

Ducor School

23761 Avenue 56 – P.O. Box 249

Ducor, CA 93218

(559) 534-2261

Board of Trustees:

Patricia Hughes, Board President

Mary McGill (Member)

Gabina Becerra (Member)

Amparo Mariscal (Clerk)

Florence Pace (Member)

School Board Meeting/DLAC Meeting

January 12, 2021

Meeting Place: Cafeteria, Room 25/ 26

resolution(s): 2

Open Session 05:30 PM

***Possible board action**

Agenda/Video Conference

Meeting ID: 791 6777 3916

Passcode: 9jrDn6

1. Called to order: Time: _____ pm

___ Board President Patricia Hughes ___ Board Member Florance Pace ___ Board Member Gabina Becerra

___ Board Member Mary McGill ___ Clerk Amparo Mariscal

1.1 Pledge of Allegiance

1.2 Introduction of Visitors:

1.3 Community Input:

2. Regular Business Agenda/Board Action:

2.1 * PUBLIC HEARING: Ed. Code. 54954.3 Opportunity for the public to address legislative body:

Public hearing was open at: _____

Public hearing was closed at: _____

2.2* Resignation: Board Member Trish Hughes resigned her position as a board member due to personal reasons.

Adoption:

Action: Mrs. Hughes ___ Mrs. Mariscal ___ Mrs. McGill ___ Ms. Becerra ___ Mrs. Pace ___

2.3* Board members election of office: Board president and clerk to be elected.

Adoption:

Action: Mrs. Hughes___ Mrs. Mariscal ___ Mrs. McGill ___ Ms. Becerra_____ Mrs. Pace _____

2.4* Review Board Minutes: November 10, 2020 for review and approval

Adoption:

Action: Mrs. Hughes___ Mrs. Mariscal ___ Mrs. McGill ___ Ms. Becerra_____ Mrs. Pace _____

2.5 * Accounts Payable for the month of December 2020 and January 2021.

Adoption:

Action: Mrs. Hughes___ Mrs. Mariscal ___ Mrs. McGill ___ Ms. Becerra_____ Mrs. Pace _____

2.6 * Notification of Board Vacancy: Ducor School has 60 days to make a provisional appointment or to order an election. Reference sheet provided to view step by step procedure.

Adoption:

Action: Mrs. Hughes___ Mrs. Mariscal ___ Mrs. McGill ___ Ms. Becerra_____ Mrs. Pace _____

2.7* Local Control Formula Budget Overview for Parents. Budget overview for parents in place of the LCAP for the 20-21 school year.

Adoption:

Action: Mrs. Hughes___ Mrs. Mariscal ___ Mrs. McGill ___ Ms. Becerra_____ Mrs. Pace _____

2.8 * School Plan for Student Achievement (SPSA): Required under the Comprehensive Support and Improvement (CSI) funding that will meet the Every Student Succeeds Act (ESSA) aligned to the LCAP. Total funding \$170,123.

Adoption:

Action: Mrs. Hughes___ Mrs. Mariscal ___ Mrs. McGill ___ Ms. Becerra_____ Mrs. Pace _____

2.9 * T & T truck and crane service: project to move the blue carport to make room for the kindergarten project. Based on six hours totaling \$4065. General funds from the maintenance category will be used.

Adoption:

Action: Mrs. Hughes___ Mrs. Mariscal ___ Mrs. McGill ___ Ms. Becerra_____ Mrs. Pace _____

2.10 * Jagger Concrete: Concrete will need to be formed and poured to place the carport and existing vehicles. Cost will be \$5969. This also includes the removal of the freezer foundation to be moved as well. General funds from the maintenance category will be used.

3. Informational:

- 3.1 Form 700
- 3.2 No classes January 18 MLK Day
- 3.3 Non-re-election notices March 15
- 3.4 Superintendent contract
- 3.5 Kinder project Funds to be received end of January
- 3.6 LCAP planning
- 3.7 New funding from the state and federal governments
- 3.8 SBAC and ELPAC testing
- 3.9 Student returning to in-person learning
- 3.10 Lunches and fresh fruit continue to be delivered to the homes
- 3.11 DLAC: discussion about ELD program, curriculum, distance learning

4. New Business: Any new business to include or discuss at the next meeting.

4.1.

5. Adjourn to Closed Session: Time: ____ pm

Action: Mrs. Hughes ____ Mrs. Mariscal ____ Mrs. McGill ____ Ms. Becerra ____ Mrs. Pace ____

6. Closed Session: Business

- 6.1. Employee Business (Gov. Code 54957) March 15 Probationary Non-Reelection Date
- 6.2. Superintendent Business

7. Report Out of Closed Session: Time: ____ pm

Action: Mrs. Hughes ____ Mrs. Mariscal ____ Mrs. McGill ____ Ms. Becerra ____ Mrs. Pace ____

8. Adjournment: Time: ____ pm

Action: Mrs. Hughes ____ Mrs. Mariscal ____ Mrs. McGill ____ Mrs. Becerra ____ Mrs. Pace ____

2.2

JANUARY 4, 2021

Mr. Rodriguez

Members of the Ducor District School Board

I, hereby, resign my position as a member of the Ducor District School Board, effective January 4, 2021, due to personal reasons.

I have served on the board for many years and have full confidence my board position will be filled by a resident of the district concerned with the education of the children who attend Ducor School.

Most sincerely,

Patricia Hughes

2.4

Ducor School

23761 Avenue 56 – P.O. Box 249

Ducor, CA 93218

(559) 534-2261

Board of Trustees:

Patricia Hughes, Board President

Mary McGill (Member)

Gabina Becerra (Member)

Amparo Mariscal (Clerk)

Florence Pace (Member)

School Board Meeting/DLAC Meeting

December 15, 2020

Meeting Place: Cafeteria, Room 25/ 26

resolution(s): 2

Open Session 05:30 PM

***Possible board action**

Minutes

Agenda/Video Conference

Meeting ID: 746 4075 2106

Passcode: ap3KHt

1. Called to order: Time: 5:33 pm

 x Board President Patricia Hughes x Board Member Florance Pace x Board Member Gabina Becerra

 x Board Member Mary McGill x Clerk Amparo Mariscal

1.1 Pledge of Allegiance

1.2 Introduction of Visitors: Laura Fielder, Louis Smith, Rachel Nunez, Jeremiah Sosa

1.3 Community Input: Luar Fielder, parent, asked that Ducor School reconsider a regular winter break and not a month break due to High School students attending school and not on break with siblings.

2. Regular Business Agenda/Board Action:

2.1 * PUBLIC HEARING: Ed. Code. 54954.3 Opportunity for the public to address legislative body: NONE

Public hearing was open at: _____

Public hearing was closed at: _____

2.2* Certificates of Appointment in Lieu of Election and Oaths of Office for Board Meetings, ED Code sections 5326 and 5328: Three board members to be sworn in Gabina Becerra, Florence Pace and Patricia Hughes. Each member Sworn in the Oath. Board accepted members

Adoption: Approved

Action: Mrs. Hughes_M__ Mrs. Mariscal __2__ Mrs. McGill __1__ Ms. Becerra__aye____ Mrs. Pace _aye____

2.3 * Annual Organizational Meeting Ed. Code 35143; Authorized Signatures Form, Board Representative to Vote in the 2021 Election of County Office Committee, Certificate of District Clerk Election, Registry of Public Agencies and Government Board Member Information Sheet. Motion to elect Mrs. McGill as the clerk. Motion to elect Mrs. Hughes as the board president. There were no objections.

Adoption: Approved

Action: Mrs. Hughes_M__ Mrs. Mariscal __1__ Mrs. McGill _aye____ Ms. Becerra__aye____ Mrs. Pace __2____

2.4* Review Board Minutes: November 10, 2020 for review and approval. Mrs. McGill asked if the freezer was sold yet. Superintendent Rodriguez replied saying no and that he was going to advertise online for sale.

Adoption: Approved

Action: Mrs. Hughes_M__ Mrs. Mariscal __aye____ Mrs. McGill __2__ Ms. Becerra__aye____ Mrs. Pace __1____

2.5* Accounts Payable for months November and December 2020. Mrs. McGill asked if there was a new alarm company being used, ADT. Superintendent Rodriguez responded that Protection One was bought out by ADT. No service changes.

Adoption: Approved

Action: Mrs. Hughes_M__ Mrs. Mariscal _1____ Mrs. McGill _aye____ Ms. Becerra__2____ Mrs. Pace _aye____

2.6* Interdistrict Attendance Agreement: Education Code 46600

1. One student to attend Santa Fe, PUSD

Adoption: Approved

Action: Mrs. Hughes_M__ Mrs. Mariscal __2__ Mrs. McGill _1____ Ms. Becerra__aye____ Mrs. Pace _aye____

2.7 * Assembly Bill 685 (Reyes) : The law also requires employers to notify all employees who were at a worksite of all potential exposures to COVID-19 and notify the local public health agency of outbreaks. Notice of Potential Exposure to COVID-19 letter to all employees. Superintendent Rodriguez explained that the new bill was put in place to inform employees that if they have been exposed to the Corona virus that it was the employers responsibility to inform employees within 24 hours. Only those employees who were directly exposed to the virus. This included students exposing employees to. The template will be used to inform employees.

Adoption: Approved

Action: Mrs. Hughes_M__ Mrs. Mariscal __2__ Mrs. McGill _aye____ Ms. Becerra__aye____ Mrs. Pace __1____

2.8* District of Certification Interim Report fiscal year 20-21: TCOE Ms. Justine Limas presenting the current budget report to December 2020. Ms. Limas referred to MYP restricted and unrestricted funds. She explained the projections for each object for the current fiscal year and the next two fiscal years. The projected budget included teacher salaries increase as well as teacher reduction. The projections were the worst case scenario. Board member Mrs. Pace asked if

the one time funding was to roll over the next year. Mrs. Lima responded that only certain one time funding will roll over as the others will have a deadline to be spent. The Board Revision was also included in this packet.

Adoption: Approved

Action: Mrs. Hughes_M__ Mrs. Mariscal __aye__ Mrs. McGill _1__ Ms. Becerra __2__ Mrs. Pace __aye__

2.9 * Iron Rod Metal Fencing: quotes for 260 feet of fencing; Durango Fencing \$14, 300 Anderson Fencing \$26, 882 and Lowes chain link fence \$6399. This quote is to place fencing on the asphalt entrance and corridor entrance. Superintendent Rodriguez explained that the iron rod/link fence was being planned to be installed at the front of the school parking lot as well as under the breeze way. But the decision was made to not install the fence on the parking lot due to construction. The next decision was to only put a fence at the entrance to the breezeway attached to the existing poles. This will also be a temporary fence until future modernization takes place. The board agreed to support Superintendent to purchase the fence under the breezeway entrance. The cost would be less than posted on the agenda.

Adoption: Approved

Action: Mrs. Hughes_M__ Mrs. Mariscal __aye__ Mrs. McGill _2__ Ms. Becerra __aye__ Mrs. Pace _1__

2.10 * Kindergarten Building Bids for contract approval; Integrated Designed accepted bids to hire a contractor to install the new kindergarten building. The cost estimate for \$200,000. Contractors with the lowest bid would be considered. Due to a last minute change the lowest bidder GPHI General Contractor requested to pull his bid. The next lowest bidder was Bush Engineering. Integrated Designed reviewed the financial increase from the original bid to be less than \$200K to \$312K. Integrated Design adjusted the plans to meet the new lowest bid. The board accepted the lowest bid of \$312K.

Adoption: Approved

Action: Mrs. Hughes_M__ Mrs. Mariscal __1__ Mrs. McGill __aye__ Ms. Becerra _2__ Mrs. Pace __aye__

3. Informational:

3.1 Tulare County Health Department approved Ducor School waiver to return to class. Cohort for K-2 may return in January after the County Health Department makes recommendation for schools to reopen.

3.2 State of Ca. dep. Of public health: Cohorts for middle school grades 6-8 can return without local health department approval.

3.3 LCAP Federal Amendment approved.

4. New Business: Any new business to include or discuss at the next meeting.
4.1.

5. Adjourn to Closed Session: Time: __6:25__ pm

Action: Mrs. Hughes_M__ Mrs. Mariscal _2__ Mrs. McGill __1__ Ms. Becerra __aye__ Mrs. Pace __aye__

6. Closed Session: Business

- 6.1. Employee Business (Gov. Code 54957) March 15 Probationary Non-Reelection Date
- 6.2. Superintendent Business

7. **Report Out of Closed Session:** **Time: __6:40__ pm**

Action: Mrs. Hughes _M__ Mrs. Mariscal __1__ Mrs. McGill __2__ Ms. Becerra __aye__ Mrs. Pace __aye__

8. **Adjournment:** **Time: __6:40__ pm**
aye

Action: Mrs. Hughes _M__ Mrs. Mariscal __1__ Mrs. McGill __2__ Mrs. Becerra __aye__ Mrs. Pace __aye__

Accounts Payable Final PreList - 12/29/2020 1:17:52PM

*** FINAL ***

Batch No 341

Audit

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
013517	LEAF	PV-210372	12/21/2020		11371640		010-00000-0-00000-72000-58000-0-0000 contract payment for lease on copiers	\$551.42		
013005	LOZANO SMITH	PV-210371	12/17/2020		2124879		010-00000-0-00000-71500-52000-0-0000 Brown Act and Biard training for Isidro	\$551.42		
							Total Check Amount:	\$150.00		
013547	Strategic Labor Solutions, LLC	PV-210374	12/20/2020		127		010-00000-0-00000-72000-58000-0-0000 monthly contractual fee for CTA & CSEA negotiatio	\$1,000.00		
							Total Check Amount:	\$1,000.00		
013583	STS Education, School Tech Sup	PV-210370	12/28/2020		53704		010-32200-0-11100-10000-43000-0-0000 Chromebooks, iPads for distance learning, includes	\$5,337.03		
	STS Education, School Tech Sup		12/28/2020		53704		010-32200-0-11100-10000-44000-0-0000	\$18,150.36	A	
	STS Education, School Tech Sup		12/28/2020		53704		010-32200-0-11100-10000-58000-0-0000	\$820.00	A	
							Total Check Amount:	\$24,307.39		
013578	THE FRUITGUYS	PV-210373	11/9/2020		5710795		130-53700-0-00000-37000-43000-0-0000 fruit and vegetables for kids program	\$672.00		
							Total Check Amount:	\$672.00		

2.5

Tulare County Office of Education

Accounts Payable Final PreList - 12/29/2020 1:17:52PM

12/29/2020
1:17:52PM

*** FINAL ***

Batch No 341

Audit

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
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Total District Payment Amount:

\$26,680.81

Accounts Payable Final PreList - 12/29/2020 1:17:52PM

*** FINAL ***

Batch No 341

Audit

Amount Flag EFT

Reference Invoice

Number Date

PO # Invoice No

Separate

Check Account Code

Batch No 341

Total Accounts Payable: \$26,680.81

The School District hereby orders that payment be made to each of the above vendors in the amounts indicated on the preceding Accounts Payable Final totaling 26,680.81 and the County Office of Education transfer the amounts from the indicated funds of the district to the Check Clearing Fund in order that checks may be drawn from a single revolving fund (Education Code 42631 & 42634).

