of the formal grievance, the immediate supervisor shall hold a hearing on the grievance. **If the immediate supervisor needs additional time to hear the case, and the administrator asks for the extension prior to the end of the sixth day, an extension will be granted within a reasonable and mutually agreed upon timeline.** Within ten (10)~~seven (7)~~ working days after the hearing, the immediate supervisor shall render his/her written decision. **If no decision is rendered within the allotted ten working days, the grievance will be considered to have prevailed.** If the grievant is not represented by the Association, a copy shall be sent to the Association. If the formal grievance is filed within the final fifteen (15) work days of the instructional year, the hearing shall be held within seven (7) work days following the filing, and the written decision shall be rendered within ten (10)~~seven (7)~~ work days following that hearing.

2.07 Formal Grievance—Step 2 (Superintendent)

2.07.1 If the grievant is not satisfied with the disposition of the grievance at Step 1, ~~or if no written decision has been rendered within fifteen (15) work days of the initiation of the grievance,~~ they may file the grievance in writing to the Superintendent within ten (10) work days of receipt of the Step 1 grievance decision or within twenty-five (25) work days of the initiation of the grievance.

2.07.2 Within seven (7) work days after the filing of the grievance with the Superintendent, the latter or his/her designee shall meet with the grievant. **If the Superintendent needs additional time to hear the case, and asks for the extension prior to the end of the sixth day, an extension will be granted within a mutually agreed upon timeline.** Within ten (10)~~seven (7)~~ work days after the meeting, the Superintendent/designee shall render his/her decision in writing. **If no decision is rendered within the allotted ten working days (or mutually agreed upon timeline extension for the decision), the grievance will be considered to have prevailed.** If the grievant is not represented by the Association, a copy shall be served to the Association.

Article 3: SYSTEM OF PROFESSIONAL GROWTH



3.03.9 Formal Observations:

- a. For practitioners that engage in confidential work or work in the homes of families of students, the facilitator shall work in collaboration with the practitioner to determine what, if any, possibilities are available for observation.

3.04.6 Frequency of SPG Cycles

- b. For practitioners with permanent status in years 4, 6, and 8 ~~3, 5, 7 and 9~~ in San Juan at least every other year (or at least every other year in years 4-8 in the event of a leave or other reason)
 - i. After completing the Professional Practice Phase for two years in a row, permanent year 3 participants shall have a modified process:
 - ii. For Practitioners in the modified 3rd year of an SPG cycle:
 - iii. In the event that the facilitator has concerns, the facilitator shall follow the advisory recommendations process as outlined in section 3.05.1.
- c. In years 12 and 15, in San Juan, (or at least every three (3) years for practitioners with permanent status):
- g. During initial implementation, prior year evaluation cycle shall be considered to ensure compliance with Ed Code.

3.04.8

- a. (i) c. Length of terms will be delineated in Article 25 The term of the Peer Facilitator shall be four (4) years, and a member may not serve in the position for more than one (1) consecutive term.
- a). For the initial year of selection, terms will be staggered at four (4), five (5) and six (6) years as determined by lottery.
- b). In order to preserve the integrity of the position and fulfill the intent of the System of Professional Growth, Peer Facilitators may not enter into an administrative training program during his or her term nor be appointed to an administrative position during such a term, nor be appointed to any such position for one school year following their term.

Peer Facilitators shall provide support on a full-time basis (or FTE equivalent for specialized positions) for the purpose of facilitating Practitioners' growth as well as collective evidence of practice.

3.04.8(a) iv. A Peer Facilitator shall retain all rights of bargaining unit members. A Peer Facilitator shall have a work year that is 190 days. In addition to the regular salary, a Peer Facilitator shall receive an annual stipend consistent with Exhibit D-9. See Article 25.06 for additional details around TOSA work year

vi. Upon completion of service, the member has return rights pursuant to Article 25 a right to return to his/her original site:

- a). A practitioner who entered into service as a Peer Facilitator prior to the 24-25 school year, will retain their return rights back to their original site.

b. Total Number of Peer Facilitator Positions:

- i. Instructional Staff = 12 FTE (represents an increase of 3 FTE)
 - a). Caseload = 28 practitioners

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- Peer Facilitators stipends will be adjusted to reflect the addition to their caseload (Exhibit D-9)
- Peer Facilitators who feel the change in caseload places an unacceptable burden on their work, may return to the classroom by notifying HR no later than May 8, 2024

ii. Social Worker = .20 FTE

c. Caseload TBD jointly by co-chairs of PGT

iii. Nurses = .20 FTE

d. Caseload TBD jointly by co-chairs of PGT

iv. Counselor = .50

e. Caseload TBD jointly by co-chairs of PGT

v. SLP = .50 FTE

f. Caseload TBD jointly by co-chairs of PGT

~~c. Length of terms will be delineated in Article 25 The term of the Peer Facilitator shall be four (4) years, and a member may not serve in the position for more than one (1) consecutive term.~~

~~D. For the initial year of selection, terms will be staggered at four (4), five (5) and six (6) years as determined by lottery.~~

~~E. In order to preserve the integrity of the position and fulfill the intent of the System of Professional Growth, Peer Facilitators may not enter into an administrative training program during his or her term nor be appointed to an administrative position during such a term, nor be appointed to any such position for one school year following their term.~~

3.04.9 Facilitator Mentor

~~b) At least five (5) years of recent experience in the district, in classroom instruction and/or direct service to students.~~

~~a. (v) In order to preserve the integrity of the position and fulfill the intent of the System of Professional growth, Facilitator Mentor may not enter into an administrative training program during his or her term nor be appointed to an administrative position during such a term nor be appointed to any such position for one school year following their term.~~

~~b. (vi) Upon completion of service, the member has a right to return to his/her original site.~~

c. After reviewing the evidence, the PGT shall make the final decision **based on evidence**.

3.06 Advisory Phase:

The Advisory Phase shall only be implemented after concerns or questions of performance have been properly documented on the Recommendation to Advisory Form, submitted to and approved by the PGT.

Currently, the Advisory process is designed to support instructional staff. The parties agree to develop an advisory process (and implementation timeline) for non-instructional staff.

3.07 Peer Assistance and Review Phase (PAR)

x. The Referred Teacher shall have the right to request a meeting with the CTS Panel.

3.08.4 CTS Programs

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d. (iv) Length of terms will be delineated in Article 25. The term of the Consulting Teacher shall be four (4) years, and a teacher may not serve in the position for more than one (1) consecutive term. The Lead Consulting Teacher may serve up to a seven (7) year term. The extension must be approved by the CTS Panel on a year-by-year basis. In order to preserve the integrity and fulfill the intent of the Induction, Peer Assistance and Review, and Advisory Programs, applicants must agree not to enter an administrative training program during his or her term nor be appointed to an administrative position during such a term nor be appointed to any such a position for one school year following their term.

(vi) Upon completion of his/her service as a full-time released Consulting Teacher, a teacher has a right to return to his/her original site.

3.09.10 Derogatory materials in a personnel file that are at least four (4) years old shall, upon an employee's written request, be removed or considered removed from the personnel file and placed in a separate sealed file. The End of Year Summary Form may not be removed from the personnel file under this section.

*Additional non-substantive changes were made in Article 3, including updating of pronouns to the inclusive "their."

Article 4: TRANSFERS

4.02.2.2 Elementary Title 1 Schools' classroom teachers shall receive notification of tentative subject and/or grade level assignments for the following school year at least two working days prior to the start of the Involuntary Transfer notification process detailed in section 4.03.9.

4.02.2.2.1 The joint committee established in Article 24.04.1 and 24.05.4 (h) will monitor this process and adjust recommendations.

4.02.6 If a site has an outside certification process for a specialized program (ie: IB or Montessori) staff must be provided options to go through required trainings:

- Summer Training at daily rate of pay
- Release time during school hours to complete training
- After school training at pro-rata share of daily rate

4.04.8 If a practitioner accepts a position for transfer, nothing shall prohibit them from applying to a new position that comes available prior to the end of June deadline.

4.04.9 If a position becomes available after the June timeline, and that position will result in a practitioner receiving additional compensation, the practitioner may apply for that position regardless of timelines.

4.04.9.1 If the practitioner is selected for a new position after July 31, the District can hold the person in the original position for up to 35 work days in an effort to "backfill" the position.

*Additional non-substantive changes were made in Article 4, including updating of pronouns to the inclusive "their"

Article 5: LEAVES

5.09 Bereavement Leave

5.09.1 All members will receive 5 days of bereavement per incident. Members' leave may be extended 5 days by mutual agreement. In the event of death in the immediate family of a member, three



~~(3) days paid leave shall be granted if the bereaved travels 300 or fewer miles one way; five (5) days paid leave if the distance is more than 300 miles one way. Distance shall be established miles traveled one way on the main road between the points of origin or trip and destination.~~

5.09.2 A member may use up to **an additional** 10 days of their his/her accumulated sick leave benefits in case of personal emergency arising from the death of a **family member of the immediate family** without submitting proof of illness.

5.12.2 A member of the bargaining unit shall be granted, ~~upon request, up to five (5) two (2)~~ days of paid **parental** leave to be taken at the time of birth or adoption of their his/her child. These days may be taken at the time of delivery of the child and/or at the time the mother and child leave the hospital. This leave shall not be deducted from sick leave.

5.12.3 A member of the bargaining unit shall be granted six (6) weeks (eight weeks if birth is by cesarean) for recovery, or for care of the recovery of a spouse/partner following the birthing of a child. This time, designated "Pregnancy Disability Leave" shall be standard, have a starting date that mirrors the birth date of the child, and any deviation from the above stated timelines would require a medical note to either shorten or extend.

5.12.4(b): 12 work weeks are equal to 60 working days.

5.30.4 Members returning from paid leaves shall return to their original positions (i.e. the department or grade level at the same school) provided the position exists. If the position does not exist, the section on involuntary transfers shall apply. Upon returning from a paid leave, the member shall continue on the salary schedule in the same manner as if ~~he/she they~~ had been actively teaching in the District during such period. **While in paid leave status (full or differential) members shall continue to accrue longevity and retirement credit at the full rate.**

5.30.5 Members returning from unpaid leaves of absence shall be returned to their prior locations, provided that 4.03 of the Involuntary Transfer section of this contract is not in effect. Upon returning from an unpaid leave, the member shall be placed on the salary schedule in accordance with the salary provisions of this contract. While in unpaid leave status members shall not continue to accrue longevity or retirement credit. Seniority date will remain based on their date of hire.

5.32 Family Care Leave—Unpaid

The District shall follow the requirements of federal and state law with respect to family medical leave. As of 1/4/96, those laws are the Family Medical Leave Act (FMLA, federal) and the California Family Care and Medical Leave Act (CFRA). **Full-time practitioners shall be considered as meeting the eligibility requirements, if they are under contract for the year preceding the start of the leave.**

5.35 District Related Leave

When a practitioner is expected to address an incident that requires them to be present during working hours, the district shall provide substitute time for the member to offset the time the member is present, plus any necessary travel time from the practitioners' site to the event and return to site. Examples can include, but are not limited to: SPG related events, bargaining, all joint committees, surplus meetings, leadership training, grievance hearing, etc.

*Additional non-substantive changes were made in Article 5, including updating of pronouns to the inclusive "their"



Article 6: MEMBER SAFETY AND PROTECTION

6.01.4 The District shall make every reasonable effort to provide Vision/Mobility teachers, Nurses, and Speech Language Pathologists, social workers and counselors with access to adequate space that provides them with confidential facilities and regular school site supplies to meet the needs of students in schools where such services are provided. **If disagreements arise regarding the “effort” that has been made, the item will be referred to the Superintendent, or designee and the President of the Association, or designee for settlement.**

6.01.5 The District shall make every reasonable effort, where practicable, to ensure all new school construction contains designated confidential space for itinerant staff, including but not limited to: Vision/Mobility practitioners, Nurses, Speech Language Pathologists, Social Workers, Adapted Physical Education practitioners and Counselors.

6.04.2 The school Safety Committee, if formed, shall assist the **site/program leadership team and school administration** in all areas related to the maintenance of school safety, order and security. This shall include but not necessarily be limited to school intruders, routine school security procedures, and emergency procedures.

Article 7: CLASS SIZE / RATIOS

7.05 The site/program administrator

The site/program administrator shall make a reasonable effort to avoid scheduling combination classes at any level.

For secondary arts/music classes that meet the requirements, this may include the use of Proposition 28 funds to lower class sizes below contractual ratios.

Elementary: If a combination class is unavoidable, the site/program administrator and the impacted practitioner shall review Exhibit S, “Regarding Combination Class Best Practice” prior to the start of the school year.

~~The District and SJTA agree to establish a Combination Class Joint Committee within 45 days of the SJUSD Board approving this contract. The purpose of this joint committee is to explore interests and opportunities related to the increased workload associated with combination classes. Non-binding recommendations of the committee shall be reported to the respective bargaining teams no later than March 1, 2019.~~

7.07 Special Education Caseloads

The MOU attached as Exhibit HH will replace the language below, until such time as the MOU is negotiated out of the contract or serves to replace the language contained herein. Language unaddressed in the MOU shall be governed by the language in this agreement.

7.08 Caseloads for speech therapists

The MOU attached as Exhibit HH will replace the language below, until such time as the MOU is negotiated out of the contract or serves to replace the language contained herein. Language unaddressed in the MOU shall be governed by the language in this agreement.

7.16 Class Size Adjustments

It is the intent of the District to reduce class size using grade span adjustment funds provided by the Local Control Funding Formula (LCFF). The parties agree that the following stipulations represent “a collectively bargained alternative annual average class enrollment for each school site” in accordance with the



California Education Code 42238.02(d) (3)(B)(i)(D). The provisions below shall supersede and replace current Article 7 K-6 requirements with each successive year of implementation. The parties further agree that for 2013-14 and 2014-15, Kindergarten through 3rd grade classes shall have a loading ratio of 30 students and a maximum class size of 31.

a. Beginning in the 2015-16 school year the parties agree to the following CSR/Grade Span Adjustment implementation for all elementary and K-8 schools up through self-contained 6th grade:

b. Beginning in the 2015-16 school year and after the 20th day of the school year, TK-1 classes will be loaded at 26:1 and shall have an average class enrollment for each school site not to exceed 26.50:1 and a maximum of 27.

c. Beginning in the 2016-17 school year and after the 20th day of the school year, 2nd grade will be loaded at 26:1 and shall have an average class enrollment for each school site not to exceed 26.50:1 and a maximum of 27.

d. Beginning in the 2017-18 school year and after the 20th day of the school year, 3rd grade will be loaded at 26:1 and shall have an average class enrollment for each school site of 26.50:1 and a maximum of 27.

e. Beginning in the 2018-19 school year, 4th grade shall have a loading ratio of 26 and a maximum of 29 students.

f. Beginning in the 2019-20 school year, grades 5th grade shall have a loading ratio of 26 and a maximum of 29 students.

g. Beginning in the 2020-21 school year, grades 6th grade shall have a loading ratio of 26 and a maximum of 29 students.

Additionally, the parties agree to complete an MOU by May 1st, 2024 that can be implemented in the school year (2024-25). The District and Association agree that the following principles and commitments shall guide the implementation of their joint efforts to reduce class sizes and practitioner-to-student ratios, commencing July 1, 2024:

- The parties agree that their joint efforts shall be grounded in equity, prioritizing the investment of resources toward solutions that benefit students in schools with a high density designation (60% or above of “unduplicated pupils” as defined by Education Code 42238.02).
- The District and Association agree that creating the best chance for lasting success in a school system as large and complex as San Juan Unified is to begin this effort with a small-scale, limited pilot of no more than six (6) schools. This pilot will be used for planning, implementation, learning, and adjustment.
- The parties share a commitment to expanding class size reduction efforts to as many high-density schools beyond the initial six (6) pilot schools as feasible over the course of multiple years.
 - The parties share a commitment to exploring the feasibility of expanding future phases into schools with unduplicated pupil concentrations of 40%-59%.
- The parties agree that the planning and implementation of any subsequent phase of this effort beyond the pilot will be dependent upon the learnings of each previous phase of this agreement, but will commence no later than February of 2025.
- The parties agree that by engaging in a multi-stage approach to this effort, the District and Association are building in time to address challenges and to creatively problem-solve.



