

Ducor School
23761 Avenue 56 – P.O. Box 249
Ducor, CA 93218
(559) 534-2261

Board of Trustees:

Mary McGill, (President)
Diana Vance (Clerk)
Florance Pace (Member)

Gabina Becerra (Member)
Maria Vasquez (Member)

School Board Meeting/DLAC Meeting

February 8, 2022
Meeting Place: Library Room # 23 **resolution(s): 5**
Open Session 05:30 PM
***Possible board action**

Board Agenda

1. Called to order: Time: _____ pm

_____ Board President Mary McGill _____ Board Member Florance Pace _____ Board Member Gabina Becerra
_____ Board Clerk Diana Vance _____ Board Member Maria Vasquez

1.1 Pledge of Allegiance

1.2 Introduction of Visitors:

1.3 Community Input:

2. Regular Business Agenda/Board Action:

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

Public hearing was open at: _____

Discussion:

Public hearing was closed at: _____

2.3 * Review School Board Minutes for January 11, 2022

Adoption:

Action: Mrs. McGill _____ Mrs. Pace _____ Ms. Becerra _____ Mrs. Vance _____ Mrs. Vasquez _____

2.4 * Accounts Payable January 2022

Adoption:

Action: Mrs. McGill _____ Mrs. Pace _____ Ms. Becerra _____ Mrs. Vance _____ Mrs. Vasquez _____

2.5* EKC Enterprise, Inc: Promethean Boards. Title funding and or general funds. \$50, 713

Adoption:

Action: Mrs. McGill _____ Mrs. Pace _____ Ms. Becerra _____ Mrs. Vance _____ Mrs. Vasquez _____

3. **Informational:**

- 3.1 Attendance
- 3.2 Reading DATA
- 3.3 ESports Program
- 3.4 Staff Positions
- 3.5 Form 700
- 3.6 Kinder Project
- 3.7 School Bond
- 3.8 Superintendent Evaluation
- 3.9 March 15 CTA/CSEA

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. McGill _____ Mrs. Pace _____ Ms. Becerra _____ Mrs. Vance _____ Mrs. Vasquez _____

6. **Closed Session: Business**

- 6.1. Employee Business (Gov. Code 54957)
- 6.2. Superintendent Business

7. **Report Out of Closed Session:** Time: _____ pm

Action: Mrs. McGill _____ Mrs. Pace _____ Ms. Becerra _____ Mrs. Vance _____ Mrs. Vasquez _____

Agenda #__:

Action: Mrs. McGill _____ Mrs. Pace _____ Ms. Becerra _____ Mrs. Vance _____ Mrs. Vasquez _____

Agenda #__:

Action: Mrs. McGill _____ Mrs. Pace _____ Ms. Becerra _____ Mrs. Vance _____ Mrs. Vasquez _____

8. **Adjournment:** _____ **Time:** _____ pm

Action: Mrs. McGill _____ Mrs. Pace _____ Ms. Becerra _____ Mrs. Vance _____ Mrs. Vasquez _____

2.3

Ducor School

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Florance Pace (Member)

Gabina Becerra (Member)
Maria Vasquez (Member)

School Board Meeting/DLAC Meeting

Jan 11, 2022

Meeting Place: Library Room # 23

resolution(s): 5

Open Session 05:30 PM

*Possible board action

Board Agenda Minutes

1. Called to order: Time: 5:25 pm

 x Board President Mary McGill x Board Member Florance Pace x Board Member Gabina Becerra

 x Board Clerk Diana Vance x Board Member Maria Vasquez

1.1 Pledge of Allegiance

1.2 Introduction of Visitors: Laura Fielder, Hector Jimenez, Maria Jimenez, Maryann Woodruff , Shawn Fielder, jeremiah sosa, Steve McCurry , Louis Smith

1.3 Community Input: Mrs. Fielder asked about the cafeteria food, any future changes, FSU field trip, parent graduation meeting and the ducor hats. Mrs. Fielder also asked about her children getting tutoring. Mr. Smith talked about how the students' behavior improved from break. Mr. McCurry talked about the winter session, parent feedback. Mrs. Woodruff talked about the winter session. Maria Jimenez had questions but would wait.