Authorizing Signature

Date

Fund Summary

	Total
010	\$26,008.81
130	\$672.00
Total	\$26,680.81

*** FINAL ***

Batch No 340

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT	Audit
013295	AT&T	PV-210363	11/25/2020		NOV 25, 2020		010-00000-0-00000-82000-55000-0-0000	\$75.75			
						long distance, fire alarm, ADT					
013515	California Business Machines	PV-210361	11/30/2020		262864		010-00000-0-00000-72000-58000-0-0000	\$75.75			
						toner maintenance for copiers					
013417	Culligan (Water Conditioning)	PV-210365	11/30/2020		36205		010-00000-0-00000-82000-55000-0-0000	\$208.18			
						bottled water delivery					
013582	Donna's Instruction Hub	PV-210369	12/22/2020		Job #2020-1		010-07230-0-00000-36000-58000-0-0000	\$57.00			
						Defensive driving/Pre trip inspection inservice					
011811	DUCOR COMMUNITY SERVICES DISTR	PV-210362	12/1/2020		12/1/20-12/31/20		010-00000-0-00000-82000-55000-0-0000	\$750.00			
						water					
013451	Juan T. Reyes Consulting	PV-210367	12/1/2020		0005		010-31820-0-11100-10000-58000-0-0000	\$316.67			
						supervisor of mentor leadership program and life s					L
013199	RES COM Pest Control	PV-210368	12/5/2020		1881265		130-53100-0-00000-82000-55000-0-0000	\$6,990.00			
						spray for ants, roaches, spiders					
013162	SOUTHWEST SCHOOL SUPPLY	PV-210357	12/17/2020		767982		010-32200-0-11100-10000-43000-0-0000	\$45.00			
						classroom supplies for TK					
	SOUTHWEST SCHOOL SUPPLY	PV-210358	12/17/2020		767983		010-32200-0-11100-10000-43000-0-0000	\$45.00			
						classroom supplies for 1st grade					
	SOUTHWEST SCHOOL SUPPLY	PV-210359	12/17/2020		767984		010-32200-0-11100-10000-43000-0-0000	\$10.07			
						classroom supplies for 3rd grade					
								\$21.55			

Accounts Payable Final PreList - 12/22/2020 12:48:18PM

*** FINAL ***

Batch No 340

Audit

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
013162	SOUTHWEST SCHOOL SUPPLY	PV-210360	12/17/2020		768205		010-32200-0-11100-10000-43000-0-0000 classroom supplies for 5th grade	\$22.63		
013583	STS Education, School Tech Sup	PV-210356	10/19/2020		52709			\$110.56		
	STS Education, School Tech Sup		10/19/2020		52709		010-32200-0-11100-10000-43000-0-0000 Chromebooks for distance learning, includes licens	\$888.67		
	STS Education, School Tech Sup		10/19/2020		52709		010-32200-0-11100-10000-44000-0-0000	\$56,350.00	A	
							010-32200-0-11100-10000-58000-0-0000	\$2,240.00	A	
013577	T-Mobile USA Inc.	PV-210366	10/20/2020		202012081455			\$59,478.67		
							010-32200-0-11100-10000-58000-0-0000 mobile hotspots for students/distance learning	\$1,200.00		
012709	TULARE COUNTY OFFICE OF ED.	PV-210364	11/23/2020		210566			\$1,200.00		
							010-00000-0-00000-71500-52000-0-0000 Title IX Compliance & Investigation Seminar/Isidro	\$100.00		
							Total Check Amount:	\$100.00		

Accounts Payable Final PreList - 12/22/2020 12:48:18PM

*** FINAL ***

Batch No 340

Audit
Amount Flag EFT

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code
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Total District Payment Amount: \$69,331.83

*** FINAL ***

Batch No 340

Audit

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
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Batch No 340

Total Accounts Payable: \$69,331.83

The School District hereby orders that payment be made to each of the above vendors in the amounts indicated on the preceding Accounts Payable Final totaling 69,331.83 and the County Office of Education transfer the amounts from the indicated funds of the district to the Check Clearing Fund in order that checks may be drawn from a single revolving fund (Education Code 42631 & 42634).

Authorizing Signature

Date

Fund Summary		Total
010		\$69,286.83
130		\$45.00
Total		\$69,331.83

Accounts Payable Final PreList - 1/6/2021 1:40:50PM

*** FINAL ***

Batch No 342

Audit

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
013311	AMERIPRIDE UNIFORM SERVICE	PV-210384	12/11/2020		1502725991		010-00000-0-00000-82000-55000-0-0000	\$74.83		
	AMERIPRIDE UNIFORM SERVICE	PV-210385	12/25/2020		1502733687		010-00000-0-00000-82000-55000-0-0000	\$74.83		
								\$149.66		
013295	AT&T	PV-210378	12/25/2020		DEC 25, 2020		010-00000-0-00000-82000-55000-0-0000	\$57.22		
							long distance, fire alarm, ADT			
								\$57.22		
013515	California Business Machines	PV-210376	12/30/2020		264652		010-00000-0-00000-72000-58000-0-0000	\$187.31		
							toner maintenance for copiers			
								\$187.31		
001647	DUCOR TELEPHONE CO	PV-210377	1/1/2021		000411		010-00000-0-00000-82000-55000-0-0000	\$364.42		
							school phones			
								\$364.42		
012681	SISC III	PV-210379	1/1/2021		1/01/2021-1/31/2021		010-00000-0-00000-00000-95028-0-0000	\$2,318.40		G
	SISC III		1/1/2021		1/01/2021-1/31/2021		Health & Welfare, Employee/Retiree portion			
							010-00000-0-00000-00000-95024-0-0000	\$20,389.40		G
								\$22,707.80		
005384	SOUTHERN CALIFORNIA EDISON	PV-210386	12/26/2020		Dec 26, 2020		010-00000-0-00000-82000-55000-0-0000	\$1,277.26		
							electricity			
								\$1,277.26		
013578	THE FRUITGUYS	PV-210380	1/4/2021		5721668		130-53700-0-00000-37000-43000-0-0000	\$473.00		
							food items for students from Fruit & Vegetable pro			
								\$473.00		
012837	THE HOME DEPOT PRO-Supplyw	PV-210381	12/1/2020		587499989		010-32100-0-00000-81000-44000-0-0000	\$870.56		
	rks						Victory electro hand sprayer for Covid disinfectin			
	THE HOME DEPOT PRO-Supplyw	PV-210382	11/30/2020		587246497		010-00000-0-00000-82000-55000-0-0000	\$90.45		
	rks						niosh respirator masks			

Accounts Payable Final PreList - 1/6/2021 1:40:50PM

*** FINAL ***

Batch No 342

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
012837	THE HOME DEPOT PRO-Supplyw rks	PV-210383	11/30/2020		587088147		010-00000-0-00000-82000-55000-0-0000	\$527.99		H
						Renown floor stripper, detergent deodorizer, glove				
012434	WASTE MANAGEMENT	PV-210375	1/1/2021		4484767-0165-2		010-00000-0-00000-82000-55000-0-0000	\$356.62		
						trash services for December 2020				
						Total Check Amount:		\$1,489.00		
						Total Check Amount:		\$356.62		

Accounts Payable Final PreList - 1/6/2021 1:40:50PM

*** FINAL ***

Batch No 342
Audit

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
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Total District Payment Amount: \$27,062.29

*** FINAL ***

Batch No 342

Audit

Amount

Flag

EFT

Vendor No

Vendor Name

Reference Number

Invoice Date

PO #

Invoice No

Separate Check

Account Code

Batch No 342

Total Accounts Payable:

\$27,062.29

The School District hereby orders that payment be made to each of the above vendors in the amounts indicated on the preceding Accounts Payable Final totaling 27,062.29 and the County Office of Education transfer the amounts from the indicated funds of the district to the Check Clearing Fund in order that checks may be drawn from a single revolving fund (Education Code 42631 & 42634).

Authorizing Signature

Date

Fund Summary		Total
010		\$26,589.29
130		\$473.00
Total		\$27,062.29

Tulare County Office of Education

Committed to Students, Support & Service

2.6

Tim A. Hire
County
Superintendent
of Schools

P.O. Box 5091
Visalia, California
93278-5091

(559) 733-6300
tcoe.org

Administration
(559) 733-6301
fax (559) 627-5219

Business Services
(559) 733-6474
fax (559) 737-4378

Human Resources
(559) 733-6306
fax (559) 627-4670

Instructional Services
(559) 302-3633
fax (559) 739-0310

Special Services
(559) 730-2910
fax (559) 730-2511

Main Locations

**Administration
Building & Conference
Center**
6200 S. Mooney Blvd.
Visalia

Doe Avenue Complex
7000 Doe Ave.
Visalia

**Liberty Center/
Planetarium &
Science Center**
11535 Ave. 264
Visalia

January 5, 2021

Isidro Rodriguez, Jr., Superintendent
Ducor Union School District
PO Box 249
Ducor CA 93218

Dear Isidro,

This will acknowledge receipt on January 5, 2021 of Patricia Hughes' letter notifying this office of her resignation from the Ducor Union School District board.

Pursuant to Education Code section 5091, within 60 days of filing the resignation with the county superintendent, or the filing of a deferred resignation, the district must either make a provisional appointment or order an election. The 60-day period for this vacancy ends on March 6, 2021.

Please use the enclosed form letter, "Notifying County Superintendent of Board's Decision Whether to Appoint or Call Election for Board Vacancy," to notify my office how the district plans to fill this vacancy so that we can help you proceed with the next steps and legal requirements to be taken.

Should the board decide to make a provisional appointment, a Certificate of Appointment-Oath of Office is enclosed and may be used at the time of the appointment. If the district appoints, the appointee will take office immediately upon being sworn in and will serve until the district's election in November 2022. At that time the position will be open for election for a "short term" which will expire in December 2024. Within 10 days of making a provisional appointment, you must notify this office so that we may prepare and publish a notice of appointment. Your district must also post the notice of appointment in three (3) public places in the district. (Education Code 5092)

Whenever there is a change in any of the items included on the Registry of Public Agencies – SF-405 (formerly known as Statement of Facts) (copy enclosed), the district must file an amended SF-405 with the Secretary of State and the County Clerk, and must also file, for the departing and arriving board members, their respective conflict of interest statements (Form 700). The Form 700 is available at <http://www.fppc.ca.gov/>.

If you have any questions or would like additional assistance, please do not hesitate to contact us.

Sincerely,



Tim A. Hire
Tulare County Superintendent of Schools

TAH/sd
Enclosures

**NOTIFYING COUNTY SUPERINTENDENT OF BOARD'S DECISION
WHETHER TO APPOINT OR CALL ELECTION FOR BOARD VACANCY**

TO: Tulare County Superintendent of Schools, Attn: Shelly DiCenzo

FROM: _____ School District

DATE: _____, 20__

At a regular/special meeting on _____, 20__, the governing board of the above-listed school district decided the following with respect to the trustee position formerly filled by _____:

_____ To make a provisional appointment to fill the vacancy*
An appointee (and board members) must be 18 years of age or older, a citizen of the state, a resident of the school district, a resident of the trustee area represented (if the district is divided into trustee areas), and a registered voter. (Education Code 35107)

_____ To order an election to fill the vacancy

Dated _____

Clerk/Secretary of said District

*If board decides to make an appointment, please specify in what newspaper you would like the county office to publish your notice of appointment after board has completed the appointment:

(name of newspaper)

You must notify TCOE within 10 days of making an appointment (Ed Code §5092) and post the notice of appointment provided by TCOE in three public places in the district

CERTIFICATE OF APPOINTMENT OF GOVERNING BOARD MEMBER

THIS CERTIFIES that the undersigned, being the remaining members of the governing board of the Ducor Union School District in Tulare County, California, on the date entered below have appointed

to the office of Governing Board Member of the above named district to replace Patricia Hughes and to hold office until the next governing board election of said district in November 2022.

Date: _____

Signatures of Remaining Board Members

Before taking office, each member must take and subscribe this Oath of Office before a governing board member, other school officer, state or county officer, judicial officer or notary public. Send the ORIGINAL to the County Elections Office, 5951 S. Mooney Blvd., Visalia, CA 93277, and a COPY to the County Superintendent of Schools after completion.

OATH OF OFFICE

State of California
County of Tulare

I, _____ do solemnly swear (or affirm) that I will support and defend the Constitution of the United States and the Constitution of the State of California against all enemies, foreign and domestic; that I will bear true faith and allegiance to the Constitution of the United States and the Constitution of the State of California; that I take this obligation freely, without any mental reservation or purpose of evasion; and that I will well and faithfully discharge the duties upon which I am about to enter.

Governing Board Member of the Ducor Union School District

Candidate Signature

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

State of California)
County of Tulare)

Subscribed and sworn to (or affirmed) before me on this _____ day of _____ 2021, by _____, proved to me on the basis of satisfactory evidence to be the person(s) who appeared before me.

Signature of Person Administering Oath

Title

Filling a Board Vacancy Tulare County Office of Education Reference Sheet

*This reference sheet is intended to provide a step by step overview of the process to fill a school board vacancy.
This is intended to be a helpful resource, but should not replace review of the relevant legal codes and board bylaws.*

STEP 1	Notify the County Superintendent of the Vacancy
<p><u>Immediately</u> send the County Superintendent written notice of a resignation or other basis for board vacancy. The County Superintendent will generate a letter explaining next steps, timelines, and the remaining term for the vacancy.</p> <ul style="list-style-type: none"> ➤ A vacancy on the board may be due to any event listed in Government Code section 1770. <ul style="list-style-type: none"> ○ The most common events include: (1) death, (2) resignation, (3) removal from office, (4) no longer a resident of that district or trustee area, (5) unexcused absence from California for more than 60 days, (6) unexcused failure to perform duties of office for 3 consecutive months, (7) conviction of felony or any offense involving a violation of official duties. (Gov. Code, § 1770.) ➤ A resignation is effective the date it is received by the County Superintendent, unless it has a deferred effective date. A resignation may not be deferred more than 60 days after a resignation is filed with the County Superintendent. (Ed. Code, §§ 5090, 5091.) 	

STEP 2	Determine whether the District (1) is <i>Required</i> to Call an Election or (2) Has Discretion to Make a Provisional Appointment
<p>The date of the vacancy will determine whether the district is (1) <i>required</i> to fill the seat by election, or (2) has the <i>discretion</i> to make a provisional appointment or hold an election.</p> <ul style="list-style-type: none"> ➤ <u>Mandatory Election.</u> District must fill the vacancy by election if the vacancy occurs: <ul style="list-style-type: none"> ○ Within the last 4 months of the board member's term. (Ed. Code, § 5093, subd. (a).) The position must remain vacant until the next regularly scheduled election. ○ Between 6 months and 130 days prior to the next regular election and the vacated seat is <i>not</i> scheduled to be filled that election. (Ed. Code, § 5093, subd. (b).) The district must call a special election to be consolidated with the regular election. ➤ <u>Discretion to Choose Provisional Appointment or Election.</u> If the date of the vacancy does not fall within one of the above time frames, the district has the discretion to make a provisional appointment or call an election to fill the vacancy. In this case, the Board must make a provisional appointment or order an election within 60 days of the vacancy.¹ If the district fails to make a provisional appointment or order an election within 60 days of the vacancy, the County Superintendent shall order an election to fill the vacancy. (Ed. Code, § 5091, subd. (a)(2).) 	

STEP 3 A	Calling an Election
<p>If the date of the vacancy requires the district to call an election, or the district has discretion to make a provisional appointment but instead decides to call an election, notify legal counsel <u>immediately</u>. Legal counsel can assist in the process for calling an election, which will require, at minimum, identifying when the election is required to be held, and adopting a resolution (1) calling the election and (2) providing specifications for that election.</p>	

¹ When a vacancy occurs because no candidate or an insufficient number of candidates have been nominated to run in a district election ("failure to elect"), a different set of appointment rules apply. (Ed. Code § 5328.)