- The parties also agree that the ability to scale class size reduction beyond the initial six (6) pilot schools will be dependent upon:
 - The ongoing availability of Local Control Funding Formula (LCFF) "Concentration Grant" dollars in future years
 - Data - including but not limited to the the ability to staff at the levels required, staff, student, and and family input, facility capacity, and other unanticipated learnings - gathered during the pilot phase and any future phases of this effort
- The District and the Association agree to identify solutions - during this agreement's pilot phase as well as in any future phases - that avoid displacing students from their resident boundary school.

7.17 Both parties recognize

~~Both parties recognize that because of the funding, the scale of the implementation plan, and the extended timeline, the CSR/CSA timeline may require or allow for adjustments. Therefore, the parties agree that the SJTA/SJUSD Budget Review Committee will convene annually to determine the feasibility of accelerating or slowing the implementation timeline and make recommendations for the full range of options.~~

7.18 Elementary Combination Classes

It is the intent of the District and the Association to provide support to administrators and practitioners when combination classes are unavoidable by providing site administrators and practitioners with a document that they can mutually review prior to the start of the school year. Starting January 1, 2020, before determining who will teach a combination class, staff will give consideration to Exhibit S of the contract. Based on the supports available, a request for volunteers will be made prior to an assignment being made. **Practitioners who are teaching a combination class will receive the stipend on Exhibit D9**

7.20 Nurses

The District agrees to provide ~~21.45 provide2119~~ 17.45 FTE as a minimum number of staffing out of base funding for TK-12. The District, or individual sites, may choose to enhance this number with alternative funding sources.

7.21 Vision and Mobility

The district agrees to provide 4 FTE for Teachers of the Visually Impaired and 1.5 FTE for Mobility Specialists. Student ratios are established in the Special Education MOU (Exhibit HH).

Article 8: HOURS

~~8.01.2 Members may be required to participate in such non instructional functions as attendance at student and parent orientation sessions, PTA/PTSA and Parent Club meetings. Members are required to attend up to two evening events per year such as, Open House (or substitute event[s]) and Back-to-School Night.~~

8.01.3(a) NIDS (Middle School Only)

1. Morning Supervision:



- a. If supervision beyond what is provided by administration is necessary, morning supervision should be equally distributed between all non-special education certificated staff

2. Afternoon Supervision:

- a. For NID equivalency, 1 NID equals two weeks of 15-minute after school supervision.

8.01.4 Supervisory Duties (Elementary)

It is mutually understood that the District and Association recognize the need to ensure the safety of all students. Each elementary school site shall develop a plan that will achieve this end. The plan may utilize persons outside the bargaining unit. Supervisory duties may include one of the following: before school supervision, recess supervision, or after school supervision. **Supervisory duties will but will not exceed one 15 minutes total duty per day unless mutually agreed upon.**

Should no plan for assigning duties be agreed upon by a majority of the bargaining unit members and the principal at that site, the prevailing practice of assigning duties shall continue for the duration of this agreement. **A person required to serve at more than one site during a single day, shall not be required to also perform supervisory duties, except in emergency circumstances.**

Rainy day supervisory duties will be collaboratively determined at the school site.

8.01.6 Secondary and Departmentalized 6-8 Grades at K-8s Preparation Time

Effective July 1, 2016, each full-time classroom teacher assigned to a middle or high school and each 6-8 grade classroom teacher assigned full-time to a K-8 school and teaching in a departmentalized setting, shall have one (1) period (part-time pro rata share) as part of the instructional day for planning and preparation of classes, holding conferences with parents or students, or other related activities. Effective July 1, 2016, Elementary Specialists assigned full-time to departmentalized grades 6-8 at a K-8 shall receive the same preparation time as the classroom teacher. Elementary Specialists assigned part-time to grades 6-8 shall receive one equity day per remaining trimesters. Elementary Specialists may not use equity days on Mondays and/or Fridays.

Members shall not be required to relinquish this time nor to substitute for another member nor to perform other duties more than three (3) times during the school year except to cover emergencies. In addition to the above, members may voluntarily relinquish their prep time to substitute for another member with the prior approval of the site administrator. If a 6th grade at a K-8 is considered to be a self-contained classroom, the teacher shall receive the same preparation as the K-5 teachers and Article 7 Loading Ratio and Class Size Maximums remain in place.

8.01.7 Elementary Preparation Time

- a. For Regular elementary classroom teachers, self contained special education teachers in SDC classes and SDC teachers at Laurel Ruff Center and Ralph Richardson Center, preparation time teachers weekly preparation time will be 200 minutes within the instructional day at District expense and delivered by an elementary specialist. Part-time to be pro-rated.
- b. Non classroom based elementary practitioners,,specialists, RSP teachers, counselors, split site stafftraveling teachers (non classroom based certificated staff) shall receive 200 460 minutes of preparation time each week within the instructional day at District expense and delivered by an elementary specialists other than regular classroom teachers. Part-time to be prorated.



- c. Elementary Specialists who provide instruction to students (and preparation time to classroom teachers) Preparation time teachers shall not be assigned to teach more than the number of instructional minutes per week assigned the grade 4-6 teachers at the site where the elementary specialist prep teacher has the majority of their his/her assignment. Effective 7-1-1999, elementary specialists shall not be required to teach more than 33 periods/week. In the event that additional instructional time is required, the elementary specialists may teach additional sections at the compensation rate identified in Exhibit D-6.
- d. **Missed Prep:** Any missed preparation time will be made up within 30 days of the missed date. for the purposes of this section, missed prep means that a specialist or substitute was not available
- *At the time the preparation time is missed, the teacher can decide to either be paid or have an equal amount of make-up preparation time provided.
- If the choice is made to be paid, it is immediate, e.g., the teacher does not have to wait 30 days to try to have the make-up preparation time provided.
 - Missed preparation time will be compensated at a rate of \$18 for every 15 minute increment (in addition to their regular pay).
 - If the teacher chooses a make-up preparation time, and if after 30 days the make-up has not occurred, the default is pay at the rate referenced above.
- e. Self contained special education teachers who are unable to take their prep time or lunch break shall notify the site administrator of the issue so a solution may be implemented. If no solution addresses the issue, the practitioner may request to be compensated for the time.

8.01.8(a) In order to ensure practitioners receive their 30-minute, uninterrupted duty-free lunch, elementary lunch is 40 minutes. Any elementary or K-8 site that does not currently offer a 40 minute lunch, shall move to a 40-minute lunch no later than the 2025-26 school year in order to plan for site and/or District impacts (including but not limited to transportation).

8.01.11 General faculty meetings shall be limited to an equivalent of one 75-minute meeting a month unless there is an emergency. The general faculty meeting provision does not apply to teacher responsibilities in 8.01.1, 8.01.2 and 8.01.12. Part time members are required to attend the entire faculty meeting unless otherwise provided in this contract or by agreement with the principal. **SJTA Faculty Rep(s) will have 5 minutes of the 75 minutes in accordance with Article 17.05.2**

Faculty meetings are not to be used for PD, unless the leadership team and site agree to use that time for such purpose

8.01.13 Instructional Minutes

9-12: The instructional year shall consist of 64,800 minutes. There will be six, 57-minute periods with 25 minutes passing time and 30 minutes lunch.

6-Period Day Schools: There will be six, 57-minute periods with 25 minutes passing time and 30 minutes lunch. The 9-12 daily schedule will include five periods of instruction and one period of preparation. The current practice regarding zero period is to continue.

Block Schools: There will be four, approximately 90-minute periods with 20 minutes passing time and 30 minutes lunch. The 9-12 daily schedule will include three periods of instruction and one period of preparation. The current practice regarding zero period is to continue


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Alternative Schedules: A school may explore alternative schedules to meet the specific needs of the site. Any alternative schedule must be approved by a super-majority of the staff (70%), the Superintendent or designee, and the President of the Association or designee.

Any agreement to change schedules must be completed no later than November 1 of the year preceding the change.

Duty-free lunch: Regardless of schedule practitioners shall receive 30 minutes of duty-free lunch (not including passing time).

8.01.16 The District and Association agree that if practitioners at a school have a concern regarding the number of meetings, they will follow the "Dispute Resolution Mechanism" in Exhibit M of this contract, work with their site leadership team to resolve the concern.

8.01.17(h) Any Teacher Librarian who works at a site that does not have a textbook clerk shall receive a pro-rata share of the "Beyond Contract" stipend from Exhibit D-6 of the Collective Bargaining Agreement that aligns with the TL's years of experience. This agreement applies only to the 180 calendar days that students are potentially on campus.

(i) Nurses: In the event of an RN vacancy or if a leave occurs, the District acknowledges the position is equivalent to 1.0 FTE.

- The Nurses leadership team currently advises assignments for all nurses based on a point system they have developed to equitably distribute the workload. The system is not exact and is based on a variety of factors and includes their professional judgment.
- As the Nurses leadership team analyzes the workload needs created by a vacancy or leave, the essential work will be identified as portions of an FTE.
- A member must voluntarily accept an assignment greater than 1.0 FTE
- The leadership team determines how the assignment can be divided and what portion of an FTE each part is equal to (the total vacancy/leave may not exceed 1.0 FTE)
- The portion of FTE determined to cover the workload will be paid at either a 0.2 or 0.4 FTE as a "Greater than 1.0 FTE" stipend.
- A 0.2 FTE assignment will be paid the "Beyond Contract" Stipend amount per Exhibit D-6 of the Collective Bargaining Agreement (as a pro rata share based on the number of days the service is provided).
- A 0.4 FTE will be a pro rata share of the "Beyond Contract" stipend amount multiplied by two (as a pro rata share based on the number of days the service is provided).
- The terms outlined above apply to any RN who accepts an extra assignment, including those who are less than 1.0 FTE.
- In the event an LVN (or equivalent position) vacancy or leave occurs, a nurse who provides coverage will be paid at pro rata per diem based on the amount of time the RN needs to provide to cover the essential work.
- When an RN, who has already accepted a "Greater than 1.0 FTE" stipend, is subsequently asked to provide support for an LVN vacancy/leave - and the new assignment impacts their ability to engage in the beyond FTE assignment originally agreed to - the practitioner will not receive less compensation than agreed upon previously.
- The additional assignment may be for up to one semester or one year, depending on the nature and anticipated duration of the opening, but may not exceed one year without offering other nurses the opportunity to contract for the additional assignment.



(j) **Counselors:** If there are extended counseling vacancies at a site, counselors will be paid the "Beyond Contract" stipend under the following conditions:

- a. The "extended" absence or vacancy is defined as a time period exceeding two consecutive school weeks (not less than 15 working days)
- b. Remaining counseling staff and site administration shall first evaluate a variety of solutions to mitigate potential workload impacts on existing counselor(s), with the understanding that:
 - i. A plan to meet the needs of students previously served by the absent counselor/vacant position will be clearly articulated
 - ii. Work that falls within the primary duties and responsibilities of a counselor shall not be supplanted by other staff outside of the bargaining unit.
- c. A member must voluntarily accept an assignment greater than 1.0 FTE.
 - i. Members will be paid in an amount not to exceed the Beyond Contract
- d. If a practitioner feels the circumstances detailed in (j) apply to them, but they are not a school counselor, that practitioner must contact the District and Association in advance of committing to the work, in order to be considered for compensation.

(k) ~~The District and SJTA agree to establish a Greater than 1.0 FTE Joint Committee within 45 days of the SJUSD Board approving this contract. The purpose of the joint committee is to explore options related to class size and contact maximums. Non-binding recommendations of the committee shall be reported to the respective bargaining teams no later than March 1, 2019.~~

8.01.18 Compensation for Over Contact Maximum **for classroom based staff:**

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

8.02 Work Year Calendar

8.02.1 The regular work year for **practitioners** ~~teachers~~ shall be 180 instructional days and **three** ~~two~~ (32) non-instructional days and three (3) staff development days (eighteen [18] hours) for a total of 1865 days. Any **practitioner** ~~teacher~~ unable to make up the staff development as planned by the school site/program shall be provided opportunities to make up the hours. Opportunities for make-up will be in consultation with the site leadership team ~~provided for all members to ensure completion of all required hours. Practitioners~~ ~~Teachers~~ unable to make up the hours may use their accrued sick leave in order to be paid for the 3 staff development days.

8.02.2 For elementary schools (**including K8s**) the non-instructional workdays for members currently on a 1865 (or less) day calendar shall occur the day preceding the first day of instruction, the day preceding the start of the fall Parent-Teacher conferences (unless altered by mutual consent) and following the final day of instruction on the school year calendar.

For secondary schools the non-instructional workdays for members currently on a 1865 (or less) day calendar shall occur the day preceding first day of instruction and the day preceding the start of the second semester (excluding any holiday or non-school day and following the final day of instruction on the school year calendar).

For itinerant staff, not assigned to one division, they will collaborate with their program administrator to determine which non instructional work day best fits their program need
~~Beginning in the 2019-20 school year, the third non instructional workday will become permanent for members currently on a 185 (or less) day calendar.~~



On the **first and third** non-instructional work-days, the site/program administrator may choose to call their general faculty meeting in accordance with 8.01.12, during normal contracted hours. All time outside of the general faculty meeting will be utilized on-site at the discretion of the member. **On the second non-instructional work-day, practitioners shall have the right to work remotely or at their site. If a practitioner plans to work remotely on these days, they will notify their administrator via email prior to leaving campus**

8.02.4 Calendar: (Exhibit C)

- 2024-25
- 2025-26

8.02.7 Collaboration Thursdays

Each instructional Thursday shall be not more than 75 minutes shorter in length than a normal instructional day, except as noted below. The staff workday shall be the length of a normal work day, meaning that the practitioner's contractual work day ceases at the time a normal instructional day ends. The use of collaboration time shall be determined by the Site/program Leadership team (see Article 24 for reaching this determination) and may include, but is not limited to the following: professional development, grade level meetings, departmental meetings, staff collaboration regarding school initiatives related to teaching, learning, and the quality of instruction. Practitioners are not required to sign-in or sign-out during these times. Collaboration Thursdays are not to be used as staff meetings, unless determined by the site leadership team in consultation with the staff.

- a. A Leadership Team may identify up to six (6) Thursdays per year for "Preparation" Thursday time. On Preparation Thursdays, practitioners may utilize the work time in a manner that best meets their professional needs.
- b. Speech and Language Pathologists and Adapted PE (APE) Teachers shall be entitled to a minimum of half of the total of all Collaborative Thursdays to work individually on IEPs, planning or preparing for therapy sessions, and related activities. This time shall not be used for IEP meetings.
 - i. SLPs - remaining collaborative Thursdays shall continue as whole group and mini-team meetings unless adjusted in accordance with Article 24 of this agreement.
 - ii. APE - remaining collaborative Thursdays shall continue with current practice within the department unless adjusted in accordance with Article 24 of this agreement.

8.02.9 Professional Development Hours/Training

~~When professional development is offered (beyond the required 18) system wide using one-time funding sources, participating members shall be paid at their daily rate. For the 2018-19 school year, all members shall have the option of working additional optional professional development hours, at their daily rate of pay, that are outside the school day/calendar year. Members may not use Personal Necessity or Sick time to account for these optional professional development hours.~~

- a. ~~The focus will be on the development and implementation of practices that are responsive to the student needs (e.g. language development, differentiation, numeracy and literacy strategies, equity, and classroom management). The Professional Development days will be designed in consultation and collaboration with SJTA. The dates for these optional days will be calendared as follows:~~



~~Elementary PD Day = Second Secondary teacher workday Secondary PD Day = Second Elementary teacher workday~~

~~PN and Sick Leave may not be used to cover absence on these optional days. Compensation is based on attendance.~~

Mandatory or required training, as required by the State or other entity (outside of SJUSD), will be embedded in the workday. Leadership teams will work with staff to determine the best time to embed the training(s) in collaboration time.