2. Regular Business Agenda/Board Action:

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

Public hearing was open at: _____

Discussion:

Public hearing was closed at: _____

2.3 * Review School Board Minutes for December 14, 2021

Adoption: Approved

Action: Mrs. McGill__M__Mrs. Pace__2__Ms. Becerra__abstain__Mrs. Vance__1__Mrs. Vasquez__abstain____
Mrs. Pace asked about the cameras. Mrs. Vance asked about the southwest funds and STS computers

2.4 * Accounts Payable December 2021

Adoption: Approved

Action: Mrs. McGill__M__Mrs. Pace__aye____Ms. Becerra__1__Mrs. Vance__aye____Mrs. Vasquez__2____

2.5 * California Code, Education Code - EDC § 60510: The state board, the governing board of a school district, or a county office of education may dispose of surplus or undistributed obsolete instructional materials:

41 Wonders Content Readers, 6 CA. Treasures Teacher Guides, 8 CA. Treasures Teacher Resource Guides

Adoption: Approved

Action: Mrs. McGill__M__Mrs. Pace__1____Ms. Becerra__aye____Mrs. Vance__2__Mrs. Vasquez__aye____

2.6 * Consultant Agreement, Tyger Bates, CPA: specially trained, experienced and competent in the field of school business, state and federal programs and required LCAP planning. Consultant shall be paid at the rate of \$1000 month.

Adoption: Approved

Action: Mrs. McGill__M__Mrs. Pace__1____Ms. Becerra__2____Mrs. Vance__aye____Mrs. Vasquez__aye____

2.7* Nelson Adams NACO Inc; replace existing cafeteria tables and benches with new Tables and Benches.
Cost of \$33,839.23.

Adoption: Approved

Action: Mrs. McGill__M__Mrs. Pace__aye____Ms. Becerra__aye____Mrs. Vance__1__Mrs. Vasquez__2____

2.8* Interdistrict Agreement: Approved in November.

One student from TB to Ducor

Adoption:

Action: Mrs. McGill____Mrs. Pace____Ms. Becerra____Mrs. Vance____Mrs. Vasquez____

3. Informational:

- 3.1 Attendance
- 3.2 Form 700
- 3.3 Kinder Project
- 3.4 School Bond

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. McGill __M__ Mrs. Pace __1__ Ms. Becerra __2__ Mrs. Vance __aye__ Mrs. Vasquez __aye__

6. Closed Session: Business

6.1. Employee Business (Gov. Code 54957)

6.2. Superintendent Business

7. Report Out of Closed Session: Time: __6:55__ pm

Action: Mrs. McGill __M__ Mrs. Pace __aye__ Ms. Becerra __1__ Mrs. Vance __aye__ Mrs. Vasquez __2__

Agenda #__:

Action: Mrs. McGill _____ Mrs. Pace _____ Ms. Becerra _____ Mrs. Vance _____ Mrs. Vasquez _____

Agenda #__:

Action: Mrs. McGill _____ Mrs. Pace _____ Ms. Becerra _____ Mrs. Vance _____ Mrs. Vasquez _____

8. Adjournment: Time: __6:55__ pm

Action: Mrs. McGill __M__ Mrs. Pace __aye__ Ms. Becerra __1__ Mrs. Vance __aye__ Mrs. Vasquez __2__