STEP 3 B

Making a Provisional Appointment

If the timing of the vacancy provides the district with discretion to make a provisional appointment, the district has 60 days from the date of the vacancy to make the appointment. (Ed. Code, § 5091.) The procedures for locating, screening and appointing a potential board member are largely left to the discretion of the individual school board, and many of the specific procedures are found in the district's board bylaws. Consider the following steps:

1. Advertise the Vacancy. Advertise the vacancy to attract candidates and promote transparency. (Some districts' bylaws require advertising in the local media.)
2. Screen the Applicants. Screen applicants to ensure that they meet all minimum qualifications for serving on the board. To serve on the board, an applicant must be 18 years of age or older, a citizen of the state, a resident of the school district or trustee area if applicable, a registered voter, and not disqualified from holding a civil office. (Ed. Code, § 35107.) (Some districts' bylaws require the formation of a committee consisting of less than a quorum of the board to ensure that applicants are eligible for board membership, and to announce the names of the eligible candidates.)
3. Interview Eligible Applicants. The Board will interview all eligible candidates in open session.
4. Make the Appointment. The Board will select the person to be appointed in open session. A board member who resigned with a deferred effective date may not vote on his or her successor. (Ed. Code, § 35178.)
5. Swear in the Appointee. Swear in the appointee. The appointee has all powers and duties of a board member immediately following his or her appointment. (Ed. Code, § 5091, subd. (d).) The appointee serves only until the next regular district election.
6. Notify County Superintendent. Immediately notify the County Superintendent of the provisional appointment.
7. Publish Notice of Provisional Appointment. The law *requires* that the district post and publish a notice of provisional appointment within 10 days of the provisional appointment. Once the district notifies the Tulare County Superintendent of the provisional appointment, the County office can help prepare the notice and publish it in a newspaper of general circulation in the district. The district must post the notice in three public places in the district. (Ed. Code, § 5092.) Voters have 30 days from the date of the appointment to file a petition challenging the provisional appointment, and forcing the district to conduct a special election to fill the vacancy. (Ed. Code, § 5091, subd. (c).)

STEP 4

Fill out Required Forms

Complete and file the Statement of Facts and Conflict of Interest Statement.

- The board must fill out a new Register of Public Agencies for the Secretary of State, and send copies to the County Superintendent and the County Clerk. This document must include the name and mailing address of the public agency; the name and address of each board member; and the name and address of the president, clerk, and secretary of the board. (Gov. Code, § 53051.)
- The new board member and the departing board member must both complete and file Form 700 – Conflict of Interest Statement. (Gov. Code, § 87500.)

Disclaimer: As the information contained herein is necessarily general, its application to a particular set of facts and circumstances may vary. For this reason, this document does not constitute legal advice. We recommend that you consult with your counsel prior to acting on the information contained herein.

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Local Control Funding Formula (LCFF) Budget Overview for Parents

Developed by the California Department of Education, September 2020

LCFF Budget Overview for Parents: Data Input

Local Educational Agency (LEA) name:	Ducor Elementary
CDS code:	54-71894
LEA contact information:	Isidro Rodriguez, Superintendent
Current School Year:	2020-2021
Prior School Year	2019-2020

*NOTE: The "High Needs Students" referred to in the tables below are Unduplicated Students for LCFF funding purposes.

Projected General Fund Revenue for the 2020-2021 School Year		Amount
Total LCFF funds	\$	1,692,031
LCFF supplemental & concentration grants	\$	406,595
All other state funds	\$	132,947
All local funds	\$	36,131
Total federal funds	\$	767,303
Federal CARES funds	\$	238,595
Total Projected Revenue	\$	2,628,412
Total Budgeted Expenditures for the 2020-2021 School Year		Amount
Total Budgeted General Fund Expenditures	\$	2,755,537
Total Budgeted Expenditures in the Learning Continuity Plan	\$	-
Total Budgeted Expenditures for High Needs Students in the Learning Continuity Plan	\$	-
Expenditures not in the Learning Continuity Plan	\$	2,755,537
Expenditures for High Needs Students in the 2019-2020 School Year		Amount
Total Budgeted Expenditures for High Needs Students in the LCAP	\$	439,636
Actual Expenditures for High Needs Students in LCAP	\$	414,014

LCFF Budget Overview for Parents: Narrative Responses

LCFF Budget Overview for Parents Narrative Responses Sheet

Required Prompt(s)	Response(s)
Briefly describe any of the General Fund Budget Expenditures for the school year not included in the Learning Continuity Plan.	The Learning Continuity Plan includes a narrative description of the use of federal one-time-use funding for specific required prompts in the LCP. The district budget includes these as well as all other sources of funds (state, federal, and local) per state and federal requirements.
The amount budgeted to increase or improve services for high needs students in the 2020-2021 Learning Continuity Plan is less than the projected revenue of LCFF supplemental and concentration grants for 2020-2021. Provide a brief description of the additional actions the LEA is taking to meet its requirement to improve services for high needs students.	Additional actions to improve services for high need students include attention to assuring equity of access to and ease of use of distance learning devices and connectivity. It also includes professional development and support for teachers in addressing the needs of high need students in the online environment, including the social/emotional needs of these students. It also includes support for parents who are working to help their children with schooling even as they struggle with the impact of the COVID-19 emergency orders at home.
The total actual expenditures for actions and services to increase or improve services for high needs students in 2019-2020 is less than the total budgeted expenditures for those planned actions and services. Briefly describe how this difference impacted the actions and services and the overall increased or improved services for high needs students in 2019-2020.	During the previous and current year, one-time use federal funds were made available to address the emergency critical need to substantially increase online opportunity and effectiveness (devices and Internet access) for our unduplicated count students as well as to increase, expand, and improve online services for these students. Because these federal funds specifically targeted these options, we were able to substantially expand services for our unduplicated count students with targeted federal funds. The resulting unexpended LCFF Supplemental and Concentration grant funds are thus available to improve and expand, as well as to develop new services, to address any continuing or new learning loss and social/emotional issues which might result from COVID emergency measures

LCFF Budget Overview for Parents

LCFF Budget Overview for Parents Template

Local Educational Agency (LEA) Name: Ducor Elementary

CDS Code: 54-71894

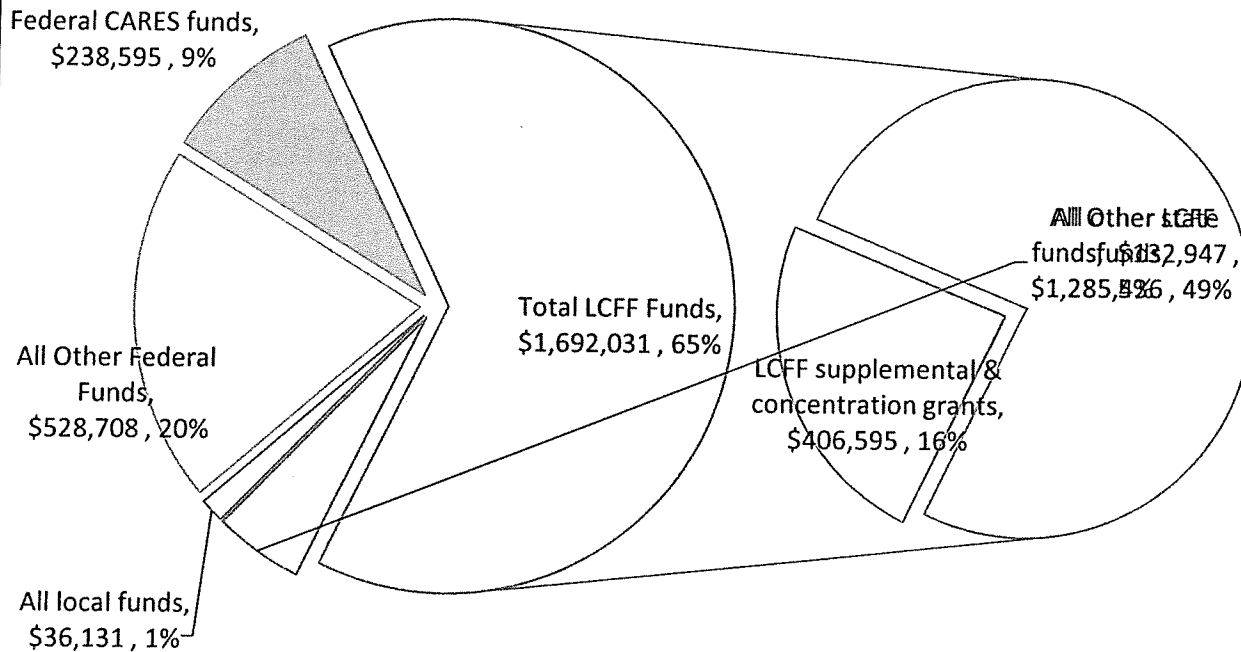
School Year: 2020-2021

LEA contact information: Isidro Rodriguez, Superintendent

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

Budget Overview for the 2020-2021 School Year

Projected Revenue by Fund Source



This chart shows the total general purpose revenue Ducor Elementary expects to receive in the coming year from all sources.

LCFF Budget Overview for Parents

The total revenue projected for Ducor Elementary is \$2,628,412.00, of which \$1,692,031.00 is Local Control Funding Formula (LCFF) funds, \$132,947.00 is other state funds, \$36,131.00 is local funds, and \$767,303.00 is federal funds. Of the \$767,303.00 in federal funds, \$238,595.00 are federal CARES Act funds. Of the \$1,692,031.00 in LCFF Funds, \$406,595.00 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

For the 2020-21 school year school districts must work with parents, educators, students, and the community to develop a Learning Continuity and Attendance Plan (Learning Continuity Plan). The Learning Continuity Plan replaces the Local Control and Accountability Plan (LCAP) for the 2020–21 school year and provides school districts with the opportunity to describe how they are planning to provide a high-quality education, social-emotional supports, and nutrition to their students during the COVID-19 pandemic.

Budgeted Expenditures in the Learning Continuity Plan		
\$ 1		
\$ 1		
\$ 1		
\$ 0	Total Budgeted Expenditures in the Learning Continuity Plan	Total Budgeted Expenditures for High Needs Students in the Learning Continuity Plan,
\$ 0	\$-	\$-
\$ 0		

This chart provides a quick summary of how much Ducor Elementary plans to spend for planned actions and services in the Learning Continuity Plan for 2020-2021 and how much of the total is tied to increasing or improving services for high needs students.

Ducor Elementary plans to spend \$2,755,537.00 for the 2020-2021 school year. Of that amount, \$0.00 is tied to actions/services in the Learning Continuity Plan and \$2,755,537.00 is not included in the Learning Continuity Plan. The budgeted expenditures that are not included in the Learning Continuity Plan will be used for the following:

The Learning Continuity Plan includes a narrative description of the use of federal one-time-use funding for specific required prompts in the LCP. The district budget includes these as well as all other sources of funds (state, federal, and local) per state and federal requirements.

Increased or Improved Services for High Needs Students in in the Learning Continuity Plan for the 2020-2021 School Year

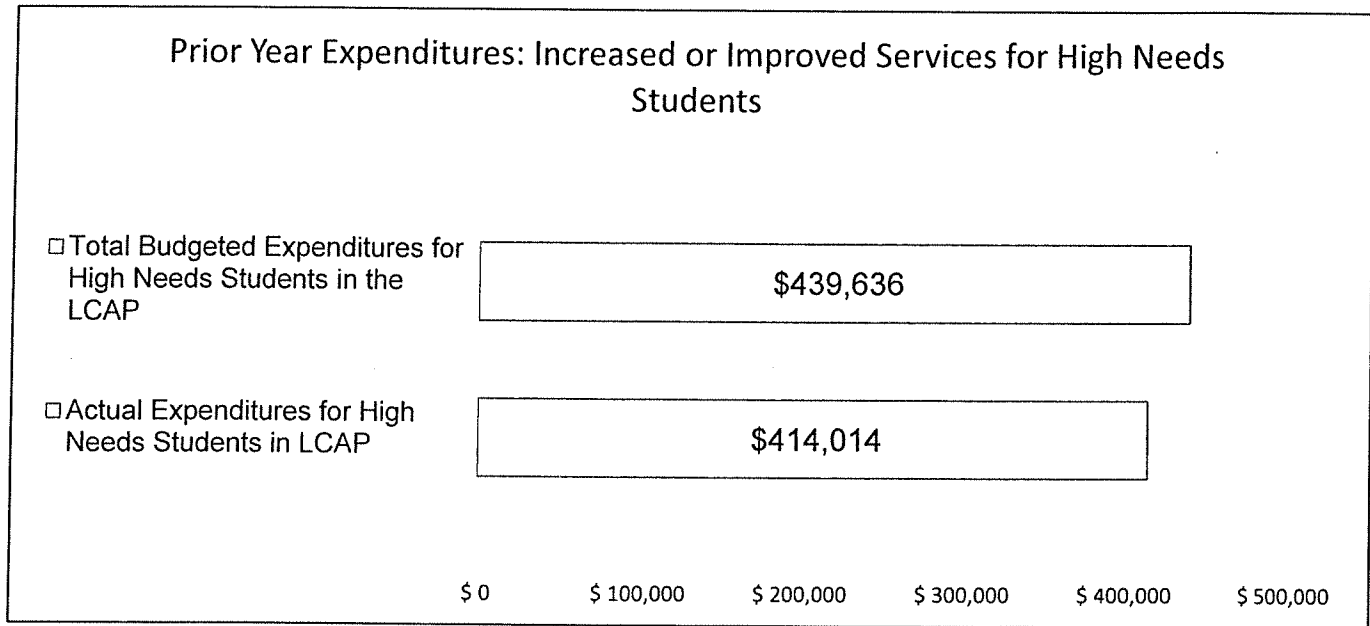
LCFF Budget Overview for Parents

In 2020-2021, Ducor Elementary is projecting it will receive \$406,595.00 based on the enrollment of foster youth, English learner, and low-income students. Ducor Elementary must describe how it intends to increase or improve services for high needs students in the Learning Continuity Plan. Ducor Elementary plans to spend \$0.00 towards meeting this requirement, as described in the Learning Continuity Plan. The additional improved services described in the plan include the following:

Additional actions to improve services for high need students include attention to assuring equity of access to and ease of use of distance learning devices and connectivity. It also includes professional development and support for teachers in addressing the needs of high need students in the online environment, including the social/emotional needs of these students. It also includes support for parents who are working to help their children with schooling even as they struggle with the impact of the COVID-19 emergency orders at home.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2019-2020



This chart compares what Ducor Elementary budgeted in the 2019-20 LCAP for actions and services that contributed to increasing or improving services for high needs students with what Ducor Elementary actually spent on actions and services that contributed to increasing or improving services for high needs students in the 2019-20 school year.