~~8.02.11 Effective July 1, 2019, tThe work year for School Nurses shall be increased by one (1) day equaling 187 days.~~

a. ~~Effective July 1, 2018 School Nurses shall earn an annual stipend included in contract equivalent to a teacher librarian or counselor as identified in Exhibit D-119.~~

~~8.02.12 Effective July 1, 2019, tThe work year for Speech and Language Pathologists shall be increased by one (1) day equaling 187 days.~~

a. ~~Effective July 1, 2018 Speech and Language Pathologists shall earn an annual stipend included in contract of \$4364.00. Effective November 1, 2018, the stipend will be increased to mirror the raise and shall be reflected in Exhibit D-9.~~

~~8.02.13 Effective July 1, 2019, tThe work year for Vision & Mobility Specialists shall be increased by three one (34) days equaling 189 days. If practicable, practitioners will be encouraged to use these days at the start of the school year. The utilization of these days will be determined by the Vision and Mobility teachers and will be communicated to their supervisor.~~

a. Effective July 1, 2023~~18~~ Vision & Mobility specialists shall earn an annual stipend included in contract equivalent to a teacher librarian or counselor as identified in Exhibit HHD-119.

b. Up to 30 hours to be paid at the per diem rate may be used as needed to help with issues such as, IAs out with no sub support of IAs, and support and onboarding of new hires, etc.

c. Timecards will be submitted each month to their direct supervisor.

d. If during the year, the 30 hours are exceeded, the parties agree to meet to review the situation.

e. Clerical support: The District agrees to work with the vision team to develop clear communication and protocols to ensure consistent clerical support throughout the year.

a. The District will establish a temporary partial FTE for an internal candidate looking to finish their Mobility credential.

i. The additional mobility FTE of 0.2 will be created to support a current employee willing to earn their mobility credential.

ii. Since the employee is currently employed in San Juan Unified School District, they would have the option of either reducing their current position by 0.2 FTE or keeping their current 1.0 FTE and earning the beyond contract stipend.

iii. The current mobility teacher would earn an additional 30 hours at the per diem rate for supporting the member earning their mobility credential.

a. Timecards will be submitted each month to their direct supervisor.

iv. Increase vision positions by 1.0 FTE as a recognition of a previously agreed upon solution. The additional FTE will be considered temporary and only in place during term of agreement while structural issues are explored

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~~1. This additional position moves the FTE to 4.0 for vision teachers~~

f. Vision and Mobility teachers will receive a beyond contract stipend when a vacancy occurs and remains unfilled

~~3. Vision teachers that were earning the beyond contract stipend at the start of the 2021-22 school year, will receive back pay for January-June~~

~~v. Any Vision/Mobility teacher employed with the district at a Step that is less than Step 6, will be moved to Step 6 compensation levels effective September 1, 2022; members will remain at Step 6 until such time as their experience level warrants a move to Step 7.~~

~~vi. Any new hires that are vision/mobility teachers (on or after the date of this agreement) will be placed at Step 6 compensation levels.~~

~~8.02.14 Effective upon Board approval of this agreement, the work year for a School Social Worker shall be 195 days of responsibility. Five (5) of those days will remain unscheduled for use mutually agreed upon between administration and the School Social Worker. In the event mutual agreement is not reached on the scheduling, the administrator shall make the decision based on the needs of the site/program. The workday for a school Social Worker shall be similar to a regular onsite teacher workday inclusive of a 30 minute daily duty free lunch. A School Social Worker stipend included in contract is identified inof \$5,000 shall be added to exhibit D-119.~~

a. For School Social Workers hired prior to board ratification (October 9, 2018) of this contract the following shall apply:

~~i. For the 2018-19 school year only, School Social Workers shall work 208 days.~~

~~ii. No reduction in annual income from the 2018-19 school year.~~

~~iv. All leave hours accumulated by School Social Workers prior to this agreement shall not be recalculated. Deductions for leave (sick or personal necessity) moving forward will be consistent with the other bargaining unit members.~~

8.02.14 New Employee Orientations and Notification

The District may require newly hired **practitioners** teachers to serve up to two (2) additional paid non-instructional days during their first two years in the District for District in-service.

a. Whenever the district determines to utilize these additional non-instructional days for new employees related to District in-service, the Association shall partner in both:

8.04.3 During "Parent/Guardian-Teacher Conference Week," Teachers may exchange an equal amount of minimum day conference time for conferences scheduled after the end of the instructional day. The time exchanged shall be pre-arranged with the administrator.

i. Conferences shall be offered to all parents/guardians. Upon request by parents/guardians, the conference may be held on a virtual platform (such as Zoom).

8.05 Equity Days

~~8.05.1 Effective July 1, 2017 the allocation for equity days shall be 3 days per all members in grades 4 through self-contained 6th. These days shall now be utilized to serve all members at the site. The site leadership team, in consultation with the staff, shall determine how these days shall be utilized.~~

~~When the member's classroom or other equally suitable space is unavailable during these planning and preparation days, members may work at an alternate location. The principal must be notified in advance of~~



~~the work location and the member must be available by phone during the instructional day. Members do not need to report to the site on these days unless the guest teacher is absent and every reasonable effort has failed to secure another guest teacher. If the member is required to return to the site, another day shall be allocated for preparation. Due to concerns related to guest teacher availability, members may not use elementary equity days on Mondays and Fridays.~~

~~Effective July 1, 2020, with the complete implementation of Grade Span Adjustment, all language in 8.05.1 will sunset and be replaced with the following:~~

8.05.3 Special Education Service Providers Teachers

All Special education **service providers teachers** shall be given four (4) days for planning, preparing and developing IEPs. When the member's classroom or other equally suitable space is unavailable during these planning and preparation days, members may work at an alternate location. The principal must be notified in advance of the work location and the member must be available by phone during the instructional day. When working at an alternative site, members do not need to report to the site on these days unless the guest teacher is absent and every reasonable effort has failed to secure another guest teacher. If the member is required to return to the site, another day shall be allocated for preparation. Due to concerns related to guest teacher availability, members may not use equity days on Mondays and Fridays.

8.05.3a: Vision and Mobility teachers will be able to use their allotted equity days Mondays and Fridays, at their own discretion based on schedules. The parties agree to this provision as no substitute is needed when equity days are utilized by vision and mobility teachers and their schedules often have the greatest flexibility on Mondays and Fridays. The utilization of these days will be determined by the Vision and Mobility teacher and will be communicated to their supervisor.

8.06 Split Site Staff (2 sites in one day)

San Juan Unified offers a variety of supports and opportunities to students. Some assignments require practitioners to provide direct service to students at two sites within the same work day. Recognizing that split site staff assigned to work at two sites within one day may create complexity to the structure of the workday for affected individuals, When that is the case, the following shall apply:

8.06.1 When possible, split site staff should work with both site administrators (and as applicable the program supervisor), to determine the best schedule to meet student need while adhering to the following:

- a. Travel time between sites is built into the daily schedule:
 - i. practitioner would be provided no less than 45 minutes for travel time
- b. Lunches and Prep Periods, as contractually required, are built into the daily schedule
- c. Start and end times:
 - i. If there is no difference in each school's start and end time, the practitioner would start and end their day according to the schools' schedule.
 - ii. If there is a difference in start and end times, the practitioner would collaborate with site administration and/or the program supervisor to create a schedule that both considers student needs, but also creates a workday that is in alignment with the length of day experienced by their colleagues.

Example: Practitioner is assigned to schools A and B. School A starts at 8:00AM and ends at 2:30PM and school B starts at 8:45AM and ends at 2:45PM. The



practitioner would work with each site to determine which days they start at school A at 8:00 and leave school B at 2:30 and which days they start at School A at 8:45 and leave school B at 2:45.

Itinerant staff working with 3 or more sites create their own schedules and this contract language does not apply.

~~Special Education Support Joint Committee~~

~~The District and SJTA agree to charge the Special Education Support Committee. The purpose of the joint committee is to explore interests and opportunities related to supporting our Special Education teachers. Non binding recommendations of the committee shall be reported to the respective bargaining teams no later than March 1, 2019.~~

***Additional non-substantive changes were made in Article 8, including updating of pronouns to the inclusive “their”**

Article 9: Benefits

9.01.1(e) Domestic partner coverage shall be provided as provided by law.

9.02.3 Members of the bargaining unit who are regularly assigned to be at more than one site shall be entitled to the same preparation period, lunch and relief benefits ~~they he/she~~ would enjoy if the member was assigned to a single site.

(a) If traveling between sites in a single day, in order to maintain 9.02.3, the member shall receive a minimum of 45 additional minutes to transition between sites.

***Additional non-substantive changes were made in Article 9, including updating of pronouns to the inclusive “their”**

Article 10: Pre-retirement

***Additional non-substantive changes were made in Article 9, including updating of pronouns to the inclusive “their”**

Article 12: PROFESSIONAL DUES AND PAYROLL DEDUCTIONS

No Changes

Article 13: Definitions

13.13 “Differential Rate”:

~~The amount paid to the member under the differential rate shall be the member’s daily rate of pay, minus 50% of the daily rate found in Step 1, Column 1 of the Certificated Salary Schedule (Exhibit D1). This rate applies, even if no substitute is employed during the term of the member leave. The amount actually paid to the member, minus the cost of a substitute or, if no substitute is employed, the amount that would have been paid to the substitute. For the purpose of this definition, the substitute rate is the regular guest teacher/regular long-term rate.~~

13.14 “End of Day”

Related to grievances and disciplinary timelines: The end of a day for the purposes of any disciplinary process shall be 5pm on the given day (regardless if the day is a “Work day” or a “Working Day”)



13.15 Pro-rata share

Related to specific stipends, other compensation, and related duties. If a person is part-time, they receive a share of the specified item at the rate of their FTE. For example, an individual on a 60% contract at a secondary school where practitioners are assigned 5 NIDS, would need to complete 3 NIDS.

Article 14: Adult Educators

14.02 Salary.

The salary schedule for Adult Education teachers is set forth in Exhibit D-4. **This rate shall represent a 5% increase over 2023-24 levels.**

Article 15: Schools of Innovation

15.01 The district commits to provide adequate funding to sites that have adopted school wide educational approach including covering any training or materials costs that are required for the school to keep its certification such as: Montessori or IB A School Wide Learning Support Team Joint Committee

~~A School Wide Learning Support Team Joint Committee shall be established to discuss issues and interests related to the School Wide Learning Support Team concept. The committee will convene within 60 days after ratification of this contract. Results of the committee's work and any recommendations shall be made to the respective bargaining teams no later than March 1, 2015.~~

~~School Wide Learning Support Team Joint Committee SJTA and the District agree to form a core team that will meet regularly throughout the 2015 2016 school year to help design, guide and implement prototypes at Encina, Starr King, and the following schools in the Citrus Heights Region (Arlington Heights, Lichen, Sylvan and Mesa Verde).~~

An Extra Curricular Class Activities Stipends Joint Committee

~~An Extra Curricular Class Activities Stipends Joint Committee shall be established to create intent language and an innovative, flexible and site based allocation model related to Exhibit D-7 (Extra Curricular Class Activities Stipends). The committee will convene within 90 days after ratification of this contract. Results of the committee's work and any recommendations shall be made to the respective bargaining teams no later than April 1, 2015.~~

~~The District and SJTA agree to add the following language to the bottom of the Extra Curricular Class Activities Stipends form: Schools with unused Extra Curricular Class Activities stipends who wish to alter the application of those stipends may present innovative proposals to their Site Leadership Team and School Site Councils for approval.~~

Article 16: BARGAINING UNIT MEMBERS' JUST CAUSE, DUE PROCESS AND PROGRESSIVE DISCIPLINE

16.08 Adverse Documentation

Adverse documentation may be removed from the personnel file, consistent with section 3.09.10 of this Agreement. ~~Written warnings may be removed from the school file upon request of the member, if at least four years have passed without further misconduct. Such warnings will be placed in a sealed file and maintained in the District Office, separate from the personnel file.~~



Article 17: ASSOCIATION RIGHTS

17.01 Association Day

The third Wednesday of every month shall be designated as an Association Day. During this day, no District or site meetings involving bargaining unit members shall be scheduled. If the Association President submits a list of alternative Wednesdays prior to May 1 of the preceding year, these Wednesdays shall be considered the Association Days during the following calendar year. In no cases shall this exceed one Wednesday per month.

~~17.05.4 Association activities which comply with Education Code shall be allowed as Professional Growth Activities. Clock hours shall not exceed 15 per semester. The FR shall be granted one (1) in-service credit for salary group placement for each so designated 15 hours under this section.~~

17.09 Facilities:

The Association has a reasonable right to use District equipment and facilities for activities germane to the role of the Association pursuant to the EERA, so long as such use does not result in a significant cost to the District. The Association shall be responsible for setting up and taking down any special equipment, and for leaving the facility in at least as good a condition as when the meeting or function commenced. Such use shall not interfere with the District's use of the facilities. Should such use involve additional custodial time, the Association shall reimburse the District for the costs of the custodian or other employee required to work as a result.

17.10 E-mail/Mail Service:

The Association shall be permitted reasonable use of the District Mail Service or unit member mail boxes, and electronic technologies for communication with bargaining unit members. The unit members must be in compliance with District policy when using either the District email or mail service.

17.11 Professional Growth Fund

- a) The District will provide Professional Growth funds in the amount of \$10,000 annually for use by SJTA members
- b) These funds are to be utilized for activities related to job-connected skills or potential careers within the District.
- c) Hours accumulated utilizing these funds are not eligible for Continuing Education hours.
- d) Union related activities and expenses are not permissible with the SJTA Professional Growth Fund
- e) Members are encouraged to schedule professional development outside of school hours whenever possible.
- f) SJTA President and the Superintendent or designee shall mutually determine the authorization for expenditures from this fund.
- g) This account will rollover annually with the maximum amount accrued not to exceed \$20,000.00.
- h) The timelines and procedures that exist in the SJUSD Travel Conference Approval Expense and Claim Form will be utilized for any travel and/or expenses from this account.

Article 18. PROBATIONARY TEACHERS

18.01 The Assistant Superintendent or his/her designee



The Assistant Superintendent or his/her designee shall give written notice of non-reelection no later than March 15 in the case of second-year probationary employees.

For employees in probationary one status, the district shall give written notice of non-reelection no later than April 30.

Article 19: PROFESSIONAL GROWTH FOR CREDENTIAL RENEWAL

No Change

Article 20: SUMMER SCHOOL PERSONNEL SELECTION

20.05 The hourly rate

The hourly rate set at the beginning of summer school shall remain the same for the full summer school period. If there is a negotiated increase to the Additional Assignment rate prior to the start of summer school, that rate shall be applied at the start of summer school. This is true even if the effective date of the agreement is July 1.

Article 21: EARLY CHILDHOOD EDUCATION

21.01 Contract Provisions.

Early Childhood Education teachers included in the bargaining unit under Exhibit A shall be entitled only those rights under this Agreement which are specified below:

21.01.4 Article 4 - Transfers (except Section 4.03 and 4.04)

21.02 Pre-School Teachers

Prior to submission of grants that fund ECE programs, the parties will review and agree upon any changes that may affect the working conditions or work day/year of SJTA bargaining unit members.

21.03 Child Development Permit Teachers

21.03.2 The parties agree to identify a permanent solution to the issue of Non-Responsibility days for the 2024-25 school year.

Prior to submission of grants that fund ECE programs, the parties will review and agree upon any changes that may affect the working conditions or work day/year of SJTA bargaining unit members.