In 2019-2020, Ducor Elementary's LCAP budgeted \$439,636.00 for planned actions to increase or improve services for high needs students. Ducor Elementary actually spent \$414,014.12 for actions to increase or improve services for high needs students in 2019-2020. The difference between the budgeted and actual expenditures of \$25,621.88 had the following impact on Ducor Elementary's ability to increase or improve services for high needs students:

During the previous and current year, one-time use federal funds were made available to address the emergency critical need to substantially increase online opportunity and effectiveness (devices and Internet access) for our unduplicated count students as well as to increase, expand, and improve online services for these students. Because these federal funds specifically targeted these options, we were able to substantially expand services for our unduplicated count students with targeted federal funds. The resulting unexpended LCFF Supplemental and Concentration grant funds are thus available to improve and expand, as well as to develop new services, to address any continuing or new learning loss and social/emotional issues which might result from COVID emergency measures

2.8

School Year: 2020-2021

School Plan for Student Achievement (SPSA) Template

Instructions and requirements for completing the SPSA template may be found in the SPSA Template Instructions.

School Name	County-District-School (CDS) Code	Schoolsite Council (SSC) Approval Date	Local Board Approval Date
Ducor Elementary School	54718946054019	[Add SSC Approval Date here]	[Add Local Board Approval date here]

Purpose and Description

Briefly describe the purpose of this plan (Select from Schoolwide Program, Comprehensive Support and Improvement, Targeted Support and Improvement, or Additional Targeted Support and Improvement)

Comprehensive Support and Improvement (CSI)

Briefly describe the school's plan for effectively meeting the ESSA requirements in alignment with the Local Control and Accountability Plan and other federal, state, and local programs.

To ensure that this school's SPSA effectively meets ESSA requirements, the school has reviewed student performance data for all students, with special attention to historically underserved student groups, including low-income students, students with disabilities, English learners, and Latino/a students. The school has developed practice to address the unique needs of each student group and will measure effectiveness of these practices by monitoring implementation and tracking progress towards the school's annual student performance targets. Goals, targets, practices, and budget expenditures align to the district's Learning Continuity and Attendance Plan, the draft LCAP, and the specific purposes of each funding program.

Stakeholder Involvement

How, when, and with whom did the school consult as part of the planning process for this SPSA/Annual Review and Update?

Involvement Process for the SPSA and Annual Review and Update

School Site Council (SSC): On November 16, 2020, this plan was presented to the SSC team consisting of five parents, the administrator, three teachers, and one classified staff member.

School MTSS Team: meet once per month and comprised of teachers at each grade span, admin., academic coach, and counselor support team. This team is primarily charged with developing the plan with parent and community input.

English Learner Advisory Committee (ELAC): On November 16, 2020, this plan was presented to the ELAC team consisting of three parents.

All staff meetings: meet every Wednesday afternoon during teacher collaborative time; some agendas include planning, budgeting, curriculum, and intervention. Plan is reviewed with bargaining unit during those meetings.

School board: meet every second Tuesday of the month. Review planning, budgeting, and evaluation.

Student surveys and classroom discussions: happen quarterly and include what students would like to include in planning. Students want more technology, better playground equipment and athletic materials, field trips, and music.

Resource Inequities

Briefly identify and describe any resource inequities identified as a result of the required needs assessment, as applicable.

Using results from system assessments (including the FIA), focus groups, interviews, and surveys, a few key areas surfaced that the school needs to address.

Data-based decision making: whether connected to attendance or academics, the school does not have a coherent data system to monitor interim progress on attendance and academics. The district is in need of tools to help identify needed supports for both intervention (Tier II) and universal (Tier I) instruction and attendance challenges throughout the year.

Educator coaching & learning: teachers need both content-specific tools and resources for intervention and curriculum along with staff or contractors that can train and coach them through improvement in these areas.

Attendance and behavior: the system is in the process of developing a more robust Tier II system for students who need additional behavioral or attendance supports in the form of counseling, peer groups, or case management.

Goals, Strategies, Expenditures, & Annual Review

Complete a copy of the Goal table for each of the school's goals. Duplicate the table as needed.

Goal 1

Common Core (English Language Arts, English Language Development, and Mathematics) and other state content and performance standards will be fully implemented in all classrooms to provide access to a rigorous course of student and maximum learning opportunities for all students and all subgroups. Conditions of learning improvements and pupil and parent engagement improvements will result in improved student achievement and reduced risk factors.

Identified Need

The eight state priorities, the state accountability system, and the local evaluation indicate the need to effectively and expeditiously implement state academic and performance standards first in the Common Core ELA, ELD, and Math and then in the broad course of study. Local evaluation confirms that the Common Core is now being fully implemented. The next step is to move to sustainability which includes broadening and deepening the curriculum and instruction by way of standardized assessment and progress monitoring. Special attention must be paid to teacher coaching and support, assessment monitoring systems, creating the conditions for student learning, and systems improvement. This is a comprehensive goal because implementation of state academic content and performance standards is complex and directly involves all of the eight state priorities.

Annual Measurable Outcomes

Metric/Indicator	Baseline/Actual Outcome (2018-19)	Expected Outcome (2020-21)
ELA SBAC DF3 All Students	-72.7	-52.7 (+20)
ELA SBAC DF3 SED	-72.7	-52.7 (+20)
Math SBAC DF3 All Students	-123.6	-103.6 (+20)
Math SBAC DF3 SED	-126.5	-106.5 (+20)
Chronic Absences SED	14.2%	9.2% (-5%)
Chronic Absenteeism All Students	16%	10% (-6%)
Suspensions	1%	0% (-1%)
Acadience Reading Level All Students	N/A	80% improve from Middle-of-year (MOY) to End-of-year (EOY) assessment
ELA Benchmark All Students	N/A	25% proficiency

Complete a copy of the Strategy/Activity table for each of the school's strategies/activities. Duplicate the table, including Proposed Expenditures, as needed.

Strategy/Activity 1

Students to be Served by this Strategy/Activity

(Identify either All Students or one or more specific student groups)

- 1.1 (SED, English Learners) Substitutes for teachers who attend MTSS meetings and trainings to advance data-based decision making and teaching and learning
- 1.2 (SED, English Learners) Training registration and travel for training to enhance supports for EL and SED students
- 1.3 (All students) Tier I and Tier II curriculum evidence-based curriculum to address student academic needs, particularly related to literacy

- 1.4 (All students) Improvement coaching and support for staff to advance MTSS work for both ELA and SEL supports for students.
- 1.5 (All students) Web-based internet programs licenses will be purchased to help support learners
- 1.6 (All students) Counseling and youth development support, including home visits, SEL assessments, and capacity building support for behavior
- 1.7 (All students) Continue to support and enhance technology infrastructure and teacher/student technology resources to assure access to digital resources in response to digital literacy needs of students in achieving state standards
- 1.8 (All students) Instructional tablets to support online assessments
- 1.9 (SED, English Learners) Provide evidence-based program of support and intervention for students who are achieving below standard to remediate gaps in knowledge and skills and assure student access to the broad course of study. This will include extended learning time provided by certificated and classified staff in classroom settings of one-on-one and small-group instruction as well as in extended day settings. These staff will be providing training and supplemental materials to differentiate instruction to maximize student learning and achievement
- 1.10 (All students) Provide for optimum teacher effectiveness through a professional development program that deepens and expands teacher knowledge and skills in developing student achievement as well as by recruiting, hiring, and retaining fully credentialed, high quality teachers.
- 1.11 (All students) Provide evidence-based program to assure that students engage in the school community and a well-rounded education through interaction with experiential learning, extended learning in alternative settings, through the use of standards-aligned supplemental materials including technology resources
- 1.12 (All students) Provide an evidence-based supplemental program to support student acquisition of digital literacy skills for success in the broad course of student with purchase of technology assets and materials.

Strategy/Activity

See above

Proposed Expenditures for this Strategy/Activity

List the amount(s) and funding source(s) for the proposed expenditures. Specify the funding source(s) using one or more of the following: LCFF, Federal (if Federal identify the Title and Part, as applicable), Other State, and/or Local.

Amount(s)	Source(s)
1.1 \$6,045	CSI
1.2 \$2,700	CSI
1.3 \$43,000	CSI
1.4 \$50,000	CSI

1.5 \$24,000 Acadiance ALO (LLM 50%+ CSI 50%); \$14,125 Illuminate (LLM CRF 36% + CSI 64%); \$20,000 Edgenuity (LLM & LLM CRF)	LLM + LLM CRF + CSI
\$60,000 Chromebooks (LLM CRF)	
1.6 \$50,078	CSI
1.7 \$15,794	Title I Part A
1.8 \$6,300	CSI
1.9 \$89,690	Title I Part A
1.10 \$11,054	Title II Part A
1.11 \$10,000	Title IV
1.12 \$3,225	Title V

Annual Review

SPSA Year Reviewed: 2019-20

Respond to the following prompts relative to this goal. If the school is in the first year of implementing the goal, an analysis is not required and this section may be deleted.

ANALYSIS

Describe the overall implementation of the strategies/activities and the overall effectiveness of the strategies/activities to achieve the articulated goal.

Broad goal aimed at closing achievement gaps. Focus on strategies to mitigate challenges created by poverty:

- Literacy gaps due to family resources
- Few community assets available (libraries, social activities, cultural activities, sports and recreational outlets, etc.)
- Fewer school resources (such as guidance counselors, mentors, informational resources, certificated school nurses, libraries, etc.)

Strategies to address challenges:

- Focus on teaching and learning
- Tiered professional development in standards implementation
- Differentiated instruction to meet student needs
- Create a variety of school-based learning environments to meet student needs
- Support for teachers
- Support for students

- Early identification of literacy gaps and intervention
- Creation of an information-rich environment
- Focus on literacy in the content areas

Briefly describe any major differences between the intended implementation and/or the budgeted expenditures to implement the strategies/activities to meet the articulated goal.

N/A - District LCAP was submitted in lieu of SPSA plan last year

Describe any changes that will be made to this goal, the annual outcomes, metrics, or strategies/activities to achieve this goal as a result of this analysis. Identify where those changes can be found in the SPSA.

Changes

- Annual outcomes and metrics: New goals were set for every measure category. Two new local metrics were added (Acadience Literacy Measure and ELA Benchmarks)
- Strategies/activities: These have primarily stayed the same; however action 1.5 has new web-based assessment tools and actions 1.4 includes external support for improvement coaching for staff and counseling for students

Goal 2

English Language Development CCSS and exemplary practices for teaching English Learners will be fully implemented in all classrooms to provide access to rigorous course of study and maximum learning opportunities for all English Learners.

Identified Need

State indicators and local evaluation confirm that Ducor English Learners have made great strides in acquisition of English Language literacy skills as demonstrated by their performance above their statewide peers in English Language Arts. However, there is still room to grow.

Annual Measurable Outcomes

Metric/Indicator	Baseline/Actual Outcome	Expected Outcome
EL Progress	50.6% making progress	60.6% (+10%) making progress
ELA SBAC DF3 EL	-78.8	-58.8 (+20)
Math SBAC DF3 EL	-127.5	-107.5 (+20)

Complete a copy of the Strategy/Activity table for each of the school's strategies/activities. Duplicate the table, including Proposed Expenditures, as needed.

Strategy/Activity 1

Students to be Served by this Strategy/Activity
(Identify either All Students or one or more specific student groups)

- 2.1 English Learners) Provide continuing support and training through TCOE for ELD implementation
- 2.2 (English Learners) Provide support and training to deploy exemplary strategies for EL students and differentiated learning levels (Lesson Plans and Unit Plans) TCOE
- 2.3 (English Learners) Provide an evidence-based program of support and intervention for English Learners to assure they attain proficiency in academic English language and success in the broad course of study. This will include certificated support staff who provide direct instruction as well as mentoring and coaching for classroom teachers and supplemental materials to support differentiation of instruction for English Learners

Strategy/Activity

See above

Proposed Expenditures for this Strategy/Activity

List the amount(s) and funding source(s) for the proposed expenditures. Specify the funding source(s) using one or more of the following: LCFF, Federal (if Federal identify the Title and Part, as applicable), Other State, and/or Local.

Amount(s)	Source(s)
2.1 \$2,000	Title I
2.2 \$2,000	Title I
2.3 \$9,509	Title III

Goal 3

Develop new and improved existing parent and school partnership with teachers and to involve parents in our student's future learning through support and ideas at home that will transfer to our school environment.

Identified Need

It is not a coincidence that English Learner achievement at Ducor School is increasing at a pace consistent with increasing parent involvement. Research confirms local evaluation that involved parents means involved students who have higher academic achievement. To respond to the need for every parent to be actively involved in their child's education and to take an active role in the decision-making processes at the school and district. Ducor will continue successful efforts and seek out and deploy proven successful strategies.

Annual Measurable Outcomes

Metric/Indicator	Baseline/Actual Outcome	Expected Outcome
Availability of parent training/involvement opportunities in school and district decision-making subgroups	40	45
Parent involvement in decision-making of unduplicated count students and of students with exceptional needs	60%	-65%

Complete a copy of the Strategy/Activity table for each of the school's strategies/activities. Duplicate the table, including Proposed Expenditures, as needed.

Strategy/Activity 1

Students to be Served by this Strategy/Activity

(Identify either All Students or one or more specific student groups)

3.1 (SPED) In collaboration with SELPA, provide training for teachers on the IEP process and how to collaborate with parents in IEP meetings

3.2 (SPED) In collaboration with SELPA, provide training to parents of students identified as having special needs on IEP strategies and how to monitor and help their children at home.

Strategy/Activity

See above

Proposed Expenditures for this Strategy/Activity

List the amount(s) and funding source(s) for the proposed expenditures. Specify the funding source(s) using one or more of the following: LCFF, Federal (if Federal identify the Title and Part, as applicable), Other State, and/or Local.

Amount(s)

Source(s)

3.1 \$0

LCFF Base

3.2 \$0

LCFF Base

Annual Review

SPSA Year Reviewed: 2019-20

Respond to the following prompts relative to this goal. If the school is in the first year of implementing the goal, an analysis is not required and this section may be deleted.

ANALYSIS

Describe the overall implementation of the strategies/activities and the overall effectiveness of the strategies/activities to achieve the articulated goal.

N/A – District had an LCAP in lieu of SPSA

Briefly describe any major differences between the intended implementation and/or the budgeted expenditures to implement the strategies/activities to meet the articulated goal.

N/A – District had an LCAP in lieu of SPSA

Describe any changes that will be made to this goal, the annual outcomes, metrics, or strategies/activities to achieve this goal as a result of this analysis. Identify where those changes can be found in the SPSA.

N/A – District had an LCAP in lieu of SPSA

Budget Summary

Complete the table below. Schools may include additional information. Adjust the table as needed. The Budget Summary is required for schools funded through the ConApp, and/or that receive funds from the LEA for Comprehensive Support and Improvement (CSI).

Budget Summary

DESCRIPTION

AMOUNT

Total Funds Provided to the School Through the Consolidated Application

\$ [Enter amount here]

Total Federal Funds Provided to the School from the LEA for CSI

\$ 170,123

Total Funds Budgeted for Strategies to Meet the Goals in the SPSA

\$ [Enter amount here]

Other Federal, State, and Local Funds

List the additional Federal programs that the school is including in the schoolwide program. Adjust the table as needed. If the school is not operating a Title I schoolwide program this section is not applicable and may be deleted.

Federal Programs	Allocation (\$)
[List federal program here]	\$(Enter amount here)
[List federal program here]	\$(Enter amount here)
[List federal program here]	\$(Enter amount here)
[List federal program here]	\$(Enter amount here)
[List federal program here]	\$(Enter amount here)

Subtotal of additional federal funds included for this school: \$ [Enter federal funds subtotal here]

List the State and local programs that the school is including in the schoolwide program. Duplicate the table as needed.

State or Local Programs	Allocation (\$)
[List state or local program here]	\$(Enter amount here)
[List state or local program here]	\$(Enter amount here)
[List state or local program here]	\$(Enter amount here)
[List state or local program here]	\$(Enter amount here)
[List state or local program here]	\$(Enter amount here)

Subtotal of state or local funds included for this school: \$ [Enter state or local funds subtotal here]

Total of federal, state, and/or local funds for this school: \$(Enter total funds here)

Instructions

The School Plan for Student Achievement (SPSA) is a strategic plan that maximizes the resources available to the school while minimizing duplication of effort with the ultimate goal of increasing student achievement. SPSA development should be aligned with and inform the Local Control and Accountability Plan process.

The SPSA consolidates all school-level planning efforts into one plan for programs funded through the consolidated application (ConApp), and for federal school improvement programs, including schoolwide programs, Comprehensive Support and Improvement (CSI), Targeted Support and Improvement (TSI), and Additional Targeted Support and Improvement (ATSI), pursuant to California *Education Code (EC)* Section 64001 and the Elementary and Secondary Education Act as amended by the Every Student Succeeds Act (ESSA). This template is designed to meet schoolwide program planning requirements. It also notes how to meet CSI, TSI, or ATSI requirements, as applicable.

California's ESSA State Plan supports the state's approach to improving student group performance through the utilization of federal resources. Schools use the SPSA to document their approach to maximizing the impact of federal investments in support of underserved students. The implementation of ESSA in California presents an opportunity for schools to innovate with their federally-funded programs and align them with the priority goals of the school and the LEA that are being realized under the state's Local Control Funding Formula (LCFF).

The LCFF provides schools and LEAs flexibility to design programs and provide services that meet the needs of students in order to achieve readiness for college, career, and lifelong learning. The SPSA planning process supports continuous cycles of action, reflection, and improvement. Consistent with *EC* 65001, the Schoolsite Council (SSC) is required to develop and annually review the SPSA, establish an annual budget, and make modifications to the plan that reflect changing needs and priorities, as applicable.

For questions related to specific sections of the template, please see instructions below:

Instructions: Table of Contents

The SPSA template meets the requirements of schoolwide planning (SWP). Each section also contains a notation of how to meet CSI, TSI, or ATSI requirements.

Stakeholder Involvement

Goals, Strategies, & Proposed Expenditures

Planned Strategies/Activities

Annual Review and Update

Budget Summary

Appendix A: Plan Requirements for Title I Schoolwide Programs

Appendix B: Plan Requirements for Schools to Meet Federal School Improvement Planning Requirements

Appendix C: Select State and Federal Programs

For additional questions or technical assistance related to LEA and school planning, please contact the Local Agency Systems Support Office, at LCFF@cde.ca.gov.

For programmatic or policy questions regarding Title I schoolwide planning, please contact the local educational agency, or the CDE's Federal Programs and Reporting Office at TITLEI@cde.ca.gov.

For questions or technical assistance related to meeting federal school improvement planning requirements (for CSI, TSI, and ATSI), please contact the CDE's School Improvement and Support Office at SISO@cde.ca.gov.

Purpose and Description

Schools identified for Comprehensive Support and Improvement (CSI), Targeted Support and Improvement (TSI), or Additional Targeted Support and Improvement (ATSI) must respond to the following prompts. A school that has not been identified for CSI, TSI, or ATSI may delete the Purpose and Description prompts.

Purpose

Briefly describe the purpose of this plan by selecting from Schoolwide Program, Comprehensive Support and Improvement, Targeted Support and Improvement, or Additional Targeted Support and Improvement)

Description

Briefly describe the school's plan for effectively meeting ESSA requirements in alignment with the Local Control and Accountability Plan and other federal, state, and local programs.

Stakeholder Involvement

Meaningful involvement of parents, students, and other stakeholders is critical to the development of the SPSA and the budget process. Schools must share the SPSA with school site-level advisory groups, as applicable (e.g., English Learner Advisory committee, student advisory groups, tribes and School Plan for Student Achievement Instructions| Page 12 of 6

tribal organizations present in the community, as appropriate, etc.) and seek input from these advisory groups in the development of the SPSA.

The Stakeholder Engagement process is an ongoing, annual process. Describe the process used to involve advisory committees, parents, students, school faculty and staff, and the community in the development of the SPSA and the annual review and update.

[This section meets the requirements for TSI and ATSI.]

[When completing this section for CSI, the LEA shall describe the process used to develop, in partnership with stakeholders, the CSI plan.]

Resource Inequities

Schools eligible for CSI or ATSI must identify resource inequities, which may include a review of LEA- and school-level budgeting as a part of the required needs assessment. Identified resource inequities must be addressed through implementation of the CSI or ATSI plan. Briefly identify and describe any resource inequities identified as a result of the required needs assessment and summarize how the identified resource inequities are addressed in the SPSA.

[This section meets the requirements for CSI and ATSI. If the school is not identified for CSI or ATSI this section is not applicable and may be deleted.]

Goals, Strategies, Expenditures, & Annual Review

In this section a school provides a description of the annual goals to be achieved by the school. This section also includes descriptions of the specific planned strategies/activities a school will take to meet the identified goals, and a description of the expenditures required to implement the specific strategies and activities.

Goal

State the goal. A goal is a broad statement that describes the desired result to which all strategies/activities are directed. A goal answers the question: What is the school seeking to achieve?

It can be helpful to use a framework for writing goals such as the S.M.A.R.T. approach. A S.M.A.R.T. goal is one that is **S**pecific, **M**asurable, **A**chievable, **R**ealistic, and **T**ime-bound. A level of specificity is needed in order to measure performance relative to the goal as well as to assess whether it is reasonably achievable. Including time constraints, such as milestone dates, ensures a realistic approach that supports student success.

A school may number the goals using the "Goal #" for ease of reference.

[When completing this section for CSI, TSI, and ATSI, improvement goals shall align to the goals, actions, and services in the LEA LCAP.]

Identified Need

Describe the basis for establishing the goal. The goal should be based upon an analysis of verifiable state data, including local and state indicator data from the California School Dashboard (Dashboard) and data from the School Accountability Report Card, including local data voluntarily collected by districts to measure pupil achievement.

[Completing this section fully addresses all relevant federal planning requirements]

Annual Measurable Outcomes

Identify the metric(s) and/or state indicator(s) that the school will use as a means of evaluating progress toward accomplishing the goal. A school may identify metrics for specific student groups. Include in the baseline column the most recent data associated with the metric or indicator available at the time of adoption of the SPSA. The most recent data associated with a metric or indicator includes data reported in the annual update of the SPSA. In the subsequent Expected Outcome column, identify the progress the school intends to make in the coming year.

[When completing this section for CSI the school must include school-level metrics related to the metrics that led to the school's identification.]

[When completing this section for TSI/ATSI the school must include metrics related to the specific student group(s) that led to the school's identification.]

Strategies/Activities

Describe the strategies and activities being provided to meet the described goal. A school may number the strategy/activity using the "Strategy/Activity #" for ease of reference.

Planned strategies/activities address the findings of the needs assessment consistent with state priorities and resource inequities, which may have been identified through a review of the local educational agency's budgeting, its local control and accountability plan, and school-level budgeting, if applicable.

[When completing this section for CSI, TSI, and ATSI, this plan shall include evidence-based interventions and align to the goals, actions, and services in the LEA LCAP.]

[When completing this section for CSI and ATSI, this plan shall address through implementation, identified resource inequities, which may have been identified through a review of LEA- and school-level budgeting.]

Students to be Served by this Strategy/Activity

Indicate in this box which students will benefit from the strategies/activities by indicating "All Students" or listing one or more specific student group(s) to be served.

[This section meets the requirements for CSI.]

[When completing this section for TSI and ATSI, at a minimum, the student groups to be served shall include the student groups that are consistently underperforming, for which the school received the TSI or ATSI designation. For TSI, a school may focus on all students or the student group(s) that led to identification based on the evidence-based interventions selected.]

Proposed Expenditures for this Strategy/Activity

For each strategy/activity, list the amount(s) and funding source(s) for the proposed expenditures for the school year to implement these strategies/activities. Specify the funding source(s) using one or more of the following: LCFF, Federal (if Federal, identify the Title and Part, as applicable), Other State, and/or Local.

Proposed expenditures that are included more than once in a SPSA should be indicated as a duplicated expenditure and include a reference to the goal and strategy/activity where the

expenditure first appears in the SPSA. Pursuant to Education Code, Section 64001(g)(3)(C), proposed expenditures, based on the projected resource allocation from the governing board or governing body of the LEA, to address the findings of the needs assessment consistent with the state priorities including identifying resource inequities which may include a review of the LEA's budgeting, its LCAP, and school-level budgeting, if applicable.

[This section meets the requirements for CSI, TSI, and ATSI.]

[NOTE: Federal funds for CSI shall not be used in schools identified for TSI or ATSI. In addition, funds for CSI shall not be used to hire additional permanent staff.]

Annual Review

In the following Analysis prompts, identify any material differences between what was planned and what actually occurred as well as significant changes in strategies/activities and/ or expenditures from the prior year. This annual review and analysis should be the basis for decision-making and updates to the plan.

Analysis

Using actual outcome data, including state indicator data from the Dashboard, analyze whether the planned strategies/activities were effective in achieving the goal. Respond to the prompts as instructed. Respond to the following prompts relative to this goal. If the school is in the first year of implementing the goal the Annual Review section is not required and this section may be deleted.

- Describe the overall implementation of the strategies/activities and the overall effectiveness of the strategies/activities to achieve the articulated goal.
- Briefly describe any major differences between either/or the intended implementation or the budgeted expenditures to implement the strategies/activities to meet the articulated goal.
- Describe any changes that will be made to the goal, expected annual measurable outcomes, metrics/indicators, or strategies/activities to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard, as applicable. Identify where those changes can be found in the SPSA.

[When completing this section for CSI, TSI, or ATSI, any changes made to the goals, annual measurable outcomes, metrics/indicators, or strategies/activities, shall meet the CSI, TSI, or ATSI planning requirements. CSI, TSI, and ATSI planning requirements are listed under each section of the Instructions. For example, as a result of the Annual Review and Update, if changes are made to a goal(s), see the Goal section for CSI, TSI, and ATSI planning requirements.]

Budget Summary

In this section a school provides a brief summary of the funding allocated to the school through the ConApp and/or other funding sources as well as the total amount of funds for proposed expenditures described in the SPSA. The Budget Summary is required for schools funded through the ConApp and that receive federal funds for CSI. If the school is not operating a Title I schoolwide program this section is not applicable and may be deleted.

From its total allocation for CSI, the LEA may distribute funds across its schools that meet the criteria for CSI to support implementation of this plan. In addition, the LEA may retain a portion of its total allocation to support LEA-level expenditures that are directly related to serving schools eligible for CSI.

Budget Summary

A school receiving funds allocated through the ConApp should complete the Budget Summary as follows:

- **Total Funds Provided to the School Through the Consolidated Application:** This amount is the total amount of funding provided to the school through the ConApp for the school year. The school year means the fiscal year for which a SPSA is adopted or updated.
- **Total Funds Budgeted for Strategies to Meet the Goals in the SPSA:** This amount is the total of the proposed expenditures from all sources of funds associated with the strategies/activities reflected in the SPSA. To the extent strategies/activities and/or proposed expenditures are listed in the SPSA under more than one goal, the expenditures should be counted only once.

A school receiving federal funds for CSI should complete the Budget Summary as follows:

- **Total Federal Funds Provided to the School from the LEA for CSI:** This amount is the total amount of funding provided to the school from the LEA.

[NOTE: Federal funds for CSI shall not be used in schools eligible for TSI or ATSI. In addition, funds for CSI shall not be used to hire additional permanent staff.]

Appendix A: Plan Requirements

Schoolwide Program Requirements

This School Plan for Student Achievement (SPSA) template meets the requirements of a schoolwide program plan. The requirements below are for planning reference.

A school that operates a schoolwide program and receives funds allocated through the ConApp is required to develop a SPSA. The SPSA, including proposed expenditures of funds allocated to the school through the ConApp, must be reviewed annually and updated by the SSC. The content of a SPSA must be aligned with school goals for improving student achievement.

Requirements for Development of the Plan

- I. The development of the SPSA shall include both of the following actions:
 - A. Administration of a comprehensive needs assessment that forms the basis of the school's goals contained in the SPSA.
 1. The comprehensive needs assessment of the entire school shall:
 - a. Include an analysis of verifiable state data, consistent with all state priorities as noted in Sections 52060 and 52066, and informed by all indicators described in Section 1111(c)(4)(B) of the federal Every Student Succeeds Act, including pupil performance against state-determined long-term goals. The school may include data voluntarily developed by districts to measure pupil outcomes (described in the Identified Need); and
 - b. Be based on academic achievement information about all students in the school, including all groups under §200.13(b)(7) and migratory children as defined in section 1309(2) of the ESEA, relative to the State's academic standards under §200.1 to—
 - i. Help the school understand the subjects and skills for which teaching and learning need to be improved; and
 - ii. Identify the specific academic needs of students and groups of students who are not yet achieving the State's academic standards; and
 - iii. Assess the needs of the school relative to each of the components of the schoolwide program under §200.28.
 - iv. Develop the comprehensive needs assessment with the participation of individuals who will carry out the schoolwide program plan.
 - v. Document how it conducted the needs assessment, the results it obtained, and the conclusions it drew from those results.
 - B. Identification of the process for evaluating and monitoring the implementation of the SPSA and progress towards accomplishing the goals set forth in the SPSA (described in the Expected Annual Measurable Outcomes and Annual Review and Update).

Requirements for the Plan

- II. The SPSA shall include the following:

- A. Goals set to improve pupil outcomes, including addressing the needs of student groups as identified through the needs assessment.
- B. Evidence-based strategies, actions, or services (described in Strategies and Activities)
 - 1. A description of the strategies that the school will be implementing to address school needs, including a description of how such strategies will--
 - a. provide opportunities for all children including each of the subgroups of students to meet the challenging state academic standards
 - b. use methods and instructional strategies that:
 - i. strengthen the academic program in the school,
 - ii. increase the amount and quality of learning time, and
 - iii. provide an enriched and accelerated curriculum, which may include programs, activities, and courses necessary to provide a well-rounded education.
 - c. Address the needs of all children in the school, but particularly the needs of those at risk of not meeting the challenging State academic standards, so that all students demonstrate at least proficiency on the State's academic standards through activities which may include:
 - i. strategies to improve students' skills outside the academic subject areas;
 - ii. preparation for and awareness of opportunities for postsecondary education and the workforce;
 - iii. implementation of a schoolwide tiered model to prevent and address problem behavior;
 - iv. professional development and other activities for teachers, paraprofessionals, and other school personnel to improve instruction and use of data; and
 - v. strategies for assisting preschool children in the transition from early childhood education programs to local elementary school programs.
- C. Proposed expenditures, based on the projected resource allocation from the governing board or body of the local educational agency (may include funds allocated via the ConApp, federal funds for CSI, any other state or local funds allocated to the school), to address the findings of the needs assessment consistent with the state priorities, including identifying resource inequities, which may include a review of the LEAs budgeting, it's LCAP, and school-level budgeting, if applicable (described in Proposed Expenditures and Budget Summary). Employees of the schoolwide program may be deemed funded by a single cost objective.
- D. A description of how the school will determine if school needs have been met (described in the Expected Annual Measurable Outcomes and the Annual Review and Update).
 - 1. Annually evaluate the implementation of, and results achieved by, the schoolwide program, using data from the State's annual assessments and other indicators of academic achievement;
 - 2. Determine whether the schoolwide program has been effective in increasing the achievement of students in meeting the State's academic standards, particularly for those students who had been furthest from achieving the standards; and

3. Revise the plan, as necessary, based on the results of the evaluation, to ensure continuous improvement of students in the schoolwide program.
- E. A description of how the school will ensure parental involvement in the planning, review, and improvement of the schoolwide program plan (described in Stakeholder Involvement and/or Strategies/Activities).
 - F. A description of the activities the school will include to ensure that students who experience difficulty attaining proficient or advanced levels of academic achievement standards will be provided with effective, timely additional support, including measures to
 - 1. Ensure that those students' difficulties are identified on a timely basis; and
 - 2. Provide sufficient information on which to base effective assistance to those students.
 - G. For an elementary school, a description of how the school will assist preschool students in the successful transition from early childhood programs to the school.
 - H. A description of how the school will use resources to carry out these components (described in the Proposed Expenditures for Strategies/Activities).
 - I. A description of any other activities and objectives as established by the SSC (described in the Strategies/Activities).