21.04 Staff Advisory Committee

The Staff Advisory Committee will continue to include a voluntary representative from the Preschool programs. The Program ManagerDirector will continue to share program budget information at these meetings.

21.05 Future Considerations

~~The parties shall continue to address mutual interests. As these interests are reduced to contract language, they will become part of the collective bargaining contract through the regular procedures.~~

ECE Salary Schedule

21.06 The salary schedule rewrite for Early Childhood Education teachers is set forth in Exhibit F-1. Early Childhood Education members participating in instructional, co-curricular, professional



development beyond the regular workday and work year, shall be compensated at the extra assignment rate per Exhibit D-6.

21.06.1 Eliminate the requirement to renew the 105 hours required to stay in column VI

21.08 Voluntary Transfers

ECE practitioners are able to apply for posted positions as the positions become available.

21.09 Hours:

21.09.1 Preschool: Practitioners assigned to preschool work a total of 30 minutes outside the student instructional day. The 30 minutes may occur before or after the instructional day or be split before and after the day.

21.09.2 Infant Toddler: Practitioners assigned to Infant Toddler Center based programs, start of the work day is 30 minutes prior to the student instructional day. The end of the work day is one hour after the end of the student instructional day.

21.09.3 Practitioners assigned to Infant home- based programs start and end times may vary based on families needs (generally 7:30-4:30 or 8:00-5:00)

21.09.4 Discovery Club: For practitioners assigned to Discovery Club the start and end of the work day is the same as the student day. (split shifts)

21.09.5 ECE Nurses: Nurses align to the TK-12 Nurses daily hours

21.10 Center-Based Infant/Toddler Program

21.10.1 All 1.0 FTE SJTA bargaining unit positions in the ECE Center-Based Infant/Toddler program will be 8-hour work days to allow for completion of work at practitioner's discretion, including but not limited to paperwork, planning, assessments, collaboration, etc.

a. All SJTA bargaining unit members currently employed and continuing in these positions will be automatically moved from 7-hour to 8-hour workdays. Any practitioners currently employed as of April 15, 2024 at 7 hours, who wish to remain at 7 hours, may do so. New hires will be hired at 8 hours.

21.10.2 For all bargaining unit members in the Infant Toddler positions, retirement service credit will be reported as 1.0 FTE based on an 8-hour workday.

21.10.3. Prior to submission of grants that fund ECE programs, the parties will review and agree upon any changes that may affect the working conditions or work day/year of SJTA bargaining unit members.

Discovery Club Team	Preschool	Infant Toddler
<ul style="list-style-type: none">● Program Manager● 1 ECE Admin● 1 Content Specialist● 1 TOSA● 2 classroom teachers	<ul style="list-style-type: none">● Program Manager● 1 ECE Admin● 2 Content Specialists● 3 Preschool teachers	<ul style="list-style-type: none">● Program Manager● 1 ECE Admin● 2 Content Specialists● 3 teachers:<ul style="list-style-type: none">○ 2 Infant toddler- Center based○ 1 Infant toddler- Home based

21.11 ECE Work Year Calendars:



21.11.01 Infant Toddler, Preschool, and Discovery Club (DC) calendars will be drafted and sent to SJUSD and SJTA for approval by November 15 of each calendar year.

21.11.02 Grants: Prior to submission of grants, the parties will review and agree upon any changes that may affect the working conditions or work year of SJTA bargaining unit members.

21.11.03 Staff Calendar: Staff Calendar should include the following, but is not limited to:

- Workdays and holidays
- Due dates for assessments, observation data, and other program documents
- Professional Development dates
- Parent meeting dates
- Home visit dates Staff Calendar Committee (SCC):

SCC teams may begin to meet after January 1 to review previous year's staff calendar to determine needed up-dates and revisions. The staff calendar will be submitted to the Program Manager no later than May 10 of each calendar year. Finalized Staff Calendar will be distributed to all staff no later than the last workday of the school year.

Dispute resolution: In the event that the SCC cannot agree upon the details of the Staff Calendar, representatives from SJTA and SJUSD will assist.

21.12 Professional Development (PD) and Staff Meetings:

21.12.01 Infant Toddler:

- Professional Development (PD):
 - 30 hours of professional development per school year (including 12 hours prior to the start of the school year)
 - 21 hours grant aligned
 - 9 hours determined by the leadership team, working in consultation with the staff
 - Optional PD may also be offered throughout the year
- Staff Meetings:
 - Center Based: 1 hour per month
 - Home Based: 2 hours per month

21.13 Preschool:

21.13.01 Professional Development (PD):

- 30 hours of professional development per school year (including 12 hours prior to the start of the school year)
 - 21 hours grant aligned
 - 9 hours determined by the leadership team, working in consultation with the staff
 - Optional PD may also be offered throughout the year

21.13.02 Staff Meetings:

- Embedded in meetings with PD (75 minutes per month)

21.14 Discovery Club:

21.14.01 Staff meeting and PD:

- 2 hours per month (up to 15 minutes of the time may be used by administration)
- 2 days: professional development /planning each year (one in June and one in August).
 - Half of each day is classroom time and the other half is training/professional development.

21.15 Parent-Teacher Meetings:



21.15.01 Infant Toddler:

- Center Based:
 - Home Visits: occur 2 times during the school year - 30 minute minimum per student
 - 10 month sites: Home Visits occur over the summer months (services to be provided by a 12 month employee)
 - 12 months sites: no additional home visits are required
 - Conferences:
 - 10 months sites: 2 conferences (per student, per year). Teachers would not have PD on Thursdays
 - 12 month sites: 2 conferences (per student, per year). Teachers would not have PD on Thursdays
- Home Based:
 - Home visits occur once (per student, per week) for 1.5 hours each
 - Socializations/Family School Day- 22 times over the year for families (two hours each session)
 - Should occur throughout the year
- Parent Meetings:
 - Occur monthly
 - Facilitation may differ by site. Teachers may:
 - facilitate the meetings individually
 - share the meeting facilitation
 - rotate the meeting facilitation
 - May be done in collaboration with other ECE staff
- Preschool:
 - Conferences:
 - Conferences occur twice per year:
 - 1st round: November-December
 - 2nd round: May
 - During conference time, teachers would not have PD on Thursdays
 - Home Visits:
 - Preschool teachers conduct 2 home visits per year per student at 1.5 hours each
 - Early dismissal days for students (3.75 hours instructional time) will occur during home visit weeks
 - During home visit weeks, teachers would not have PD on Thursdays 3
 - Parent Meetings:
 - Occur monthly:
 - The date, time and content of the meetings are determined by the practitioner (must be grant aligned)
 - Meetings shall run up to 60 minutes
 - May be done in collaboration with other ECE staff

Article 22: Independent Study / ALTERNATIVE EDUCATION

22.02 The parties agree to identify the contractualization of the working conditions related to Independent Study / Alternative Education as a priority in the 2024-25 negotiations. Inclusive of the following sites: La Entrada, ISP - Elementary, ISP - Middle School, Home School.

- a. The MOU governing Meraki will be attached to this contract as Exhibit II

Article 23: HOME/HOSPITAL

23.04(a) All HHI practitioners shall receive the full proportion of the Advanced Degree stipend

~~23.05.2 Home/Hospital teachers shall receive sick leave each year equal to that of a full time practitioner working in the classroom. This will be reflected in the sick leave bank as an additional 60 hours per year.~~

Article 24: CREATING AND SUSTAINING A COLLABORATIVE CULTURE

~~24.02.2 At the district departmental level, school nurses and speech pathologists are essential to a comprehensive and cohesive student support system. School nurses and speech language pathologists shall establish elected leadership teams beginning in the 2014-15 school year.~~

Program Leadership Teams: The purpose is to work collaboratively with school sites and the appropriate central office departments and to ensure a fully integrative system of medical and special needs supports. Topics shall include but not be limited to designing and receiving the ongoing professional development and developing criteria for equitable schedules and assignments to meet the needs of students requiring such services. Nurses shall retain their 0.40 FTE released time Lead Nurse. All other provisions of Article 24 apply.

~~Effective July 1, 2019, Adaptive Physical Education Specialists shall establish an elected leadership team.~~

~~Effective July 1, 2019, MTSS support center members shall establish an elected leadership team.~~

The following programs will also have leadership teams:

- Special Ed preschool
- AdPE
- ECE Teams:
 - Infant Toddler
 - Preschool
 - Discovery Club
- MTSS support center staff
- Nurses
- Speech and Language Pathologists
- Home/Hospital
- Adult Education

~~24.03.1 Design and offer training to Leadership Teams in areas such as conflict resolution, leadership development, and the role of an SJTA/District partnership in achieving quality schools.~~

~~Effective July 1, 2016, The District and SJTA will jointly design, offer, and lead annual training to Leadership Teams in areas such as conflict resolution, leadership development, internal communication, consultation with site staff, the role of an SJTA/District partnership in achieving quality schools, and additional topics based on results from needs assessments. Compensation for attendance will be at the Certificated Special Additional Assignment Salary Schedule rates (Exhibit D-6).~~

24.03.2 Establish a professional development plan program in consultation with the staff at each site that is research-based on site needs.

~~24.03.3 Establish and train site leadership teams to participate in the decisions that impact the~~

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success of the school.

24.03.4 Design and offer site labor management training to a maximum of 10 prototype schools (2 high schools, 2 middle schools, 5 elementary schools and one ECE site) in areas such as conflict resolution, leadership development, and the role of a SJTA/District partnership in achieving quality schools. Upon ratification, the District and SJTA will jointly design, offer, and lead prototype site labor management training for areas such as conflict resolution, leadership development, internal communication, consultation with site staff, the role of a SJTA/District partnership in achieving quality schools, and additional topics as determined. Compensation for attendance will be at the Certificated Special Additional Assignment Salary Schedule rates (Exhibit D-6).

24.04 School/Program Leadership Teams

24.04.1 School/Program Leadership Teams

The purpose of the School/Program Leadership Team is to focus on the continuous improvement of site culture as defined by teaching, learning and the quality of instruction.

Every School Leadership Team should operate collaboratively, model effective two-way communication, represent and be accountable to staff, involve staff in decision-making and support staff in the implementation of decisions about instructional practice. This includes (but is not limited to): curriculum and assessment consistent with Board policy, professional development, and school initiatives related to teaching, learning, and the quality of instruction.

~~The District and SJTA agree to establish a Joint Committee within 45 days of the SJUSD Board approving this contract. The purpose of this joint committee is to explore interests and opportunities related to the development of a process that includes practitioner input into grade level assignments and provides feedback to practitioners related to grade level assignment changes at the elementary and K-8 sites. Non-binding recommendations of the committee shall be reported to the respective bargaining teams.~~

24.04.2 Selection Process of School/Program Leadership Team Members

A. Each school/program will be provided the number of staff members for the school leadership team based upon total number of staff members as mutually agreed upon by the District and the SJTA.

B. Each school/program leadership team will range from a minimum of four to a maximum of nine including the principal and a vice principal.

C. The site/program administrator and the SJTA representative will oversee the election process which includes the following steps and guidelines:

- i. Call a meeting to share the information and explain the process. Review the following: ~~Continuum of Emerging Teacher Leadership~~, the Guidelines for School Leadership Teams, and this Article.
- ii. Nominations are made by nominating one's self or others and by submitting the names to the faculty representative in writing. This process is not to be done in a public setting. Nominees must be assigned to the site for the following school year and be committed to the ~~Guidelines for School Leadership Teams set forth in this Agreement~~. ~~criteria and leadership skills outlined in the Continuum of Emerging Teacher Leadership~~.
- iii. If the site/program representative is a nominee, ~~they~~ he/she will appoint a designee to



oversee the election process.

iv. Once the nominations are completed, the names will be placed on a ballot and distributed to all the certificated staff members assigned to that site/program. Staff members may vote for as many nominees as there are number of **vacancies** members on the Leadership Team, but may only vote for each person **on the ballot** one time.

v. Voting:

A. Secret ballots will be returned to the site/program representative or designee who, with the site/program administrator, counts the ballots. **OR Utilize SJTA's approved online voting system**

B. **For the election held in the Spring of 2023-24 and the Spring of 2024-25 school years, the faculty rep and site/program administrator may waive the vote if nominations result in an equal (or lesser) number of nominees and open seats. The parties agree to revisit the impact prior to elections held in the spring of 2025-26 to determine whether the practice should continue.**

24.07 Lead Positions for District Wide Programs

- d. Nurses (.40 FTE)
- e. ~~Speech and Language Pathologists~~
- e. Counselor (1.0 FTE)
- f. Social Worker (.20 FTE)

24.07.2 Release Time (unless otherwise stipulated above)

Article 25: TEACHERS ON SPECIAL ASSIGNMENT (TOSA)

25.01 Defining Characteristics

25.01.1 There are multiple positions that fall under the umbrella of a TOSA that meet the following criteria:

- Majority of assignment does not provide direct service to students
- Majority of assignment in support of adults/program
- Non-classroom based assignment

25.01.2 Positions should be identified as TOSA positions during the application process.

25.01.3 Current positions that are identified as TOSA:

- TOSA
- Curriculum Development
- Peer Facilitators
- Consulting Teachers
- Content Specialists
- Other positions that meet the criteria set forth in 25.02.1

25.03 Terms and Term Limits.

25.03.1 TOSAs, and other positions meeting the above criteria, may serve one term based on previous years of experience in direct service to students as follows:, four (4) year term:

- 8-12 Years Experience: 4-year term
- 13-16 Years Experience: 5-year term
- 17+ Years Experience: 6-year term

ECE Content Specialists have a 6-year term.



25.03.2 A term limit is not a guaranteed amount of time to serve in the position, it is a maximum. Due to the highly autonomous nature of these roles, a person may be removed at the discretion of the governance team (or administrator if the position is overseen by management). The person may be returned to the employee's previous role prior to the end of the term.

Term limits shall apply to any individual. ~~prior to returning to direct service to students / classroom~~. This is true even if a practitioner transfers to or holds more than one position during their term of service. For example: A practitioner with 20 years of direct service to students experience, may serve 4 years in one TOSA position and then 2 years in a different TOSA position. However, in no case may they extend to a 7th year.

- With the exception of 'Lead' positions for CTS and SPG

25.04 Selection, Transfer and Return Rights.

25.04.1 Selection process will be in accordance with Section 4.04.2. Additional selection criteria, including but not limited to high quality communication skills and observation of classroom teaching, shall be developed and mutually agreed upon by the Superintendent or designee and the President of SJTA.

- Consulting Teachers and Peer Facilitators selection process is found under Article 3**

25.04.2 Members applying must have eight (8)five (5)-years of applicable teaching experience in **direct service to students** in accordance with Exhibit D.

25.04.3 After serving a term as a TOSA, individuals must have served a minimum of one (1) year in **an teaching assignment that is in direct service to students**, at a school site **or program**, prior to reapplying.

25.04.4 A TOSA may return to his/her original site within one (1) year. If a TOSA wishes to return to his/her site, they must notify Human Resources, in writing, by April 15. After serving two (2) or more years, a member has a right to return to his/her original site **if a position is available**, or may have **the option to be placed on the involuntary transfer list in the spring**.

(b) **A practitioner hired into a TOSA position prior to the 2023-24 school year will have return right in accordance with the year they were selected into the position.**

25.05 Hours.

The workday for TOSAs shall be similar to a regular on site **practitioner teacher** workday, inclusive of a 30-minute daily duty free lunch. On days when members are required to begin early or stay later due to presentations, school board meetings, and meeting the needs of staffs at school sites, members may adjust their starting and ending time accordingly by consulting with their manager. If a TOSA is assigned to a school site, the TOSA's day shall be the same as other members on site, adhering to all sections of Article 8, excluding preparation time provisions.

25.06 Work Year

~~Effective July 1, 2016;~~ The work year for TOSAs shall be 190 days.