Authority Cited: S Title 34 of the Code of Federal Regulations (34 CFR), sections 200.25-26, and 200.29, and sections-1114(b)(7)(A)(i)-(iii) and 1118(b) of the ESEA. *EC* sections 6400 et. seq.

Appendix B:

Plan Requirements for School to Meet Federal School Improvement Planning Requirements

For questions or technical assistance related to meeting Federal School Improvement Planning Requirements, please contact the CDE's School Improvement and Support Office at SISO@cde.ca.gov.

Comprehensive Support and Improvement

The LEA shall, in partnership with stakeholders (including principals and other school leaders, teachers, and parents), locally develop and implement the CSI plan for the school to improve student outcomes, and specifically address the metrics that led to eligibility for CSI (Stakeholder Involvement).

The CSI plan shall:

1. Be informed by all state indicators, including student performance against state-determined long-term goals (Goal, Identified Need, Expected Annual Measurable Outcomes, Annual Review and Update, as applicable);
2. Include evidence-based interventions (Strategies/Activities, Annual Review and Update, as applicable) (For resources related to evidence-based interventions, see the U.S. Department of Education's "Using Evidence to Strengthen Education Investments" at <https://www2.ed.gov/policy/elsec/leg/essa/guidanceuseseseinvestment.pdf>);
3. Be based on a school-level needs assessment (Goal, Identified Need, Expected Annual Measurable Outcomes, Annual Review and Update, as applicable); and
4. Identify resource inequities, which may include a review of LEA- and school-level budgeting, to be addressed through implementation of the CSI plan (Goal, Identified Need, Expected Annual Measurable Outcomes, Planned Strategies/Activities; and Annual Review and Update, as applicable).

Authority Cited: Sections 1003(e)(1)(A), 1003(i), 1111(c)(4)(B), and 1111(d)(1) of the ESSA.

Targeted Support and Improvement

In partnership with stakeholders (including principals and other school leaders, teachers, and parents) the school shall develop and implement a school-level TSI plan to improve student outcomes for each subgroup of students that was the subject of identification (Stakeholder Involvement).

The TSI plan shall:

1. Be informed by all state indicators, including student performance against state-determined long-term goals (Goal, Identified Need, Expected Annual Measurable Outcomes, Annual Review and Update, as applicable); and
2. Include evidence-based interventions (Planned Strategies/Activities, Annual Review and Update, as applicable). (For resources related to evidence-based interventions, see the U.S. Department of Education's "Using Evidence to Strengthen Education Investments" <https://www2.ed.gov/policy/elsec/leg/essa/guidanceuseseseinvestment.pdf>.)

Authority Cited: Sections 1003(e)(1)(B), 1003(i), 1111(c)(4)(B) and 1111(d)(2) of the ESSA.

Additional Targeted Support and Improvement

A school identified for ATSI shall:

1. Identify resource inequities, which may include a review of LEA- and school-level budgeting, which will be addressed through implementation of its TSI plan (Goal, Identified Need, Expected Annual Measurable Outcomes, Planned Strategies/Activities, and Annual Review and Update, as applicable).

Authority Cited: Sections 1003(e)(1)(B), 1003(i), 1111(c)(4)(B), and 1111(d)(2)(c) of the ESSA.

Single School Districts and Charter Schools Identified for School Improvement

Single school districts (SSDs) or charter schools that are identified for CSI, TSI, or ATSI, shall develop a SPSA that addresses the applicable requirements above as a condition of receiving funds (EC Section 64001[a] as amended by Assembly Bill [AB] 716, effective January 1, 2019).

However, a SSD or a charter school may streamline the process by combining state and federal requirements into one document which may include the local control and accountability plan (LCAP) and all federal planning requirements, provided that the combined plan is able to demonstrate that the legal requirements for each of the plans is met (EC Section 52062[a] as amended by AB 716, effective January 1, 2019).

Planning requirements for single school districts and charter schools choosing to exercise this option are available in the LCAP Instructions.

Authority Cited: EC sections 52062(a) and 64001(a), both as amended by AB 716, effective January 1, 2019.

Appendix C: Select State and Federal Programs

For a list of active programs, please see the following links:

Programs included on the Consolidated Application: <https://www.cde.ca.gov/fg/aa/co/>

ESSA Title I, Part A: School Improvement: <https://www.cde.ca.gov/sp/sw/t1/schoolsupport.asp>

Available Funding: <https://www.cde.ca.gov/fg/fo/af/>

Developed by the California Department of Education, January 2019

T & T

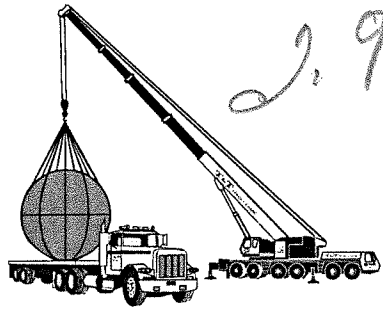
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fx: 805. 648.1185

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1600 JAMES RD.
ph: 661. 393.0795
fx: 661. 393.8648

PORT HUENEME
ph: 805. 488.4475

GOLETA
ph: 805. 967.3777

MAILING ADDRESS
P.O. BOX 1748
VENTURA, CA 93002

Ducor School AVE. 56 - Ducor CA
Isidro Rodriguez
superintendent@ducor.k12.ca.us

Isidro,

Here is the estimate based on a 6 hour day port to port for furnishing our 115 Ton Crane at 90 Ton Rate with CWT Truck and Truck transporting 32ft. and 2 - 12ft Spreader Bars to Ducor School and relocating a 30ft x 30ft Carport @ 100ft radius.

Estimate based on a 6 hour day for above listed equipment - \$4,065.00

Overtime applies Monday through Friday before 6:00am and after 5:00pm and/or to time in excess of eight (8) hours or on Saturday. Over 12 Hours, and Sunday rate is additional per hour.
This is an estimate only, actual time will be billed.

T & T Truck & Crane Service cannot assume any liability for damages to asphalt or concrete areas that equipment must travel and set-up on. However, we will provide adequate plates, matting, and cribbing to protect areas under all of the crane outriggers.

Thank you again for this opportunity and I certainly hope to work with you on this project. If you should have any questions please do not hesitate to contact me at 661.912.6634

With sincere regards,

Bryan Smith

Salesman

T & T Truck & Crane Service

2.10



Invoice No.

Date: 1/4/2021

Customer: Ducor School

Job Address: 23761 Ave 56

Zeke Jaggers (559)310-7277

864 S.F. @ \$5.30 / S.F.	\$ 4,579.20	
Includes: - 4" thick concrete 3,000 PSI		
- 3/8" rebar 2' on center		
- control joints		
- broom finish		
- set up/ take down		
- tractor work		
- clean up		
91 Ft of stem wall @ \$10 / Ft.	\$ 910	
Includes: - 6" wide x 6" deep		
- Finish tops and inside stem wall		
- 3/8" rebar through out stem wall		
- set up / take down		
- extra lumber fee		
Demo 120 S.F. @ \$4 / S.F.	\$ 480	
Includes: - break out & haul off		
- clean up		
Total	\$ 5,969.20	

Let me know if you have any questions. Thank you Isidro.

Zeke Jaggers

STATEMENT OF ECONOMIC INTERESTS

301
Date Initial Filing Received
Filing Official Use Only

COVER PAGE

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

Division, Board, Department, District, if applicable Your Position

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: Position:

2. Jurisdiction of Office (Check at least one box)

- ☐ State ☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)
- ☐ Multi-County ☐ County of
- ☐ City of ☐ Other

3. Type of Statement (Check at least one box)

- ☐ **Annual:** The period covered is January 1, 2020, through December 31, 2020.
- or-**
- The period covered is / / , through December 31, 2020.
- ☐ **Leaving Office:** Date Left / / (Check one circle.)
- ☐ The period covered is January 1, 2020, through the date of leaving office.
- or-**
- ☐ The period covered is / / , through the date of leaving office.
- ☐ **Assuming Office:** Date assumed / /
- ☐ **Candidate:** Date of Election and office sought, if different than Part 1:

4. Schedule Summary (must complete) ► Total number of pages including this cover page:

Schedules attached

- ☐ **Schedule A-1 - Investments** – schedule attached ☐ **Schedule C - Income, Loans, & Business Positions** – schedule attached
- ☐ **Schedule A-2 - Investments** – schedule attached ☐ **Schedule D - Income – Gifts** – schedule attached
- ☐ **Schedule B - Real Property** – schedule attached ☐ **Schedule E - Income – Gifts – Travel Payments** – schedule attached

-or-

☐ **None - No reportable interests on any schedule**

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
(Business or Agency Address Recommended - Public Document)

DAYTIME TELEPHONE NUMBER E-MAIL ADDRESS
()

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed (month, day, year)

Signature (File the originally signed paper statement with your filing official.)

Instructions

Cover Page

Enter your name, mailing address, and daytime telephone number in the spaces provided. **Because the Form 700 is a public document, you may list your business/office address instead of your home address.**

Part 1. Office, Agency, or Court

- Enter the name of the office sought or held, or the agency or court. Consultants must enter the public agency name rather than their private firm's name. (Examples: State Assembly; Board of Supervisors; Office of the Mayor; Department of Finance; Hope County Superior Court)
- Indicate the name of your division, board, or district, if applicable. (Examples: Division of Waste Management; Board of Accountancy; District 45). **Do not use acronyms.**
- Enter your position title. (Examples: Director; Chief Counsel; City Council Member; Staff Services Analyst)
- If you hold multiple positions (i.e., a city council member who also is a member of a county board or commission), you may be required to file statements with each agency. To simplify your filing obligations, you may complete an expanded statement.
- To do this, enter the name of the other agency(ies) with which you are required to file and your position title(s) in the space provided. **Do not use acronyms.** Attach an additional sheet if necessary. Complete one statement covering the disclosure requirements for all positions. Each copy must contain an original signature. Therefore, before signing the statement, make a copy for each agency. Sign each copy with an original signature and file with each agency.

If you assume or leave a position after a filing deadline, you must complete a separate statement. For example, a city council member who assumes a position with a county special district after the April 1 annual filing deadline must file a separate assuming office statement. In subsequent years, the city council member may expand his or her annual filing to include both positions.

Example:

Brian Bourne is a city council member for the City of Lincoln and a board member for the Camp Far West Irrigation District – a multi-county agency that covers Placer and Yuba counties. Brian will complete one Form 700 using full disclosure (as required for the city position) and covering interests in both Placer and Yuba counties (as required for the multi-county position) and list both positions on the Cover Page. Before signing the statement, Brian will make a copy and sign both statements. One statement will be filed with City of Lincoln and the other will be filed with Camp Far West Irrigation District. Both will contain an original signature.

Part 2. Jurisdiction of Office

- Check the box indicating the jurisdiction of your agency and, if applicable, identify the jurisdiction. Judges, judicial candidates, and court commissioners have statewide jurisdiction. All other filers should review the Reference Pamphlet, page 13, to determine their jurisdiction.

- If your agency is a multi-county office, list each county in which your agency has jurisdiction.
- If your agency is not a state office, court, county office, city office, or multi-county office (e.g., school districts, special districts and JPAs), check the "other" box and enter the county or city in which the agency has jurisdiction.

Example:

This filer is a member of a water district board with jurisdiction in portions of Yuba and Sutter Counties.

1. Office, Agency, or Court	
Agency Name (Do not use acronyms) Feather River Irrigation District	
Division, Board, Department, District, if applicable N/A	Your Position Board Member
► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)	
Agency: N/A	Position:
2. Jurisdiction of Office (Check at least one box)	
<input type="checkbox"/> State	<input type="checkbox"/> Judge or Court Commissioner (Statewide Jurisdiction)
<input checked="" type="checkbox"/> Multi-County Yuba & Sutter Counties	<input type="checkbox"/> County of
<input type="checkbox"/> City of	<input type="checkbox"/> Other

Part 3. Type of Statement

Check at least one box. The period covered by a statement is determined by the type of statement you are filing. If you are completing a 2020 annual statement, **do not** change the pre-printed dates to reflect 2021. Your annual statement is used for reporting the **previous year's** economic interests. Economic interests for your annual filing covering January 1, 2021, through December 31, 2021, will be disclosed on your statement filed in 2022. See Reference Pamphlet, page 4.

Combining Statements: Certain types of statements may be combined. For example, if you leave office after January 1, but before the deadline for filing your annual statement, you may combine your annual and leaving office statements. File by the earliest deadline. Consult your filing officer or the FPPC.

Part 4. Schedule Summary

- Complete the Schedule Summary after you have reviewed each schedule to determine if you have reportable interests.
- Enter the total number of completed pages including the cover page and either check the box for each schedule you use to disclose interests; **or** if you have nothing to disclose on any schedule, check the "No reportable interests" box. Please **do not** attach any blank schedules.

Part 5. Verification

Complete the verification by signing the statement and entering the date signed. All statements must have an original "wet" signature or be duly authorized by your filing officer to file electronically under Government Code Section 87500.2. **When you sign your statement, you are stating, under penalty of perjury, that it is true and correct.** Only the filer has authority to sign the statement. An unsigned statement is not considered filed and you may be subject to late filing penalties.

SCHEDULE A-1
Investments
Stocks, Bonds, and Other Interests
(Ownership Interest is Less Than 10%)



Investments must be itemized.

Do not attach brokerage or financial statements.

<p>► NAME OF BUSINESS ENTITY _____</p> <p>GENERAL DESCRIPTION OF THIS BUSINESS _____</p> <p>FAIR MARKET VALUE</p> <table style="width: 100%;"><tr><td><input type="checkbox"/> \$2,000 - \$10,000</td><td><input type="checkbox"/> \$10,001 - \$100,000</td></tr><tr><td><input type="checkbox"/> \$100,001 - \$1,000,000</td><td><input type="checkbox"/> Over \$1,000,000</td></tr></table> <p>NATURE OF INVESTMENT</p> <p><input type="checkbox"/> Stock <input type="checkbox"/> Other _____ (Describe)</p> <p><input type="checkbox"/> Partnership <input type="radio"/> Income Received of \$0 - \$499</p> <p style="margin-left: 150px;"><input type="radio"/> Income Received of \$500 or More (Report on Schedule C)</p> <p>IF APPLICABLE, LIST DATE:</p> <table style="width: 100%;"><tr><td style="text-align: center;">____/____/20</td><td style="text-align: center;">____/____/20</td></tr><tr><td style="text-align: center;">ACQUIRED</td><td style="text-align: center;">DISPOSED</td></tr></table>	<input type="checkbox"/> \$2,000 - \$10,000	<input type="checkbox"/> \$10,001 - \$100,000	<input type="checkbox"/> \$100,001 - \$1,000,000	<input type="checkbox"/> Over \$1,000,000	____/____/20	____/____/20	ACQUIRED	DISPOSED	<p>► NAME OF BUSINESS ENTITY _____</p> <p>GENERAL DESCRIPTION OF THIS BUSINESS _____</p> <p>FAIR MARKET VALUE</p> <table style="width: 100%;"><tr><td><input type="checkbox"/> \$2,000 - \$10,000</td><td><input type="checkbox"/> \$10,001 - \$100,000</td></tr><tr><td><input type="checkbox"/> \$100,001 - \$1,000,000</td><td><input type="checkbox"/> Over \$1,000,000</td></tr></table> <p>NATURE OF INVESTMENT</p> <p><input type="checkbox"/> Stock <input type="checkbox"/> Other _____ (Describe)</p> <p><input type="checkbox"/> Partnership <input type="radio"/> Income Received of \$0 - \$499</p> <p style="margin-left: 150px;"><input type="radio"/> Income Received of \$500 or More (Report on Schedule C)</p> <p>IF APPLICABLE, LIST DATE:</p> <table style="width: 100%;"><tr><td style="text-align: center;">____/____/20</td><td style="text-align: center;">____/____/20</td></tr><tr><td style="text-align: center;">ACQUIRED</td><td style="text-align: center;">DISPOSED</td></tr></table>	<input type="checkbox"/> \$2,000 - \$10,000	<input type="checkbox"/> \$10,001 - \$100,000	<input type="checkbox"/> \$100,001 - \$1,000,000	<input type="checkbox"/> Over \$1,000,000	____/____/20	____/____/20	ACQUIRED	DISPOSED
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<input type="checkbox"/> \$2,000 - \$10,000	<input type="checkbox"/> \$10,001 - \$100,000																
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____/____/20	____/____/20																
ACQUIRED	DISPOSED																

Instructions – Schedules A-1 and A-2 Investments

"Investment" means a financial interest in any business entity (including a consulting business or other independent contracting business) that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency's jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more at any time during the reporting period. See Reference Pamphlet, page 13.

Reportable investments include:

- Stocks, bonds, warrants, and options, including those held in margin or brokerage accounts and managed investment funds (See Reference Pamphlet, page 13.)
- Sole proprietorships
- Your own business or your spouse's or registered domestic partner's business (See Reference Pamphlet, page 8, for the definition of "business entity.")
- Your spouse's or registered domestic partner's investments even if they are legally separate property
- Partnerships (e.g., a law firm or family farm)
- Investments in reportable business entities held in a retirement account (See Reference Pamphlet, page 15.)
- If you, your spouse or registered domestic partner, and dependent children together have a 10% or greater ownership interest in a business entity or trust (including a living trust), you must disclose investments held by the business entity or trust. See Reference Pamphlet, page 15, for more information on disclosing trusts.
- Business trusts

You are not required to disclose:

- Government bonds, diversified mutual funds, certain funds similar to diversified mutual funds (such as exchange traded funds) and investments held in certain retirement accounts. See Reference Pamphlet, page 13, for detailed information. (Regulation 18237)
- Bank accounts, savings accounts, money market accounts and certificates of deposits
- Insurance policies
- Annuities
- Commodities
- Shares in a credit union
- Government bonds (including municipal bonds)
- Retirement accounts invested in non-reportable interests (e.g., insurance policies, mutual funds, or government bonds) (See Reference Pamphlet, page 15.)

- Government defined-benefit pension plans (such as CalPERS and CalSTRS plans)
- Certain interests held in a blind trust (See Reference Pamphlet, page 16.)

Use Schedule A-1 to report ownership of less than 10% (e.g., stock). Schedule C (Income) may also be required if the investment is not a stock or corporate bond. See second example below.

Use Schedule A-2 to report ownership of 10% or greater (e.g., a sole proprietorship).

To Complete Schedule A-1:

Do not attach brokerage or financial statements.

- Disclose the name of the business entity.
- Provide a general description of the business activity of the entity (e.g., pharmaceuticals, computers, automobile manufacturing, or communications).
- Check the box indicating the highest fair market value of your investment during the reporting period. If you are filing a candidate or an assuming office statement, indicate the fair market value on the filing date or the date you took office, respectively. (See page 21 for more information.)
- Identify the nature of your investment (e.g., stocks, warrants, options, or bonds).
- An acquired or disposed of date is only required if you initially acquired or entirely disposed of the investment interest during the reporting period. The date of a stock dividend reinvestment or partial disposal is not required. Generally, these dates will not apply if you are filing a candidate or an assuming office statement.

Examples:

Frank Byrd holds a state agency position. His conflict of interest code requires full disclosure of investments. Frank must disclose his stock holdings of \$2,000 or more in any company that is located in or does business in California, as well as those stocks held by his spouse or registered domestic partner and dependent children.

Alice Lance is a city council member. She has a 4% interest, worth \$5,000, in a limited partnership located in the city. Alice must disclose the partnership on Schedule A-1 and income of \$500 or more received from the partnership on Schedule C.

Reminders

- Do you know your agency's jurisdiction?
- Did you hold investments at any time during the period covered by this statement?
- Code filers – your disclosure categories may only require disclosure of specific investments.

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

AMENDMENT

FPPC Form 700 - Schedule A-2 (2020/2021)
advice@fppc.ca.gov • 866-275-3772 • www.fppc.ca.gov

Instructions – Schedule A-2

Investments, Income, and Assets of Business Entities/Trusts

Use Schedule A-2 to report investments in a business entity (including a consulting business or other independent contracting business) or trust (including a living trust) in which you, your spouse or registered domestic partner, and your dependent children, together or separately, had a 10% or greater interest, totaling \$2,000 or more, during the reporting period and which is located in, doing business in, planning to do business in, or which has done business during the previous two years in your agency's jurisdiction. See Reference Pamphlet, page 13. A trust located outside your agency's jurisdiction is reportable if it holds assets that are located in or doing business in the jurisdiction. Do not report a trust that contains non-reportable interests. For example, a trust containing only your personal residence not used in whole or in part as a business, your savings account, and some municipal bonds, is not reportable.

Also report on Schedule A-2 investments and real property held by that entity or trust if your pro rata share of the investment or real property interest was \$2,000 or more during the reporting period.

To Complete Schedule A-2:

Part 1. Disclose the name and address of the business entity or trust. If you are reporting an interest in a business entity, check "Business Entity" and complete the box as follows:

- Provide a general description of the business activity of the entity.
- Check the box indicating the highest fair market value of your investment during the reporting period.
- If you initially acquired or entirely disposed of this interest during the reporting period, enter the date acquired or disposed.
- Identify the nature of your investment.
- Disclose the job title or business position you held with the entity, if any (i.e., if you were a director, officer, partner, trustee, employee, or held any position of management). A business position held by your spouse is not reportable.

Part 2. Check the box indicating **your pro rata** share of the **gross** income received **by** the business entity or trust. This amount includes your pro rata share of the **gross** income **from** the business entity or trust, as well as your community property interest in your spouse's or registered domestic partner's share. Gross income is the total amount of income before deducting expenses, losses, or taxes.

Part 3. Disclose the name of each source of income that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency's jurisdiction, as follows:

- Disclose each source of income and outstanding loan **to the business entity or trust** identified in Part 1 if your pro rata share of the **gross** income (including your community property interest in your spouse's or registered domestic partner's share) to the business entity or trust from that source was \$10,000 or more during the reporting

period. See Reference Pamphlet, page 11, for examples. Income from governmental sources may be reportable if not considered salary. See Regulation 18232. Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.

- Disclose each individual or entity that was a source of commission income of \$10,000 or more during the reporting period through the business entity identified in Part 1. See Reference Pamphlet, page 8, for an explanation of commission income.

You may be required to disclose sources of income located outside your jurisdiction. For example, you may have a client who resides outside your jurisdiction who does business on a regular basis with you. Such a client, if a reportable source of \$10,000 or more, must be disclosed.

Mark "None" if you do not have any reportable \$10,000 sources of income to disclose. Phrases such as "various clients" or "not disclosing sources pursuant to attorney-client privilege" are not adequate disclosure. See Reference Pamphlet, page 14, for information on procedures to request an exemption from disclosing privileged information.

Part 4. Report any investments or interests in real property held or leased **by the entity or trust** identified in Part 1 if your pro rata share of the interest held was \$2,000 or more during the reporting period. Attach additional schedules or use FPPC's Form 700 Excel spreadsheet if needed.

- Check the applicable box identifying the interest held as real property or an investment.
- If investment, provide the name and description of the business entity.
- If real property, report the precise location (e.g., an assessor's parcel number or address).
- Check the box indicating the highest fair market value of your interest in the real property or investment during the reporting period. (Report the fair market value of the portion of your residence claimed as a tax deduction if you are utilizing your residence for business purposes.)
- Identify the nature of your interest.
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property or investment during the reporting period.

SCHEDULE B
Interests in Real Property
(Including Rental Income)

► ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

CITY _____

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

_____/_____/20 _____/_____/20
ACQUIRED DISPOSED

NATURE OF INTEREST

- ☐ Ownership/Deed of Trust ☐ Easement
☐ Leasehold _____
Yrs. remaining ☐ _____
Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

- ☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

☐ None

► ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

CITY _____

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

_____/_____/20 _____/_____/20
ACQUIRED DISPOSED

NATURE OF INTEREST

- ☐ Ownership/Deed of Trust ☐ Easement
☐ Leasehold _____
Yrs. remaining ☐ _____
Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

- ☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

☐ None

* You are not required to report loans from a commercial lending institution made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE TERM (Months/Years)

_____% ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD

- ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

☐ Guarantor, if applicable

Filer's Verification

Print Name _____

Office, Agency
or Court _____

Statement Type ☐ 2020/2021 Annual ☐ Assuming ☐ Leaving
 ☐ _____ Annual ☐ Candidate
 (yr)

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed _____
(month, day, year)

Filer's Signature _____

Comments: _____

Instructions – Schedule B

Interests in Real Property

Report interests in real property located in your agency's jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more any time during the reporting period. Real property is also considered to be "within the jurisdiction" of a local government agency if the property or any part of it is located within two miles outside the boundaries of the jurisdiction or within two miles of any land owned or used by the local government agency. See Reference Pamphlet, page 13.

Interests in real property include:

- An ownership interest (including a beneficial ownership interest)
- A deed of trust, easement, or option to acquire property
- A leasehold interest (See Reference Pamphlet, page 14.)
- A mining lease
- An interest in real property held in a retirement account (See Reference Pamphlet, page 15.)
- An interest in real property held by a business entity or trust in which you, your spouse or registered domestic partner, and your dependent children together had a 10% or greater ownership interest (Report on Schedule A-2.)
- Your spouse's or registered domestic partner's interests in real property that are legally held separately by him or her

You are not required to report:

- A residence, such as a home or vacation cabin, used exclusively as a personal residence (However, a residence in which you rent out a room or for which you claim a business deduction may be reportable. If reportable, report the fair market value of the portion claimed as a tax deduction.)
- Some interests in real property held through a blind trust (See Reference Pamphlet, page 16, for exceptions.)
 - **Please note:** A non-reportable property can still be grounds for a conflict of interest and may be disqualifying.

To Complete Schedule B:

- Report the precise location (e.g., an assessor's parcel number or address) of the real property.
- Check the box indicating the fair market value of your interest in the property (regardless of what you owe on the property).
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property during the reporting period.
- Identify the nature of your interest. If it is a leasehold,

disclose the number of years remaining on the lease.

- If you received rental income, check the box indicating the gross amount you received.
- If you had a 10% or greater interest in real property and received rental income, list the name of the source(s) if your pro rata share of the gross income from any single tenant was \$10,000 or more during the reporting period. If you received a total of \$10,000 or more from two or more tenants acting in concert (in most cases, this will apply to married couples), disclose the name of each tenant. Otherwise, mark "None."
- Loans from a private lender that total \$500 or more and are secured by real property may be reportable. **Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.**

When reporting a loan:

- Provide the name and address of the lender.
- Describe the lender's business activity.
- Disclose the interest rate and term of the loan. For variable interest rate loans, disclose the conditions of the loan (e.g., Prime + 2) or the average interest rate paid during the reporting period. The term of a loan is the total number of months or years given for repayment of the loan at the time the loan was established.
- Check the box indicating the highest balance of the loan during the reporting period.
- Identify a guarantor, if applicable.

If you have more than one reportable loan on a single piece of real property, report the additional loan(s) on Schedule C.

Example:

Allison Gande is a city planning commissioner. During the reporting period, she received rental income of \$12,000, from a single tenant who rented property she owned in the city's jurisdiction. If Allison received \$6,000 each from two tenants, the tenants' names would not be required because no single tenant paid her \$10,000 or more. A married couple is considered a single tenant.

Reminders

- Income and loans already reported on Schedule B are not also required to be reported on Schedule C.
- Real property already reported on Schedule A-2, Part 4 is not also required to be reported on Schedule B.
- Code filers – do your disclosure categories require disclosure of real property?

ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS 4600 24th Street	
CITY Sacramento	
FAIR MARKET VALUE <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input checked="" type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	IF APPLICABLE, LIST DATE: ACQUIRED <u>12 XX</u> / <u>12 XX</u> / <u>12 XX</u> DISPOSED
NATURE OF INTEREST <input type="checkbox"/> Ownership/Deed of Trust <input type="checkbox"/> Easement <input type="checkbox"/> Leasehold Yrs. remaining _____ Other _____	
IF RENTAL PROPERTY, GROSS INCOME RECEIVED <input type="checkbox"/> \$0 - \$499 <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input checked="" type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000	
SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more. <input type="checkbox"/> None Henry Wells	
NAME OF LENDER* Sophia Petroloio ADDRESS (Business Address Acceptable) 2121 Blue Sky Parkway, Sacramento BUSINESS ACTIVITY, IF ANY, OF LENDER Restaurant Owner	
INTEREST RATE 8 % <input type="checkbox"/> None	TERM (Months/Years) 15 Years
HIGHEST BALANCE DURING REPORTING PERIOD <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input checked="" type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000 <input type="checkbox"/> Guarantor, if applicable	
Comments:	

SCHEDULE C
Income, Loans, & Business
Positions
(Other than Gifts and Travel Payments)

► **1. INCOME RECEIVED**

NAME OF SOURCE OF INCOME

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

YOUR BUSINESS POSITION

GROSS INCOME RECEIVED ☐ No Income - Business Position Only

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

☐ Salary ☐ Spouse's or registered domestic partner's income
(For self-employed use Schedule A-2.)

☐ Partnership (Less than 10% ownership. For 10% or greater use
Schedule A-2.)

☐ Sale of _____
(Real property, car, boat, etc.)

☐ Loan repayment

☐ Commission or ☐ Rental Income, list each source of \$10,000 or more

(Describe)

☐ Other _____
(Describe)

► **1. INCOME RECEIVED**

NAME OF SOURCE OF INCOME

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

YOUR BUSINESS POSITION

GROSS INCOME RECEIVED ☐ No Income - Business Position Only

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

☐ Salary ☐ Spouse's or registered domestic partner's income
(For self-employed use Schedule A-2.)