The 190 days are flexible, meaning that if the TOSA and his/her supervisor agree to additional days during the summer, an equal number of days shall become non-work days during the regular year. If there is no mutual agreement regarding the use of flex days, the supervisor may require up to ten flexed days outside their work year calendar.

25.07 Roles and responsibilities may will include, but not be limited to:

CTs and Peer Facilitators roles and responsibilities are found under Article 3

- a. Plan and deliver professional learning opportunities during the school year and during the summer.
- b. Model effective, research-based practices for **practitioners teachers** and administrators which then transfer to classrooms.
- c. Collaborate with school and district groups such as leadership teams, grade level or departments, English language instructional support and student learning.
- d. Pursue professional growth opportunities as related to **practitioner teacher** support and student learning.
- e. Identify optimal resources which support school initiatives and assist in ensuring availability as needed.
- f. **Create stand alone emergency lesson plans for practitioners at all levels TK-12, meeting board policy requirements. Practitioners will have the option to use these plans or create their own.**

Article 26: TEACHER PRACTITIONER INTERNS

26.03 Interns shall be provided with a supervising master practitioner teacher at the school site

Interns shall be provided with a **supervising master practitioner teacher**, at the school site, preferably at a similar grade level or subject matter. The existing intern committee shall establish guidelines regarding release time for interns and **supervising master-practitioners teachers** to arrange observations and meetings. The funding for release time shall be contingent upon state funding. **Beginning with the 2024-25 school year, all supervising practitioners will be eligible for one Intern Advisor Stipend annually.**

26.04 Any residency program the District agrees to negotiate the roles and responsibilities, as well as compensation for all involved members.

Daniel Thigpen - 4-11-24

Daniel Thigpen
Executive Director
Labor Relations and Government Affairs
San Juan Unified School District

4/11/2024

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



ATTACHMENT A

**Credentialed Teachers/Nurses/Counselors, SLPs/Teacher Librarians/Social Worker Salary
Schedule 2024-25**

Step	Col I - BA + 0-29 Semester Units	Col II - BA + 30 Semester Units or MA	Col III - BA + 45 Semester Units or MA + 15 Sem. Units	Col IV - BA + 75 Semester Units or BA + 60 Sem. Units w/ MA or MA + 30 Sem Units	Col V - Column IV + 150 hours of Continuing Education
1	\$ 60,000.00	\$ 61,000.00	\$ 61,500.00	\$ 63,000.00	\$ 65,500.00
2	\$ 60,500.00	\$ 62,000.00	\$ 63,000.00	\$ 63,500.00	\$ 66,000.00
3	\$ 61,000.00	\$ 62,500.00	\$ 65,000.00	\$ 65,000.00	\$ 67,000.00
4	\$ 61,500.00	\$ 63,000.00	\$ 66,000.00	\$ 66,500.00	\$ 71,000.00
5	\$ 62,000.00	\$ 64,000.00	\$ 70,000.00	\$ 71,000.00	\$ 73,500.00
6	\$ 62,500.00	\$ 65,000.00	\$ 70,500.00	\$ 71,500.00	\$ 78,000.00
7	\$ 63,000.00	\$ 66,000.00	\$ 71,000.00	\$ 75,000.00	\$ 82,000.00
8	\$ 63,000.00	\$ 70,000.00	\$ 74,000.00	\$ 79,500.00	\$ 85,000.00
9	\$ 63,000.00	\$ 71,000.00	\$ 78,000.00	\$ 86,000.00	\$ 91,000.00
10	\$ 63,000.00	\$ 72,000.00	\$ 79,000.00	\$ 89,000.00	\$ 94,000.00
11	\$ 63,000.00	\$ 73,000.00	\$ 79,000.00	\$ 92,000.00	\$ 97,000.00
12	\$ 63,000.00	\$ 73,000.00	\$ 79,000.00	\$ 94,000.00	\$ 98,000.00
13	\$ 63,000.00	\$ 73,000.00	\$ 79,000.00	\$ 95,000.00	\$ 100,000.00
14	\$ 63,000.00	\$ 73,000.00	\$ 79,000.00	\$ 96,000.00	\$ 102,000.00
15	\$ 63,000.00	\$ 73,000.00	\$ 81,500.00	\$ 99,000.00	\$ 104,000.00
16	\$ 63,000.00	\$ 73,000.00	\$ 81,500.00	\$ 101,000.00	\$ 106,000.00
17	\$ 63,000.00	\$ 73,000.00	\$ 81,500.00	\$ 102,000.00	\$ 108,000.00
18	\$ 64,000.00	\$ 73,500.00	\$ 81,500.00	\$ 103,000.00	\$ 109,000.00
19	\$ 64,000.00	\$ 73,500.00	\$ 81,500.00	\$ 104,000.00	\$ 111,000.00
20	\$ 66,100.00	\$ 77,000.00	\$ 84,500.00	\$ 105,000.00	\$ 118,000.00



ATTACHMENT B

Credentialed Teachers/Nurses/Counselors, SLPs/Teacher Librarians/Social Worker Salary Schedule 2025-26

Step	Col I - BA + 0-29 Semester Units	Col II - BA + 30 Semester Units or MA	Col III - BA + 45 Semester Units or MA + 15 Sem. Units	Col IV - BA + 75 Semester Units or BA + 60 Sem. Units w/ MA or MA + 30 Sem Units	Col V - Column IV + 150 hours of Continuing Education
1	\$ 60,000.00	\$ 61,000.00	\$ 62,500.00	\$ 64,500.00	\$ 65,500.00
2	\$ 60,500.00	\$ 62,000.00	\$ 63,000.00	\$ 65,000.00	\$ 66,000.00
3	\$ 61,000.00	\$ 62,500.00	\$ 65,000.00	\$ 65,500.00	\$ 67,000.00
4	\$ 61,500.00	\$ 63,000.00	\$ 66,000.00	\$ 66,500.00	\$ 71,000.00
5	\$ 62,000.00	\$ 64,000.00	\$ 70,000.00	\$ 71,000.00	\$ 73,500.00
6	\$ 62,500.00	\$ 65,000.00	\$ 70,500.00	\$ 71,500.00	\$ 78,000.00
7	\$ 63,000.00	\$ 66,000.00	\$ 71,000.00	\$ 75,000.00	\$ 82,000.00
8	\$ 63,000.00	\$ 70,000.00	\$ 74,000.00	\$ 79,500.00	\$ 86,000.00
9	\$ 63,000.00	\$ 71,000.00	\$ 78,000.00	\$ 86,000.00	\$ 92,000.00
10	\$ 63,000.00	\$ 72,000.00	\$ 79,000.00	\$ 89,000.00	\$ 95,000.00
11	\$ 63,000.00	\$ 73,000.00	\$ 79,000.00	\$ 92,000.00	\$ 98,000.00
12	\$ 63,000.00	\$ 73,000.00	\$ 79,000.00	\$ 94,000.00	\$ 100,000.00
13	\$ 63,000.00	\$ 73,000.00	\$ 79,000.00	\$ 95,000.00	\$ 102,000.00
14	\$ 63,000.00	\$ 73,000.00	\$ 79,000.00	\$ 96,000.00	\$ 105,000.00
15	\$ 63,000.00	\$ 73,000.00	\$ 81,500.00	\$ 99,000.00	\$ 107,000.00
16	\$ 63,000.00	\$ 73,000.00	\$ 81,500.00	\$ 101,000.00	\$ 109,000.00
17	\$ 63,000.00	\$ 73,000.00	\$ 81,500.00	\$ 102,000.00	\$ 110,000.00
18	\$ 64,000.00	\$ 73,500.00	\$ 81,500.00	\$ 103,000.00	\$ 115,000.00
19	\$ 64,000.00	\$ 73,500.00	\$ 81,500.00	\$ 104,000.00	\$ 117,000.00
20	\$ 66,100.00	\$ 77,000.00	\$ 84,500.00	\$ 106,000.00	\$ 126,000.00



ECE Practitioners Working a 183 Day Calender - Annual Salary						
183 Days	I	II	III	IV	V	VI
Years of service	AA or 12-61 Units	BA	BA with site Supervisor Permit	BA+30 or BA+MA	CE	
1	\$ 35,000.00	\$ 44,000.00	\$ 52,000.00	\$ 57,000.00	\$ 60,000.00	
2	\$ 35,500.00	\$ 45,000.00	\$ 54,000.00	\$ 59,000.00	\$ 62,000.00	
3	\$ 36,000.00	\$ 46,000.00	\$ 55,000.00	\$ 61,000.00	\$ 63,000.00	
4	\$ 36,500.00	\$ 47,000.00	\$ 57,000.00	\$ 63,500.00	\$ 65,000.00	
5	\$ 37,500.00	\$ 50,000.00	\$ 60,000.00	\$ 65,500.00	\$ 67,000.00	
6	\$ 37,500.00	\$ 50,000.00	\$ 61,000.00	\$ 67,500.00	\$ 69,000.00	
7	\$ 37,500.00	\$ 50,000.00	\$ 62,000.00	\$ 69,500.00	\$ 72,000.00	
8	\$ 37,500.00	\$ 50,000.00	\$ 63,000.00	\$ 71,000.00	\$ 73,000.00	
9	\$ 37,500.00	\$ 50,000.00	\$ 64,000.00	\$ 71,500.00	\$ 73,500.00	
10	\$ 37,500.00	\$ 50,000.00	\$ 65,000.00	\$ 72,000.00	\$ 74,000.00	
11	\$ 37,500.00	\$ 50,000.00	\$ 66,000.00	\$ 72,500.00	\$ 74,500.00	
12	\$ 37,500.00	\$ 50,000.00	\$ 67,000.00	\$ 73,000.00	\$ 75,000.00	
13	\$ 37,500.00	\$ 50,000.00	\$ 68,000.00	\$ 73,500.00	\$ 75,500.00	
14	\$ 37,500.00	\$ 50,000.00	\$ 69,000.00	\$ 74,000.00	\$ 76,000.00	
15	\$ 38,000.00	\$ 51,000.00	\$ 70,000.00	\$ 74,500.00	\$ 76,500.00	
16	\$ 38,000.00	\$ 52,000.00	\$ 71,000.00	\$ 75,000.00	\$ 77,000.00	
17	\$ 38,000.00	\$ 53,000.00	\$ 72,000.00	\$ 75,500.00	\$ 77,500.00	
18	\$ 40,000.00	\$ 54,000.00	\$ 73,000.00	\$ 76,000.00	\$ 78,000.00	
19	\$ 40,000.00	\$ 55,000.00	\$ 74,000.00	\$ 77,000.00	\$ 79,000.00	
20	\$ 43,000.00	\$ 57,000.00	\$ 75,000.00	\$ 80,000.00	\$ 83,000.00	

ECE Daily Rate						
183 Days	I	II	III	IV	V	VI
Years of service	AA or 12-61 Units	BA	BA with site Supervisor Permit	BA+30 or BA+MA	CE	
1	\$ 191.26	\$ 240.44	\$ 284.15	\$ 311.48	\$ 327.87	
2	\$ 193.99	\$ 245.90	\$ 295.08	\$ 322.40	\$ 338.80	
3	\$ 196.72	\$ 251.37	\$ 300.55	\$ 333.33	\$ 344.26	
4	\$ 199.45	\$ 256.83	\$ 311.48	\$ 346.99	\$ 355.19	
5	\$ 204.92	\$ 273.22	\$ 327.87	\$ 357.92	\$ 366.12	
6	\$ 204.92	\$ 273.22	\$ 333.33	\$ 368.85	\$ 377.05	
7	\$ 204.92	\$ 273.22	\$ 338.80	\$ 379.78	\$ 393.44	
8	\$ 204.92	\$ 273.22	\$ 344.26	\$ 387.98	\$ 398.91	
9	\$ 204.92	\$ 273.22	\$ 349.73	\$ 390.71	\$ 401.64	
10	\$ 204.92	\$ 273.22	\$ 355.19	\$ 393.44	\$ 404.37	
11	\$ 204.92	\$ 273.22	\$ 360.66	\$ 396.17	\$ 407.10	
12	\$ 204.92	\$ 273.22	\$ 366.12	\$ 398.91	\$ 409.84	
13	\$ 204.92	\$ 273.22	\$ 371.58	\$ 401.64	\$ 412.57	
14	\$ 204.92	\$ 273.22	\$ 377.05	\$ 404.37	\$ 415.30	
15	\$ 207.65	\$ 278.69	\$ 382.51	\$ 407.10	\$ 418.03	
16	\$ 207.65	\$ 284.15	\$ 387.98	\$ 409.84	\$ 420.77	
17	\$ 207.65	\$ 289.62	\$ 393.44	\$ 412.57	\$ 423.50	
18	\$ 218.58	\$ 295.08	\$ 398.91	\$ 415.30	\$ 426.23	
19	\$ 218.58	\$ 300.55	\$ 404.37	\$ 420.77	\$ 431.69	
20	\$ 234.97	\$ 311.48	\$ 409.84	\$ 437.16	\$ 453.55	

ECE Hourly Rate						
183 Days	I	II	III	IV	V	VI
Years of service	AA or 12-61 Units	BA	BA with site Supervisor Permit	BA+30 or BA+MA	CE	
1	\$ 23.91	\$ 30.05	\$ 35.52	\$ 38.93	\$ 40.98	
2	\$ 24.25	\$ 30.74	\$ 36.89	\$ 40.30	\$ 42.35	
3	\$ 24.59	\$ 31.42	\$ 37.57	\$ 41.67	\$ 43.03	
4	\$ 24.93	\$ 32.10	\$ 38.93	\$ 43.37	\$ 44.40	
5	\$ 25.61	\$ 34.15	\$ 40.98	\$ 44.74	\$ 45.77	
6	\$ 25.61	\$ 34.15	\$ 41.67	\$ 46.11	\$ 47.13	
7	\$ 25.61	\$ 34.15	\$ 42.35	\$ 47.47	\$ 49.18	
8	\$ 25.61	\$ 34.15	\$ 43.03	\$ 48.50	\$ 49.86	
9	\$ 25.61	\$ 34.15	\$ 43.72	\$ 48.84	\$ 50.20	
10	\$ 25.61	\$ 34.15	\$ 44.40	\$ 49.18	\$ 50.55	
11	\$ 25.61	\$ 34.15	\$ 45.08	\$ 49.52	\$ 50.89	
12	\$ 25.61	\$ 34.15	\$ 45.77	\$ 49.86	\$ 51.23	
13	\$ 25.61	\$ 34.15	\$ 46.45	\$ 50.20	\$ 51.57	
14	\$ 25.61	\$ 34.15	\$ 47.13	\$ 50.55	\$ 51.91	
15	\$ 25.96	\$ 34.84	\$ 47.81	\$ 50.89	\$ 52.25	
16	\$ 25.96	\$ 35.52	\$ 48.50	\$ 51.23	\$ 52.60	
17	\$ 25.96	\$ 36.20	\$ 49.18	\$ 51.57	\$ 52.94	
18	\$ 27.32	\$ 36.89	\$ 49.86	\$ 51.91	\$ 53.28	
19	\$ 27.32	\$ 37.57	\$ 50.55	\$ 52.60	\$ 53.96	
20	\$ 29.37	\$ 38.93	\$ 51.23	\$ 54.64	\$ 56.69	

San Juan Unified School District
DRAFT 2025-2026 School Year Calendar

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

Holidays

- September 1, Labor Day
- October 6, Local Holiday
- November 11, Veterans' Day
- November 27, Thanksgiving Day
- November 28, Local Holiday
- December 25, Christmas Day
- December 26, 29, 30, 31 Winter Recess
- January 1, New Year's Day
- January 19, Martin Luther King, Jr. Day
- February 16, Presidents' Day
- February 17, Lincoln's Day Observed
- April 3, Local Holiday
- May 25, Memorial Day

First/Last Day of Service
 August 12 - June 10

Student First/Last Day August 14 - June 9	Work Days 180 Non-Instructional Days* 6 Total Days 186
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***Non-Instructional Days**

- August 12 - Staff Development Day
- August 13- Teacher Work Day
- November 10 - Elementary & K8 Teacher Work Day
- November 10 - MS & HS Teacher PD Day (optional)
- January 5 - MS & HS Teacher Work Day
- January 5- Elementary & K8 Teacher PD Day (optional)
- June 10- Teacher Work Day (185 day or less only)

*Plus 2 Staff Development Days (Legislative-Non ADA): as determined per site

Semester Dates - Secondary (MS & HS)

August 14 - January 5 = 83 Days
 January 6 - June 10 = 97 Days

Trimester Dates - Elementary & K8

August 14 - November 7 (13 weeks)
 November 12 - March 6 (13 weeks)
 March 9- June 10 (13 weeks)

Strike through days represent "School Recess Days"

Board Approved:

PUBLIC DISCLOSURE OF PROPOSED COLLECTIVE BARGAINING AGREEMENT
in accordance with AB 1200 (Chapter 1213/Statutes 1991), AB 2756 (Chapter 52/Statutes 2004), GC 3547.5

Name of School District:	San Juan Unified School District		
Name of Bargaining Unit:	San Juan Teachers Association (SJTA)		
Certificated, Classified, Other:	Certificated		

The proposed agreement covers the period beginning:	July 1, 2024 (date)	and ending:	June 30, 2026 (date)
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The Governing Board will act upon this agreement on:	May 14, 2024 (date)
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Note: This form, along with a copy of the proposed agreement, must be submitted to the County Office at least ten (10) working days prior to the date the Governing Board will take action.