☐ Partnership (Less than 10% ownership. For 10% or greater use
Schedule A-2.)

☐ Sale of _____
(Real property, car, boat, etc.)

☐ Loan repayment

☐ Commission or ☐ Rental Income, list each source of \$10,000 or more

(Describe)

☐ Other _____
(Describe)

Comments: _____

► **2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD**

* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*

INTEREST RATE

TERM (Months/Years)

ADDRESS *(Business Address Acceptable)*

_____% ☐ None

SECURITY FOR LOAN

☐ None ☐ Personal residence

☐ Real Property _____

Street address

City

☐ Guarantor _____

☐ Other _____

(Describe)

HIGHEST BALANCE DURING REPORTING PERIOD

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

Filer's Verification

Print Name _____ Office, Agency or Court _____

Statement Type ☐ 2020/2021 Annual ☐ _____ Annual ☐ Assuming ☐ Leaving ☐ Candidate
(yr)

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed _____ Filer's Signature _____
(month, day, year)

Instructions – Schedule C

Income, Loans, & Business Positions

(Income Other Than Gifts and Travel Payments)

Reporting Income:

Report the source and amount of gross income of \$500 or more you received during the reporting period. Gross income is the total amount of income before deducting expenses, losses, or taxes and includes loans other than loans from a commercial lending institution. See Reference Pamphlet, page 11. You must also report the source of income to your spouse or registered domestic partner if your community property share was \$500 or more during the reporting period.

The source and income must be reported only if the source is located in, doing business in, planning to do business in, or has done business during the previous two years in your agency's jurisdiction. See Reference Pamphlet, page 13, for more information about doing business in the jurisdiction. Reportable sources of income may be further limited by your disclosure category located in your agency's conflict of interest code.

Reporting Business Positions:

You must report your job title with each reportable business entity even if you received no income during the reporting period. Use the comments section to indicate that no income was received.

Commonly reportable income and loans include:

- Salary/wages, per diem, and reimbursement for expenses including travel payments provided by your employer
- Community property interest (50%) in your spouse's or registered domestic partner's income - **report the employer's name and all other required information**
- Income from investment interests, such as partnerships, reported on Schedule A-1
- Commission income not required to be reported on Schedule A-2 (See Reference Pamphlet, page 8.)
- Gross income from any sale, including the sale of a house or car (Report your pro rata share of the total sale price.)
- Rental income not required to be reported on Schedule B
- Prizes or awards not disclosed as gifts
- Payments received on loans you made to others
- An honorarium received prior to becoming a public official (See Reference Pamphlet, page 10, concerning your ability to receive future honoraria.)
- Incentive compensation (See Reference Pamphlet, page 12.)

Reminders

- Code filers – your disclosure categories may not require disclosure of all sources of income.
- If you or your spouse or registered domestic partner are self-employed, report the business entity on Schedule A-2.
- Do not disclose on Schedule C income, loans, or business positions already reported on Schedules A-2 or B.

You are not required to report:

- Salary, reimbursement for expenses or per diem, or social security, disability, or other similar benefit payments received by you or your spouse or registered domestic partner from a federal, state, or local government agency.
- Stock dividends and income from the sale of stock unless the source can be identified.
- Income from a PERS retirement account.

See Reference Pamphlet, page 11, for more exceptions to income reporting.

To Complete Schedule C:

Part 1. Income Received/Business Position Disclosure

- Disclose the name and address of each source of income or each business entity with which you held a business position.
- Provide a general description of the business activity if the source is a business entity.
- Check the box indicating the amount of gross income received.
- Identify the consideration for which the income was received.
- For income from commission sales, check the box indicating the gross income received and list the name of each source of commission income of \$10,000 or more. See Reference Pamphlet, page 8. **Note: If you receive commission income on a regular basis or have an ownership interest of 10% or more, you must disclose the business entity and the income on Schedule A-2.**
- Disclose the job title or business position, if any, that you held with the business entity, even if you did not receive income during the reporting period.

Part 2. Loans Received or Outstanding During the Reporting Period

- Provide the name and address of the lender.
- Provide a general description of the business activity if the lender is a business entity.
- Check the box indicating the highest balance of the loan during the reporting period.
- Disclose the interest rate and the term of the loan.
 - For variable interest rate loans, disclose the conditions of the loan (e.g., Prime + 2) or the average interest rate paid during the reporting period.
 - The term of the loan is the total number of months or years given for repayment of the loan at the time the loan was entered into.
- Identify the security, if any, for the loan.

SCHEDULE D

Income – Gifts

► NAME OF SOURCE (Not an Acronym)

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____

► NAME OF SOURCE (Not an Acronym)

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____

► NAME OF SOURCE (Not an Acronym)

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____

► NAME OF SOURCE (Not an Acronym)

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____

► NAME OF SOURCE (Not an Acronym)

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____

Filer's Verification

Print Name _____

Office, Agency
or Court _____

Statement Type ☐ 2020/2021 Annual ☐ Assuming ☐ Leaving
☐ _____ Annual ☐ Candidate
(yr)

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed _____
(month, day, year)

Filer's Signature _____

Comments: _____

Instructions – Schedule D

Income – Gifts

A gift is anything of value for which you have not provided equal or greater consideration to the donor. A gift is reportable if its fair market value is \$50 or more. In addition, multiple gifts totaling \$50 or more received during the reporting period from a single source must be reported.

It is the acceptance of a gift, not the ultimate use to which it is put, that imposes your reporting obligation. Except as noted below, you must report a gift even if you never used it or if you gave it away to another person.

If the exact amount of a gift is unknown, you must make a good faith estimate of the item's fair market value. Listing the value of a gift as "over \$50" or "value unknown" is not adequate disclosure. In addition, if you received a gift through an intermediary, you must disclose the name, address, and business activity of both the donor and the intermediary. You may indicate an intermediary either in the "source" field after the name or in the "comments" section at the bottom of Schedule D.

Commonly reportable gifts include:

- Tickets/passes to sporting or entertainment events
- Tickets/passes to amusement parks
- Parking passes not used for official agency business
- Food, beverages, and accommodations, including those provided in direct connection with your attendance at a convention, conference, meeting, social event, meal, or like gathering
- Rebates/discounts not made in the regular course of business to members of the public without regard to official status
- Wedding gifts (See Reference Pamphlet, page 16)
- An honorarium received prior to assuming office (You may report an honorarium as income on Schedule C, rather than as a gift on Schedule D, if you provided services of equal or greater value than the payment received. See Reference Pamphlet, page 10, regarding your ability to receive future honoraria.)
- Transportation and lodging (See Schedule E.)
- Forgiveness of a loan received by you

Reminders

- Gifts from a single source are subject to a \$500 limit in 2020. See Reference Pamphlet, page 10.
- Code filers – you only need to report gifts from reportable sources.

Gift Tracking Mobile Application

- FPPC has created a gift tracking app for mobile devices that helps filers track gifts and provides a quick and easy way to upload the information to the Form 700. Visit FPPC's website to download the app.

You are not required to disclose:

- Gifts that were not used and that, within 30 days after receipt, were returned to the donor or delivered to a charitable organization or government agency without being claimed by you as a charitable contribution for tax purposes
- Gifts from your spouse or registered domestic partner, child, parent, grandparent, grandchild, brother, sister, and certain other family members (See Regulation 18942 for a complete list.). The exception does not apply if the donor was acting as an agent or intermediary for a reportable source who was the true donor.
- Gifts of similar value exchanged between you and an individual, other than a lobbyist registered to lobby your state agency, on holidays, birthdays, or similar occasions
- Gifts of informational material provided to assist you in the performance of your official duties (e.g., books, pamphlets, reports, calendars, periodicals, or educational seminars)
- A monetary bequest or inheritance (However, inherited investments or real property may be reportable on other schedules.)
- Personalized plaques or trophies with an individual value of less than \$250
- Campaign contributions
- Up to two tickets, for your own use, to attend a fundraiser for a campaign committee or candidate, or to a fundraiser for an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code. The ticket must be received from the organization or committee holding the fundraiser.
- Gifts given to members of your immediate family if the source has an established relationship with the family member and there is no evidence to suggest the donor had a purpose to influence you. (See Regulation 18943.)
- Free admission, food, and nominal items (such as a pen, pencil, mouse pad, note pad or similar item) available to all attendees, at the event at which the official makes a speech (as defined in Regulation 18950(b)(2)), so long as the admission is provided by the person who organizes the event.
- Any other payment not identified above, that would otherwise meet the definition of gift, where the payment is made by an individual who is not a lobbyist registered to lobby the official's state agency, where it is clear that the gift was made because of an existing personal or business relationship unrelated to the official's position and there is no evidence whatsoever at the time the gift is made to suggest the donor had a purpose to influence you.

To Complete Schedule D:

- Disclose the full name (not an acronym), address, and, if a business entity, the business activity of the source.
- Provide the date (month, day, and year) of receipt, and disclose the fair market value and description of the gift.

SCHEDULE E
Income – Gifts
Travel Payments, Advances,
and Reimbursements

- Mark either the gift or income box.
- Mark the "501(c)(3)" box for a travel payment received from a nonprofit 501(c)(3) organization or the "Speech" box if you made a speech or participated in a panel. Per Government Code Section 89506, these payments may not be subject to the gift limit. However, they may result in a disqualifying conflict of interest.
- For gifts of travel, provide the travel destination.

▶ NAME OF SOURCE (Not an Acronym) _____

ADDRESS (Business Address Acceptable) _____

CITY AND STATE _____

☐ 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE _____

DATE(S): ____/____/____ - ____/____/____ AMT: \$ _____
(If gift)

▶ MUST CHECK ONE: ☐ Gift **-or-** ☐ Income

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE (Not an Acronym) _____

ADDRESS (Business Address Acceptable) _____

CITY AND STATE _____

☐ 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE _____

DATE(S): ____/____/____ - ____/____/____ AMT: \$ _____
(If gift)

▶ MUST CHECK ONE: ☐ Gift **-or-** ☐ Income

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE (Not an Acronym) _____

ADDRESS (Business Address Acceptable) _____

CITY AND STATE _____

☐ 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE _____

DATE(S): ____/____/____ - ____/____/____ AMT: \$ _____
(If gift)

▶ MUST CHECK ONE: ☐ Gift **-or-** ☐ Income

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

Filer's Verification

Print Name _____

Office, Agency
or Court _____

Statement Type ☐ 2020/2021 Annual ☐ Assuming ☐ Leaving
☐ _____ Annual ☐ Candidate
(yr)

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed _____
(month, day, year)

Filer's Signature _____

Comments: _____

Instructions – Schedule E Travel Payments, Advances, and Reimbursements

Travel payments reportable on Schedule E include advances and reimbursements for travel and related expenses, including lodging and meals.

Gifts of travel may be subject to the gift limit. In addition, certain travel payments are reportable gifts, but are not subject to the gift limit. To avoid possible misinterpretation or the perception that you have received a gift in excess of the gift limit, you may wish to provide a specific description of the purpose of your travel. See the FPPC fact sheet entitled "Limitations and Restrictions on Gifts, Honoraria, Travel, and Loans" to read about travel payments under section 89506(a).

You are not required to disclose:

- Travel payments received from any state, local, or federal government agency for which you provided services equal or greater in value than the payments received, such as reimbursement for travel on agency business from your government agency employer.
- A payment for travel from another local, state, or federal government agency and related per diem expenses when the travel is for education, training or other inter-agency programs or purposes.
- Travel payments received from your employer in the normal course of your employment that are included in the income reported on Schedule C.
- A travel payment that was received from a non-profit entity exempt from taxation under Internal Revenue Code Section 501(c)(3) for which you provided equal or greater consideration, such as reimbursement for travel on business for a 501(c)(3) organization for which you are a board member.

Note: Certain travel payments may not be reportable if reported via email on Form 801 by your agency.

To Complete Schedule E:

- Disclose the full name (not an acronym) and address of the source of the travel payment.
- Identify the business activity if the source is a business entity.
- Check the box to identify the payment as a gift or income, report the amount, and disclose the date(s).
 - **Travel payments are gifts** if you did not provide services that were equal to or greater in value than the payments received. You must disclose gifts totaling \$50 or more from a single source during the period covered by the statement.

When reporting travel payments that are gifts, you must provide a description of the gift and the **date(s)** received. If the travel occurred on or after January 1, 2017, you must also disclose the **travel destination**

- **Travel payments are income** if you provided services that were equal to or greater in value than the payments received. You must disclose income totaling \$500 or more from a single source during the period

covered by the statement. You have the burden of proving the payments are income rather than gifts. When reporting travel payments as income, you must describe the services you provided in exchange for the payment. You are not required to disclose the date(s) for travel payments that are income.

Example:

City council member MaryClaire Chandler is the chair of a 501 (c)(6) trade association, and the association pays for her travel to attend its meetings. Because MaryClaire is deemed to be providing equal or greater consideration for the travel payment by virtue of serving on the board, this payment may be reported as income. Payments for MaryClaire to attend other events for which she is not providing services are likely considered gifts. Note that the same payment from a 501(c)(3) would NOT be reportable.

▶ NAME OF SOURCE (Not an Acronym)	
Health Services Trade Association	
ADDRESS (Business Address Acceptable)	
1230 K Street, Suite 610	
CITY AND STATE	
Sacramento, CA	
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE	
Association of Healthcare Workers	
DATE(S):	AMT: \$ 150.00
(If gift)	
▶ MUST CHECK ONE: <input type="checkbox"/> Gift -or- <input checked="" type="checkbox"/> Income	
<input type="radio"/> Made a Speech/Participated in a Panel	
<input checked="" type="radio"/> Other - Provide Description Travel reimbursement for board meeting.	

Example:

Mayor Kim travels to China on a trip organized by China Silicon Valley Business Development, a California nonprofit, 501(c)(6) organization. The Chengdu Municipal People's Government pays for Mayor Kim's airfare and travel costs, as well as his meals and lodging during the trip. The trip's agenda shows that the trip's purpose is to promote job creation and economic activity in China and in Silicon Valley, so the trip is reasonably related to a governmental purpose. Thus, Mayor Kim must report the gift of travel, but the gift is exempt from the gift limit. In this case, the travel payments are not subject to the gift limit because the source is a foreign government and because the travel is reasonably related to a governmental purpose. (Section 89506(a)(2).) Note that Mayor Kim could be disqualified from participating in or making decisions about The Chengdu Municipal People's Government for 12 months. Also note that if China Silicon Valley Business Development (a 501(c)(6) organization) paid for the travel costs rather than the governmental organization, the payments would be subject to the gift limits. (See the FPPC fact sheet, Limitations and Restrictions on Gifts, Honoraria, Travel and Loans, at www.fppc.ca.gov.)

▶ NAME OF SOURCE (Not an Acronym)	
Chengdu Municipal People's Government	
ADDRESS (Business Address Acceptable)	
2 Caoshi St, CaoShiJie, Qingyang Qu, Chengdu Shi,	
CITY AND STATE	
Sichuan Sheng, China, 610000	
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE	
DATE(S): 09 / 04 / XX - 09 / 08 / XX AMT: \$ 3,874.38	
(If gift)	
▶ MUST CHECK ONE: <input checked="" type="checkbox"/> Gift -or- <input type="checkbox"/> Income	
<input type="radio"/> Made a Speech/Participated in a Panel	
<input checked="" type="radio"/> Other - Provide Description Travel reimbursement for trip to China.	
▶ If Gift, Provide Travel Destination	
Sichuan Sheng, China	