A. Proposed Change in Compensation

Bargaining Unit Compensation		Fiscal Impact of Proposed Agreement			
		(Complete Years 2 and 3 multiyear and overlapping agreements and Step & Column increases)			
		Annual Cost Prior to Proposed Settlement	Year 1 Increase/(Decrease) 2024-25	Year 2 Increase/(Decrease) 2025-26	Year 3 Increase/(Decrease) 2026-27
1. Salary Schedule Including Step and Column	\$ 212,366,205	\$ 16,145,972	\$ 6,962,269	\$ 207,974	
		7.60%	3.05%	0.09%	
2. Other Compensation Stipends, Bonuses, Longevity, Overtime, Differential, Callback or Standby Pay, etc.	\$ 20,671,556	\$ 1,810,125	\$ 16,291	\$ 16,438	
		8.76%	0.07%	0.07%	
Description of Other Compensation					
3. Statutory Benefits - STRS, PERS, FICA, WC, UI, Medicare, etc.	\$ 59,632,552	\$ 4,594,826	\$ 1,785,759	\$ 57,425	
		7.71%	2.78%	0.09%	
4. Health/Welfare Plans	\$ 36,151,970	\$ -	\$ -	\$ -	
		0.00%	0.00%	0.00%	
5. Total Bargaining Unit Compensation Add Items 1 through 4 to equal 5	\$ 328,822,283	\$ 22,550,923	\$ 8,764,319	\$ 281,837	
		6.86%	2.49%	0.08%	
6. Total Number of Bargaining Unit Employees (Use FTEs if appropriate)	2,311.00				
7. Total Compensation Average Cost per Bargaining Unit Employee	\$ 142,286	\$ 9,506	\$ 3,695	\$ 119	
		6.68%	2.43%	0.08%	

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A. Proposed Change in Compensation (Continued)

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

6.98% equivalent ongoing salary increase across the three-year projections, except for adult education which received a 5% ongoing salary increase.

9. Were any additional steps, columns, or ranges added to the salary schedules? (If yes, please explain.)

No

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

11. Does this bargaining unit have a negotiated cap for Health and Welfare benefits?

Yes No

If yes, please describe the cap amount.

B. Proposed negotiated changes in noncompensation items (i.e., class size adjustments, staff development days, teacher prep time, classified staffing ratios, etc.)

Unit negotiated an estimated 31.25 FTE to support class size reduction at six school sites with an unduplicated percentage higher than 78%. Also, an additional 28.0 FTE to support new staffing ratios for special education classrooms.

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

Unit negotiated additional 2.0 FTE Nurses.

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

If the 2024-25 State Budget COLA is funded at a level less than 0.5%, and no augmentation is provided to offset the loss of revenue, both parties agree to revisit the potential impact on the multiyear financial health of the district and examine potential cost saving measures. If the enacted California 2024-25 State Budget COLA is funded at a level in excess of 1.5%, or there is an augmentation to the COLA resulting in an increase of revenues beyond the 1.5%, the district and Association agree to examine potential enhancements to the salary schedule for Year 1 or Year 2.

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

If an immediate supervisor needs additional time to hold a hearing on a grievance, and asks for an extension by the sixth day, a reasonable and mutually agreed upon extension will be granted.

F. Source of Funding for Proposed Agreement:

1. Current Year

Fund balance, restricted and unrestricted funds.

2. If this is a single year agreement, how will the ongoing cost of the proposed agreement be funded in subsequent years?

N/A

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

The district has a robust and healthy ending fund balance. Restricted and unrestricted funds will cover the cost of the agreement across all three years. The district expects to deficit spend from its ending fund balance to cover the cost of the settlement. The deficit spending is manageable even beyond the three year projections. The district will monitor its deficit spending in future years and make adjustments as needed to maintain a healthy ending fund balance.

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G. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET

Unrestricted General Fund
Bargaining Unit: San Juan Teachers Association (SJTA)

Object Code	Column 1	Column 2	Column 3	Column 4
	Latest Board-Approved Budget Before Settlement (24/25 MYP from 2nd interim)	Adjustments as a Result of Settlement (compensation)	Other Revisions (agreement support and/or other unit agreement) Explain on Page 4i	Total Revised Budget (Columns 1+2+3)
REVENUES				
LCFF Revenue 8010-8099	\$ 476,506,195		\$ -	\$ 476,506,195
Federal Revenue 8100-8299			\$ -	\$ -
Other State Revenue 8300-8599	\$ 10,815,203		\$ -	\$ 10,815,203
Other Local Revenue 8600-8799	\$ 3,936,781		\$ -	\$ 3,936,781
TOTAL REVENUES	\$ 491,258,179		\$ -	\$ 491,258,179
EXPENDITURES				
Certificated Salaries 1000-1999	\$ 194,856,830	\$ 10,721,594		\$ 205,578,424
Classified Salaries 2000-2999	\$ 55,520,060			\$ 55,520,060
Employee Benefits 3000-3999	\$ 114,750,349	\$ 2,743,573		\$ 117,493,922
Books and Supplies 4000-4999	\$ 10,669,878		\$ -	\$ 10,669,878
Services and Other Operating Expenditures 5000-5999	\$ 31,520,664		\$ -	\$ 31,520,664
Capital Outlay 6000-6999	\$ 2,940,447		\$ -	\$ 2,940,447
Other Outgo (excluding Indirect Costs) 7100-7299	\$ 1,937,889		\$ -	\$ 1,937,889
Transfers of Indirect Costs 7400-7499				
Transfers of Indirect Costs 7300-7399	\$ (10,236,924)		\$ -	\$ (10,236,924)
TOTAL EXPENDITURES	\$ 401,959,193	\$ 13,465,167	\$ -	\$ 415,424,360
OTHER FINANCING SOURCES/USES				
Transfers In and Other Sources 8900-8979	\$ -	\$ -	\$ -	\$ -
Transfers Out and Other Uses 7600-7699	\$ -	\$ -	\$ -	\$ -
Contributions 8980-8999	\$ (72,782,178)	\$ (7,213,736)	\$ -	\$ (79,995,914)
OPERATING SURPLUS (DEFICIT)*	\$ 16,516,808	\$ (20,678,903)	\$ -	\$ (4,162,095)
BEGINNING FUND BALANCE	9791	\$ 153,133,294		\$ 153,133,294
Audit Adjustments/Other Restatements 9793/9795				\$ -
ENDING FUND BALANCE	\$ 169,650,102	\$ (20,678,903)	\$ -	\$ 148,971,199
COMPONENTS OF ENDING FUND BALANCE:				
Nonspendable 9711-9719	\$ 289,931	\$ -	\$ -	\$ 289,931
Restricted 9740				
Committed 9750-9760	\$ 34,849,051	\$ -	\$ -	\$ 34,849,051
Assigned 9780	\$ 19,621,239	\$ (4,062,500)	\$ -	\$ 15,558,739
Reserve for Economic Uncertainties 9789	\$ 13,196,865	\$ 439,530	\$ -	\$ 13,636,395
Unassigned/Unappropriated Amount 9790	\$ 101,693,016	\$ (17,055,933)	\$ -	\$ 84,637,083

*Net Increase (Decrease) in Fund Balance

NOTE: 9790 amounts in Columns 1 and 4 must be positive

San Juan Unified School District
Public Disclosure of Proposed Collective Bargaining Agreement

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G. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET

Restricted General Fund
Bargaining Unit: San Juan Teachers Association (SJTA)

Object Code	Column 1	Column 2	Column 3	Column 4
	Latest Board-Approved Budget Before Settlement (24/25 MYP from 2nd interim)	Adjustments as a Result of Settlement (compensation)	Other Revisions (agreement support and/or other unit agreement) Explain on Page 4i	Total Revised Budget (Columns 1+2+3)
REVENUES				
LCFF Revenue	8010-8099	\$ 2,490,061	\$ -	\$ 2,490,061
Federal Revenue	8100-8299	\$ 46,491,401	\$ -	\$ 46,491,401
Other State Revenue	8300-8599	\$ 99,178,030	\$ -	\$ 99,178,030
Other Local Revenue	8600-8799	\$ 7,256,078	\$ -	\$ 7,256,078
TOTAL REVENUES		\$ 155,415,570	\$ -	\$ 155,415,570
EXPENDITURES				
Certificated Salaries	1000-1999	\$ 67,787,393	\$ 6,777,113	\$ 74,564,506
Classified Salaries	2000-2999	\$ 53,918,574	\$ -	\$ 53,918,574
Employee Benefits	3000-3999	\$ 87,006,336	\$ 1,734,211	\$ 88,740,547
Books and Supplies	4000-4999	\$ 14,227,562	\$ -	\$ 14,227,562
Services and Other Operating Expenditures	5000-5999	\$ 20,349,696	\$ -	\$ 20,349,696
Capital Outlay	6000-6999	\$ 353,300	\$ -	\$ 353,300
Other Outgo (excluding Indirect Costs)	7100-7299	\$ 117,031	\$ -	\$ 117,031
	7400-7499			
Transfers of Indirect Costs	7300-7399	\$ 8,124,151	\$ -	\$ 8,124,151
TOTAL EXPENDITURES		\$ 251,884,043	\$ 8,511,324	\$ 260,395,367
OTHER FINANCING SOURCES/USES				
Transfers In and Other Sources	8900-8979	\$ -	\$ -	\$ -
Transfers Out and Other Uses	7600-7699	\$ 6,000,000	\$ -	\$ 6,000,000
Contributions	8980-8999	\$ 72,782,178	\$ 7,213,736	\$ 79,995,914
OPERATING SURPLUS (DEFICIT)*		\$ (29,686,295)	\$ (1,297,588)	\$ (30,983,883)
BEGINNING FUND BALANCE	9791	\$ 127,903,225		\$ 127,903,225
Audit Adjustments/Other Restatements	9793/9795	\$ -		\$ -
ENDING FUND BALANCE		\$ 98,216,930	\$ (1,297,588)	\$ 96,919,342
COMPONENTS OF ENDING FUND BALANCE:				
Nonspendable	9711-9719	\$ -	\$ -	\$ -
Restricted	9740	\$ 98,216,930	\$ (1,297,588)	\$ 96,919,342
Committed	9750-9760			
Assigned Amounts	9780			
Reserve for Economic Uncertainties	9789		\$ -	\$ -
Unassigned/Unappropriated Amount	9790	\$ -	\$ -	\$ -

*Net Increase (Decrease) in Fund Balance

NOTE: 9790 amounts in Columns 1 and 4 must be positive

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G. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET

Combined General Fund
Bargaining Unit: San Juan Teachers Association (SJTA)

Object Code	Column 1	Column 2	Column 3	Column 4
	Latest Board-Approved Budget Before Settlement (24/25 MYP from 2nd interim)	Adjustments as a Result of Settlement (compensation)	Other Revisions (agreement support and/or other unit agreement) Explain on Page 4i	Total Revised Budget (Columns 1+2+3)
REVENUES				
LCFF Revenue	8010-8099	\$ 478,996,256	\$ -	\$ 478,996,256
Federal Revenue	8100-8299	\$ 46,491,401	\$ -	\$ 46,491,401
Other State Revenue	8300-8599	\$ 109,993,233	\$ -	\$ 109,993,233
Other Local Revenue	8600-8799	\$ 11,192,859	\$ -	\$ 11,192,859
TOTAL REVENUES		\$ 646,673,749	\$ -	\$ 646,673,749
EXPENDITURES				
Certificated Salaries	1000-1999	\$ 262,644,223	\$ 17,498,707	\$ 280,142,930
Classified Salaries	2000-2999	\$ 109,438,634	\$ -	\$ 109,438,634
Employee Benefits	3000-3999	\$ 201,756,685	\$ 4,477,784	\$ 206,234,469
Books and Supplies	4000-4999	\$ 24,897,440	\$ -	\$ 24,897,440
Services and Other Operating Expenditures	5000-5999	\$ 51,870,360	\$ -	\$ 51,870,360
Capital Outlay	6000-6999	\$ 3,293,747	\$ -	\$ 3,293,747
Other Outgo (excluding Indirect Costs)	7100-7299	\$ 2,054,920	\$ -	\$ 2,054,920
	7400-7499			
Transfers of Indirect Costs	7300-7399	\$ (2,112,773)	\$ -	\$ (2,112,773)
TOTAL EXPENDITURES		\$ 653,843,236	\$ 21,976,491	\$ 675,819,727
OTHER FINANCING SOURCES/USES				
Transfer In and Other Sources	8900-8979	\$ -	\$ -	\$ -
Transfers Out and Other Uses	7600-7699	\$ 6,000,000	\$ -	\$ 6,000,000
Contributions	8980-8999	\$ -	\$ -	\$ -
OPERATING SURPLUS (DEFICIT)*		\$ (13,169,487)	\$ (21,976,491)	\$ (35,145,978)
BEGINNING FUND BALANCE	9791	\$ 281,036,519		\$ 281,036,519
Audit Adjustments/Other Restatements	9793/9795	\$ -		\$ -
ENDING FUND BALANCE		\$ 267,867,032	\$ (21,976,491)	\$ 245,890,541
COMPONENTS OF ENDING FUND BALANCE:				
Nonspendable	9711-9719	\$ 289,931	\$ -	\$ 289,931
Restricted	9740	\$ 98,216,930	\$ (1,297,588)	\$ 96,919,342
Committed	9750-9760	\$ 34,849,051	\$ -	\$ 34,849,051
Assigned	9780	\$ 19,621,239	\$ (4,062,500)	\$ 15,558,739
Reserve for Economic Uncertainties	9789	\$ 13,196,865	\$ 439,530	\$ 13,636,395
Unassigned/Unappropriated Amount	9790	\$ 101,693,016	\$ (17,055,933)	\$ 84,637,083

*Net Increase (Decrease) in Fund Balance

NOTE: 9790 amounts in Columns 1 and 4 must be positive

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G. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET

Fund 11 - Adult Education Fund

Bargaining Unit: San Juan Teachers Association (SJTA)

Object Code	Column 1	Column 2	Column 3	Column 4
	Latest Board-Approved Budget Before Settlement (24/25 MYP from 2nd interim)	Adjustments as a Result of Settlement (compensation)	Other Revisions (agreement support and/or other unit agreement) Explain on Page 4i	Total Revised Budget (Columns 1+2+3)
REVENUES				
Federal Revenue	8100-8299	\$ 437,566	\$ -	\$ 437,566
Other State Revenue	8300-8599	\$ 3,859,018	\$ -	\$ 3,859,018
Other Local Revenue	8600-8799	\$ 135,820	\$ -	\$ 135,820
TOTAL REVENUES		\$ 4,432,404	\$ -	\$ 4,432,404
EXPENDITURES				
Certificated Salaries	1000-1999	\$ 1,379,598	\$ 37,093	\$ 1,416,691
Classified Salaries	2000-2999	\$ 515,111	\$ -	\$ 515,111
Employee Benefits	3000-3999	\$ 968,235	\$ 9,492	\$ 977,727
Books and Supplies	4000-4999	\$ 98,724	\$ -	\$ 98,724
Services and Other Operating Expenditures	5000-5999	\$ 1,367,704	\$ -	\$ 1,367,704
Capital Outlay	6000-6999	\$ -	\$ -	\$ -
Other Outgo (excluding Indirect Costs)	7100-7299	\$ -	\$ -	\$ -
	7400-7499			
Transfers of Indirect Costs	7300-7399	\$ 94,761	\$ -	\$ 94,761
TOTAL EXPENDITURES		\$ 4,424,133	\$ 46,585	\$ 4,470,718
OTHER FINANCING SOURCES/USES				
Transfers In and Other Sources	8900-8979	\$ -	\$ -	\$ -
Transfers Out and Other Uses	7600-7699	\$ 169,347	\$ -	\$ 169,347
OPERATING SURPLUS (DEFICIT)*		\$ (161,076)	\$ (46,585)	\$ (207,661)
BEGINNING FUND BALANCE	9791	\$ 1,789,814		\$ 1,789,814
Audit Adjustments/Other Restatements	9793/9795	\$ -		\$ -
ENDING FUND BALANCE		\$ 1,628,738	\$ (46,585)	\$ 1,582,153
COMPONENTS OF ENDING FUND BALANCE:				
Nonspendable	9711-9719	\$ -	\$ -	\$ -
Restricted	9740	\$ 1,628,738	\$ (46,585)	\$ 1,582,153
Committed	9750-9760	\$ -	\$ -	\$ -
Assigned	9780	\$ -	\$ -	\$ -
Reserve for Economic Uncertainties	9789	\$ -	\$ -	\$ -
Unassigned/Unappropriated Amount	9790	\$ -	\$ -	\$ -

*Net Increase (Decrease) in Fund Balance

NOTE: 9790 amounts in Columns 1 and 4 must be positive

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G. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET

Fund 12 - Child Development Fund
Bargaining Unit: San Juan Teachers Association (SJTA)

Object Code	Column 1	Column 2	Column 3	Column 4
	Latest Board-Approved Budget Before Settlement (24/25 MYP from 2nd interim)	Adjustments as a Result of Settlement (compensation)	Other Revisions (agreement support and/or other unit agreement) Explain on Page 4i	Total Revised Budget (Columns 1+2+3)
REVENUES				
Federal Revenue	8100-8299	\$ 13,774,592	\$ -	\$ 13,774,592
Other State Revenue	8300-8599	\$ 6,327,934	\$ -	\$ 6,327,934
Other Local Revenue	8600-8799	\$ 5,951,930	\$ -	\$ 5,951,930
TOTAL REVENUES		\$ 26,054,456	\$ -	\$ 26,054,456
EXPENDITURES				
Certificated Salaries	1000-1999	\$ 9,956,529	\$ 420,297	\$ 10,376,826
Classified Salaries	2000-2999	\$ 5,369,082	\$ -	\$ 5,369,082
Employee Benefits	3000-3999	\$ 8,922,429	\$ 107,551	\$ 9,029,980
Books and Supplies	4000-4999	\$ 2,477,133	\$ -	\$ 2,477,133
Services and Other Operating Expenditures	5000-5999	\$ 588,487	\$ -	\$ 588,487
Capital Outlay	6000-6999	\$ -	\$ -	\$ -
Other Outgo (excluding Indirect Costs)	7100-7299	\$ -	\$ -	\$ -
	7400-7499			
Transfers of Indirect Costs	7300-7399	\$ 1,320,679	\$ -	\$ 1,320,679
TOTAL EXPENDITURES		\$ 28,634,339	\$ 527,848	\$ 29,162,187
OTHER FINANCING SOURCES/USES				
Transfers In and Other Sources	8900-8979	\$ 4,000,000	\$ -	\$ 4,000,000
Transfers Out and Other Uses	7600-7699	\$ -	\$ -	\$ -
OPERATING SURPLUS (DEFICIT)*		\$ 1,420,117	\$ (527,848)	\$ 892,269
BEGINNING FUND BALANCE	9791	\$ 7,483,075		\$ 7,483,075
Audit Adjustments/Other Restatements	9793/9795	\$ -		\$ -
ENDING FUND BALANCE		\$ 8,903,192	\$ (527,848)	\$ 8,375,344
COMPONENTS OF ENDING FUND BALANCE:				
Nonspendable	9711-9719	\$ -	\$ -	\$ -
Restricted	9740	\$ 8,903,192	\$ (527,848)	\$ 8,375,344
Committed	9750-9760	\$ -	\$ -	\$ -
Assigned	9780	\$ -	\$ -	\$ -
Reserve for Economic Uncertainties	9789	\$ -	\$ -	\$ -
Unassigned/Unappropriated Amount	9790	\$ -	\$ -	\$ -

*Net Increase (Decrease) in Fund Balance

NOTE: 9790 amounts in Columns 1 and 4 must be positive

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H. IMPACT OF PROPOSED AGREEMENT ON SUBSEQUENT YEARS

Unrestricted General Fund MYP
Bargaining Unit: San Juan Teachers Association (SJTA)

Object Code	2024-25	2025-26	2026-27	
	Total Revised Budget After Settlement	First Subsequent Year After Settlement	Second Subsequent Year After Settlement	
REVENUES				
LCFF Revenue	8010-8099	\$ 476,506,195	\$ 491,791,272	\$ 507,009,144
Federal Revenue	8100-8299	\$ -	\$ -	\$ -
Other State Revenue	8300-8599	\$ 10,815,203	\$ 11,317,593	\$ 11,843,320
Other Local Revenue	8600-8799	\$ 3,936,781	\$ 3,936,781	\$ 3,936,781
TOTAL REVENUES		\$ 491,258,179	\$ 507,045,646	\$ 522,789,245
EXPENDITURES				
Certificated Salaries	1000-1999	\$ 205,578,424	\$ 212,484,336	\$ 214,396,695
Classified Salaries	2000-2999	\$ 55,520,060	\$ 55,874,141	\$ 56,377,008
Employee Benefits	3000-3999	\$ 117,493,922	\$ 121,747,912	\$ 122,843,643
Books and Supplies	4000-4999	\$ 10,669,878	\$ 10,877,967	\$ 11,173,848
Services and Other Operating Expenditures	5000-5999	\$ 31,520,664	\$ 32,577,012	\$ 33,463,107
Capital Outlay	6000-6999	\$ 2,940,447	\$ 2,629,335	\$ 2,700,853
Other Outgo (excluding Indirect Costs)	7100-7299	\$ 1,937,889	\$ 1,980,428	\$ 2,034,296
	7400-7499			
Transfers of Indirect Costs	7300-7399	\$ (10,236,924)	\$ (10,044,416)	\$ (10,000,000)
Other Adjustments				\$ -
TOTAL EXPENDITURES		\$ 415,424,360	\$ 428,126,715	\$ 432,989,449
OTHER FINANCING SOURCES/USES				
Transfers In and Other Sources	8900-8979	\$ -	\$ -	\$ -
Transfers Out and Other Uses	7600-7699	\$ -	\$ -	\$ -
Contributions	8980-8999	\$ (79,995,914)	\$ (86,532,005)	\$ (92,379,028)
OPERATING SURPLUS (DEFICIT)*		\$ (4,162,095)	\$ (7,613,074)	\$ (2,579,232)
BEGINNING FUND BALANCE	9791	\$ 153,133,294	\$ 148,971,199	\$ 141,358,125
Audit Adjustments/Other Restatements	9793/9795	\$ -		
ENDING FUND BALANCE		\$ 148,971,199	\$ 141,358,125	\$ 138,778,893
COMPONENTS OF ENDING FUND BALANCE:				
Nonspendable	9711-9719	\$ 289,931	\$ 289,931	\$ 289,931
Restricted	9740			
Committed	9750-9760	\$ 34,849,051	\$ 27,239,348	\$ 18,000,000
Assigned	9780	\$ 15,558,739	\$ 26,607,143	\$ 35,915,887
Reserve for Economic Uncertainties	9789	\$ 13,636,395	\$ 13,103,753	\$ 13,253,326
Unassigned/Unappropriated Amount	9790	\$ 84,637,083	\$ 74,117,951	\$ 71,319,749

*Net Increase (Decrease) in Fund Balance

NOTE: 9790 amounts must be positive

San Juan Unified School District
Public Disclosure of Proposed Collective Bargaining Agreement

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H. IMPACT OF PROPOSED AGREEMENT ON SUBSEQUENT YEARS

Restricted General Fund MYP
Bargaining Unit: San Juan Teachers Association (SJTA)

Object Code	2024-25	2025-26	2026-27
	Total Revised Budget After Settlement	First Subsequent Year After Settlement	Second Subsequent Year After Settlement
REVENUES			
LCFF Revenue	8010-8099	\$ 2,490,061	\$ 2,490,061
Federal Revenue	8100-8299	\$ 46,491,401	\$ 35,349,352
Other State Revenue	8300-8599	\$ 99,178,030	\$ 99,354,789
Other Local Revenue	8600-8799	\$ 7,256,078	\$ 7,337,816
TOTAL REVENUES		\$ 155,415,570	\$ 144,532,018
EXPENDITURES			
Certificated Salaries	1000-1999	\$ 74,564,506	\$ 64,029,693
Classified Salaries	2000-2999	\$ 53,918,574	\$ 39,382,163
Employee Benefits	3000-3999	\$ 88,740,547	\$ 76,002,707
Books and Supplies	4000-4999	\$ 14,227,562	\$ 18,245,625
Services and Other Operating Expenditures	5000-5999	\$ 20,349,696	\$ 15,097,523
Capital Outlay	6000-6999	\$ 353,300	\$ 273,000
Other Outgo (excluding Indirect Costs)	7100-7299	\$ 117,031	\$ 117,031
	7400-7499		
Transfers of Indirect Costs	7300-7399	\$ 8,124,151	\$ 7,913,171
Other Adjustments		\$ -	\$ -
TOTAL EXPENDITURES		\$ 260,395,367	\$ 221,060,913
OTHER FINANCING SOURCES/USES			
Transfers In and Other Sources	8900-8979	\$ -	\$ -
Transfers Out and Other Uses	7600-7699	\$ 6,000,000	\$ 6,000,000
Contributions	8980-8999	\$ 79,995,914	\$ 86,532,005
OPERATING SURPLUS (DEFICIT)*		\$ (30,983,883)	\$ 4,003,110
BEGINNING FUND BALANCE	9791	\$ 127,903,225	\$ 96,919,342
Audit Adjustments/Other Restatements	9793/9795	\$ -	
ENDING FUND BALANCE		\$ 96,919,342	\$ 100,922,452
COMPONENTS OF ENDING FUND BALANCE:			
Nonspendable	9711-9719	\$ -	\$ -
Restricted	9740	\$ 96,919,342	\$ 100,922,452
Committed	9750-9760		
Assigned	9780		
Reserve for Economic Uncertainties	9789	\$ -	\$ -
Unassigned/Unappropriated Amount	9790	\$ -	\$ 0

*Net Increase (Decrease) in Fund Balance

NOTE: 9790 amounts must be positive

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Public Disclosure of Proposed Collective Bargaining Agreement

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H. IMPACT OF PROPOSED AGREEMENT ON SUBSEQUENT YEARS

Combined General Fund MYP
Bargaining Unit: San Juan Teachers Association (SJTA)

Object Code	2024-25	2025-26	2026-27	
	Total Revised Budget After Settlement	First Subsequent Year After Settlement	Second Subsequent Year After Settlement	
REVENUES				
LCFF Revenue	8010-8099	\$ 478,996,256	\$ 494,281,333	\$ 509,499,205
Federal Revenue	8100-8299	\$ 46,491,401	\$ 35,349,352	\$ 35,349,352
Other State Revenue	8300-8599	\$ 109,993,233	\$ 110,672,382	\$ 111,198,109
Other Local Revenue	8600-8799	\$ 11,192,859	\$ 11,274,597	\$ 11,274,597
TOTAL REVENUES		\$ 646,673,749	\$ 651,577,664	\$ 667,321,263
EXPENDITURES				
Certificated Salaries	1000-1999	\$ 280,142,930	\$ 276,514,029	\$ 279,002,655
Classified Salaries	2000-2999	\$ 109,438,634	\$ 95,256,304	\$ 96,113,611
Employee Benefits	3000-3999	\$ 206,234,469	\$ 197,750,619	\$ 199,530,375
Books and Supplies	4000-4999	\$ 24,897,440	\$ 29,123,592	\$ 29,915,754
Services and Other Operating Expenditures	5000-5999	\$ 51,870,360	\$ 47,674,535	\$ 48,971,282
Capital Outlay	6000-6999	\$ 3,293,747	\$ 2,902,335	\$ 2,981,279
Other Outgo (excluding Indirect Costs)	7100-7299 7400-7499	\$ 2,054,920	\$ 2,097,459	\$ 2,151,327
Transfers of Indirect Costs	7300-7399	\$ (2,112,773)	\$ (2,131,245)	\$ (2,000,000)
Other Adjustments			\$ -	\$ -
TOTAL EXPENDITURES		\$ 675,819,727	\$ 649,187,628	\$ 656,666,282
OTHER FINANCING SOURCES/USES				
Transfers In and Other Sources	8900-8979	\$ -	\$ -	\$ -
Transfers Out and Other Uses	7600-7699	\$ 6,000,000	\$ 6,000,000	\$ 6,000,000
Contributions	8980-8999	\$ -	\$ -	\$ -
OPERATING SURPLUS (DEFICIT)*		\$ (35,145,978)	\$ (3,609,964)	\$ 4,654,981
BEGINNING FUND BALANCE	9791	\$ 281,036,519	\$ 245,890,541	\$ 242,280,577
Audit Adjustments/Other Restatements	9793/9795	\$ -		
ENDING FUND BALANCE		\$ 245,890,541	\$ 242,280,577	\$ 246,935,558
COMPONENTS OF ENDING FUND BALANCE:				
Nonspendable	9711-9719	\$ 289,931	\$ 289,931	\$ 289,931
Restricted	9740	\$ 96,919,342	\$ 100,922,452	\$ 108,156,665
Committed	9750-9760	\$ 34,849,051	\$ 27,239,348	\$ 18,000,000
Assigned	9780	\$ 15,558,739	\$ 26,607,143	\$ 35,915,887
Reserve for Economic Uncertainties	9789	\$ 13,636,395	\$ 13,103,753	\$ 13,253,326
Unassigned/Unappropriated Amount	9790	\$ 84,637,083	\$ 74,117,951	\$ 71,319,749

*Net Increase (Decrease) in Fund Balance

NOTE: 9790 amounts must be positive

San Juan Unified School District
Public Disclosure of Proposed Collective Bargaining Agreement

Page 6

I. IMPACT OF PROPOSED AGREEMENT ON UNRESTRICTED RESERVES

1. State Reserve Standard

		2024-25	2025-26	2026-27
a.	Total Expenditures, Transfers Out, and Uses (Including Cost of Proposed Agreement)	\$ 681,819,727	\$ 655,187,628	\$ 662,666,282
b.	Less: Special Education Pass-Through Funds		\$ -	\$ -
c.	Net Expenditures, Transfers Out, and Uses	\$ 681,819,727	\$ 655,187,628	\$ 662,666,282
d.	State Standard Minimum Reserve Percentage for this District Enter percentage	2.00%	2.00%	2.00%
e.	State Standard Minimum Reserve Amount for this District (For districts with less than 1,001 ADA, this is the greater of Line a, times Line b, or \$50,000)	\$ 13,636,395	\$ 13,103,753	\$ 13,253,326

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

a.	General Fund Budgeted Unrestricted Designated for Economic Uncertainties (9789)	\$ 13,636,395	\$ 13,103,753	\$ 13,253,326
b.	General Fund Budgeted Unrestricted Unassigned/Unappropriated Amount (9790)	\$ 84,637,083	\$ 74,117,951	\$ 71,319,749
c.	Special Reserve Fund (Fund 17) Budgeted Designated for Economic Uncertainties (9789)	\$ -	\$ -	\$ -
d.	Special Reserve Fund (Fund 17) Budgeted Unassigned/Unappropriated Amount (9790)	\$ -	\$ -	\$ -
e.	Total Available Reserves	\$ 98,273,478	\$ 87,221,704	\$ 84,573,074
f.	Reserve for Economic Uncertainties Percentage	14.41%	13.31%	12.76%

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

2024-25	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
2025-26	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
2026-27	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>

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

San Juan Unified School District
Public Disclosure of Proposed Collective Bargaining Agreement

Page 7

I. IMPACT OF PROPOSED AGREEMENT ON UNRESTRICTED RESERVES (CONTINUED)

- 5. Does the Total Compensation Increase/(Decrease) on Page 1, Section A, #5 agree with the Total Increase/(Decrease) for all funds as a result of the settlement(s)? Please explain any variance.**

Total Compensation Increase/(Decrease) on Page 1, Section A, #5	\$ 22,550,923
General Fund balance Increase/(Decrease), Page 4c, Column 2	\$ (21,976,491)
Adult Education Fund balance Increase/(Decrease), Page 4d, Column 2	\$ (46,585)
Child Development Fund balance Increase/(Decrease), Page 4e, Column 2	\$ (527,848)
Cafeteria Fund balance Increase/(Decrease), Page 4f, Column 2	\$ -
Other Fund balance Increase/(Decrease), Page 4g, Column 2	\$ -
Other Fund balance Increase/(Decrease), Page 4h, Column 2	\$ -
Total all fund balances Increase/(Decrease) as a result of the settlement(s)	\$ (22,550,924)

Variance \$ (1)

Variance Explanation:

Variance is caused by rounding.

- 6. Will this agreement create or increase deficit financing in the current or subsequent years?**

"Deficit Financing" is defined to exist when a fund's expenditures and other financing uses exceed its revenues and other financing sources in a given year. If a deficit is shown below, provide an explanation and any deficit reduction plan, as necessary.

<u>General Fund Combined</u>	<u>Surplus/ (Deficit)</u>	<u>(Deficit) %</u>	<u>Deficit primarily due to:</u>
Current FY Surplus/(Deficit) before settlement(s)?	\$ (13,169,487)	(2.0%)	deficit due to restricted funds spending
Current FY Surplus/(Deficit) after settlement(s)?	\$ (35,145,978)	(5.2%)	the above plus the settlement
1st Subsequent FY Surplus/(Deficit) after settlement(s)?	\$ (3,609,964)	(0.6%)	the settlement
2nd Subsequent FY Surplus/(Deficit) after settlement(s)?	\$ 4,654,981	0.7%	

Deficit Reduction Plan (as necessary):

- 7. Were "Other Adjustments" amount(s) entered in the multiyear projections (pages 5a and 5b) for 1st and 2nd Subsequent FY?**

"Other Adjustments" could indicate that a budget reduction plan was/is being developed to address deficit spending, and to rebuild reserves. Any amount shown below must have an explanation. If additional space is needed, attach a separate sheet, or use page 8a.

<u>MYP</u>	<u>Amount</u>	<u>"Other Adjustments" Explanation</u>
1st Subsequent FY Unrestricted, Page 5a	\$ -	
1st Subsequent FY Restricted, Page 5b	\$ -	
2nd Subsequent FY Unrestricted, Page 5a	\$ -	
2nd Subsequent FY Restricted, Page 5b	\$ -	

San Juan Unified School District
Public Disclosure of Proposed Collective Bargaining Agreement

Page 8

J. CERTIFICATION NO. 1: CERTIFICATION OF THE DISTRICT'S ABILITY TO MEET THE COSTS OF THE COLLECTIVE BARGAINING AGREEMENT

This certification page must be signed by the district's Superintendent and Chief Business Official at the time of public disclosure and is intended to assist the district's Governing Board in determining whether the district can meet the costs incurred under the tentative Collective Bargaining Agreement in the current and subsequent years. The absence of a certification signature or if "I am unable to certify" is checked should serve as a "red flag" to the district's Governing Board.

In accordance with the requirements of Government Code Sections 3540.2 and 3547.5, the Superintendent and Chief Business Official of the San Juan Unified School District, hereby certify that the District can meet the costs incurred under this Collective Bargaining Agreement during the term of the agreement from 7/1/2024 to 6/30/2026.

Board Actions

The board actions necessary to meet the cost of the agreement in each year of its term are as follows:

Current Year

Budget Adjustment Categories:

Revenues/Transfers In and Other Sources/Contributions
Expenditures/Transfers Out and Other Uses
Ending Balance(s) Increase/(Decrease)

Budget Adjustment Increase/(Decrease)
\$ -
\$ 22,550,924
<u>\$ (22,550,924)</u>

Subsequent Years

Budget Adjustment Categories:

Revenues/Transfers In and Other Sources/Contributions
Expenditures/Transfers Out and Other Uses
Ending Balance(s) Increase/(Decrease)

Budget Adjustment Increase/(Decrease)
\$ -
\$ 9,046,157
<u>\$ (9,046,157)</u>

Budget Revisions

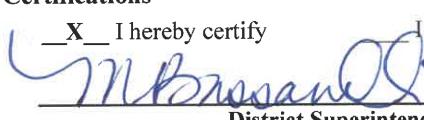
If the district does not adopt and submit within 45 days all of the revisions to its budget needed in the current year to meet the costs of the agreement at the time of the approval of the proposed collective bargaining agreement, the county superintendent of schools is required to issue a qualified or negative certification for the district on its next interim report.

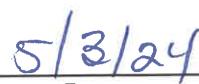
Assumptions

See attached page for a list of the assumptions upon which this certification is based.

Certifications

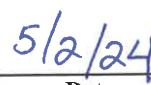
I hereby certify I am unable to certify


District Superintendent
(Signature)


Date

I hereby certify I am unable to certify


Chief Business Official
(Signature)


Date

Special Note: The Sacramento County Office of Education may request additional information, as necessary, to review the district's compliance with requirements.

San Juan Unified School District
Public Disclosure of Proposed Collective Bargaining Agreement

Page 8a

Assumptions and Explanations (enter or attach documentation)

The assumptions upon which this certification is made are as follows:

Used assumptions included in our second interim and the COLAs in the Governor's January 2024 budget proposal.

Assumed 6.98% equivalent increase for all SJTA. Other units not included since they have not yet settled.

Assumed our typical step and column of .9% for both certificated and classified and H&W historical rate of 4.32% growth.

Concerns regarding affordability of agreement in subsequent years (if any):

Public Disclosure of Proposed Collective Bargaining Agreement

Page 9

K. CERTIFICATION NO. 2

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

The information provided in this document summarizes the financial implications of the proposed agreement and is submitted to the Governing Board for public disclosure of the major provisions of the agreement (as provided in the "Public Disclosure of Proposed Collective Bargaining Agreement") in accordance with the requirements of AB 1200 and Government Code Sections 3540.2(a) and 3547.5.

San Juan Unified School District

District Name

District Superintendent
(Signature)

Joel Ryan

Contact Person

Date

916-971-7248

Phone

After public disclosure of the major provisions contained in this summary, the Governing Board at its meeting on May 14, 2024, took action to approve the proposed agreement with the San Juan Teachers Association.

President (or Clerk), Governing Board
(Signature)

Date

Special Note: The Sacramento County Office of Education may request additional information, as necessary, to review the district's compliance with requirements.

**SAN JUAN UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION**

AGENDA ITEM: I-8

MEETING DATE: 05/14/2024

SUBJECT: Presentation of Proposal from Teamsters Union Local 150 Transportation Unit to SJUSD for Successor Contract 2024-2027

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

DEPARTMENT: Labor Relations and Government Affairs

ACTION REQUESTED:

The bargaining interests of the Teamsters Local 150 are presented for discussion pursuant to Government Code section 3540 et seq. and district Board Policy 4143.1.

The public is invited to comment at the board meeting.

RATIONALE/BACKGROUND:

The board and representatives of Teamsters Local 150 have agreed to engage in an interest-based, collaborative approach to negotiations. As part of the model of negotiations, the parties identify their respective interests for public sunshining.

ATTACHMENTS:

A: Proposal from Teamsters Union Local 150 Transportation Unit to the SJUSD for Successor Contract 2024-2027

PREVIOUS STAFF/BOARD ACTION:

Superintendent's Cabinet: 04/15/2024, 05/06/2024
Board of Education: 04/23/2024

FISCAL IMPACT:

Current Budget: \$ N/A

Additional Budget: \$ N/A

Funding Source: N/A

(Unrestricted Base, Supplemental, other restricted, etc.)

Current Year Only On-going

LCAP/STRATEGIC PLAN:

Goal: N/A Focus: N/A
Action: N/A

Strategic Plan: N/A

PREPARED BY: Daniel Thigpen, Executive Director, Labor Relations and Government Affairs *DT*

APPROVED BY: Melissa Bassanelli, Superintendent of Schools *M.B.*

**Proposal from Teamsters Union Local 150
Transportation Unit to SJUSD
for Successor Contract 2024-2027**

Article 1 - RECOGNITION

...Term of the contract, July 1, 2024, through June 30, 2027, with fair and equitable reopeners.

Article 4 - GRIEVANCE PROCEDURE

...The District must offer employees their Weingarten rights before any interview which could lead to discipline unless the employee signs a waiver. The District will not pressure an employee to sign such waiver.

Article 5 - HOURS AND OVERTIME

...Modify language to protect employees from involuntary adjustment of workday start and finish times.

...Limit the total number of hours an employee can be held for in order to reach their guaranteed hour

...Add language requiring District to place actual route times on the route sheet that will be bid on

...Increase guaranteed hours for bus drivers during the school year.

...Increase summer time guaranteed hours.

...All non-bid driving time must be offered by seniority.

...Increase minimum call in time guarantee to 4 hours.

...Improve and strengthen minimum guaranteed hours for attendants by seniority.

...75% of bus attendants shall have a guarantee of 7 hours.

...improve language for adjusting hourly guarantee upwards.

...Clean up language as needed.

...Improve members rights of refusal.

...Extra work with greater hours must be offered to seniority employees over substitutes.

...Improve sub hours.

...Bidding including summer bids shall be on the clock.

Article 6 - SALARIES

...Fair and equitable increases in wages/salaries including wage/salary, range increases and differentials to keep our wages competitive within the region and not less than received by other bargaining units. If any other bargaining unit receives a greater salary schedule and/or off schedule (bonus) including in their benefits or anything of a monetary value without a corresponding contract change, cost reduction or other event triggering an equivalent savings then Teamsters shall receive the same increase. Increase longevity. Extend the Summer Assistance Program for all eligible bargaining unit employees.

Article 7 - FRINGE BENEFITS

...Provide employee with the minimum basic coverage of an insurance policy such as that offered by American Fidelity or similar policy to cover long term illness and injuries at no cost to employee.

...Provide State Disability Insurance.

...Improve vision coverage benefits to include dependent vision coverage at no additional cost to the employee.

...Improve dental coverage.

Article 8 - HOLIDAYS

...Add additional five (5) floating holidays to the current number of holidays
...Add language specifying that Substitutes are eligible to receive all contractual holidays.

Article 9 - VACATIONS

...Fair and equitable increases in vacation accumulations schedule and improve employee ability to schedule vacation at their option.

Article 10 - LEAVES

...Add one or more day(s) of personal necessity to match the greatest amount of PN time in any of the other bargaining units CBA's and no less than granted by the Ed Code.

...Improve ability to take unpaid leave without discipline including loss of or adjustment of seniority. Include new form of leave to cover circumstances defined by mutual agreement of the District and the Union. Suspensions shall not cause seniority to be adjusted adversely (no double jeopardy).

...Release time shall be reasonably granted to the bargaining unit members on the negotiations team.

...eliminate current sick leave discipline policy for drivers to comply with CHP 82.7 California Code of Regulations Title 13 1214

Article 14-TRAINING

...Improve training time to fit the needs of the bargaining unit. Include field trip training on the clock.

Article 16-Layoff

...Develop severance incentive package during time of layoff.

**SAN JUAN UNIFIED SCHOOL DISTRICT
TENTATIVE BOARD AGENDA ITEMS
2023-2024**

MAY 28

Recognition: National Science Bowl (if applicable) – A	Schnepp
Recognition: Science Olympiad (if applicable) – A	Schnepp
Recognition: Academic Decathlon (if applicable) – A	Schnepp
District K-12 Mathematics Update – R	Slavensky
Expanded Learning Opportunities Program (ELO-P) Update – R	Calvin
Strategic Plan – A [Discussed 05/14/24]	Allen
Intent to Convey Easement at Garfield ES to Carmichael Water District – A	Camarda
Intent to Convey Easement at Schweitzer ES to Carmichael Water District – A	Camarda
District's Proposal with Teamsters for Successor Contract – D	Thigpen
*High School Scholarships – A	Schnepp
*Choices Charter School Scholarship – A	Ginter

JUNE 11

Public Hearing: LCAP – D	Slavensky
Public Hearing: LCAP Choices Charter School – D	Ginter
Public Hearing: Adoption of the 2024-2025 Budget – D	Ryan
Dress Code Policy/Board Policy 5132 Dress and Grooming – D	Schnepp
Encina Name Change – D	Schnepp
Middle School Boundary Adjustments – D	Camarda
Public Hearing: Conveyance of Easement at Garfield to Carmichael Water District – A [Discussed 05/28/24]	Camarda
Public Hearing: Conveyance of Easement at Schweitzer to Carmichael Water District – A [Discussed 05/28/24]	Camarda
District's Proposal with Teamsters for Successor Contract – A [Discussed 05/28/24]	Thigpen
*CIF Superintendent Designation of Representatives 2024-2025 – A	Schnepp
*ECE Program Self-Evaluation for CDE – A	Townsend-Snider

JUNE 25

California School Dashboard Local Indicators – R	Slavensky
LCAP – A [Public Hearing 06/11/24]	Slavensky
Choices Charter School California School Dashboard Local Indicators – R	Ginter
LCAP Choices Charter School – A [Public Hearing 06/11/24]	Ginter
Arts, Music & Instructional Materials Discretionary Block Grant – A	Slavensky
Safety and Safe Schools Update – R	Allen
Adoption of the 2024-2025 Budget – A [Public Hearing 06/11/24]	Ryan
*2023-2024 Actuarial Report (OPEB) – A	Ryan
*Charter School 2022-2023 Audit Reports (AAT, CMP, GIS, GV, OFY, VIE) – A	Ryan
*2024-2025 School Plan for Student Achievement (SPSAs) – A	Calvin
*Dress Code Policy/Board Policy 5132 Dress and Grooming – A [Discussed 06/11/24]	Schnepp
*Encina Name Change – A [Discussed 06/11/24]	Schnepp
*Middle School Boundary Adjustments – A [Discussed 06/11/24]	Camarda
*Head Start/Early Head Start COLA Funding Allocation 2024-2025 – A	Townsend-Snider

D=discussion; A=action; *=consent; R=report; PC=public comment