Tulare County Office of Education

Page 1 of 4
APY500

1/27/2022
4:22:10PM

Batch No 383

| Vendor No | Vendor Name | Reference Number | Invoice Date | PO # | Invoice No | Separate Check | Account Code | Amount | Audit Flag | EFT |
|-----------|--------------------------------|------------------|--------------|------|----------------------|----------------|--------------------------------------------------------------------------------------------|------------|------------|-----|
| 013417 | Culligan (Water Conditioning) | PV-220605 | 12/31/2021 | | 38924 | | 010-00000-0-00000-82000-55000-0-0000 bottled water delivery service | \$289.50 | | |
| | | | | | | | Total Check Amount: | \$289.50 | | |
| 011811 | DUCOR COMMUNITY SERVICES DISTR | PV-220602 | 1/1/2022 | | 11/29/2021-12/29/202 | | 010-00000-0-00000-82000-55000-0-0000 water | \$288.16 | | |
| | | | | | | | Total Check Amount: | \$288.16 | | |
| 013504 | Figueroa Consulting Co. | PV-220620 | 12/31/2021 | | 1024 | | 010-31820-2-11100-10000-58000-0-0000 support for organizing for improvement, data suppo | \$6,825.00 | | L |
| | | | | | | | Total Check Amount: | \$6,825.00 | | |
| 013623 | Howard Technology Solutions | PV-220606 | 1/4/2022 | | 22-00539274 | | 010-32130-0-00000-85000-64000-0-0000 cloud bundle-filter at \$9.97e for 150qty | \$1,495.50 | | |
| | | | | | | | Total Check Amount: | \$1,495.50 | | |
| 012938 | HWY 65 DIESEL SERVICE | PV-220618 | 1/11/2022 | | 011196 | | 010-07230-0-00000-36000-56000-0-0000 repairs to bus 5 | \$575.60 | | |
| | | | | | | | Total Check Amount: | \$575.60 | | |
| 013541 | Juan Martinez | PV-220613 | 1/14/2022 | | 1142022 | | 010-00000-0-11100-42000-58000-0-0000 referee for 2 girls basketball games(\$40e) | \$80.00 | | |
| | Juan Martinez | PV-220614 | 1/21/2022 | | 1212022 | | 010-00000-0-11100-42000-58000-0-0000 referee 2 girls basketball games(\$40e) | \$80.00 | | |
| | | | | | | | Total Check Amount: | \$160.00 | | |
| 013451 | Juan T. Reyes Consulting | PV-220621 | 1/1/2022 | | 0006 | | 010-31820-2-11100-10000-58000-0-0000 supervisor of mentor leadership program and life s | \$8,990.00 | | L |
| | | | | | | | Total Check Amount: | \$8,990.00 | | |
| 013542 | MARK CHAMBERS | PV-220615 | 1/21/2022 | | 1212022-2 | | 010-00000-0-11100-42000-58000-0-0000 referee 2 boys basketball games(\$40e) | \$80.00 | | |
| | MARK CHAMBERS | PV-220616 | 1/14/2022 | | 1142022-1 | | 010-00000-0-11100-42000-58000-0-0000 Total Check Amount: | \$80.00 | | |
| | | | | | | | Total Check Amount: | \$160.00 | | |

Page 2 of 4
APY500

APY500

Batch No 383

| Vendor No | Vendor Name | Reference Number | Invoice Date | PO # | Invoice No | Separate Check | Account Code | Amount | Audit Flag | EFT |
|-----------|-------------------------------|------------------|--------------|------|------------|----------------|-------------------------------------------------------------------------------------------------------------------|-----------------------|------------|-----|
| 012443 | QUILL CORPORATION | PV-220619 | 1/10/2022 | | 22203348 | | 010-00000-0-00000-27000-43000-0-0000 laminating film, 3 at \$85.99e w/tax | \$277.96 | | |
| 013199 | RES COM Pest Control | PV-220607 | 1/8/2022 | | 1989737 | | Total Check Amount: 130-53100-0-00000-82000-55000-0-0000 spray for ants, roaches, spiders | \$277.96 \$45.00 | | |
| 013604 | RMA Geoscience | PV-220603 | 12/27/2021 | | 13241 | | Total Check Amount: 350-77150-0-00000-85000-62000-0-0000 Kindergarten Class addition. Grading obsrv, testin | \$45.00 \$3,606.50 | | |
| 013624 | Sarah West | PV-220622 | 12/4/2021 | | 5487 | | Total Check Amount: 010-32120-0-11100-10000-43000-0-0000 reimbursement for purchase of items for STEAM proj | \$3,606.50 \$19.92 | | |
| | Sarah West | PV-220623 | 12/4/2021 | | 5382 | | 010-32120-0-11100-10000-43000-0-0000 reimbursement for items purchased for STEAM projec | \$39.92 | | |
| | Sarah West | PV-220624 | 12/4/2021 | | 5427 | | 010-32120-0-11100-10000-43000-0-0000 | \$23.40 | | |
| | Sarah West | PV-220625 | 12/17/2021 | | 4580 | | 010-32120-0-11100-10000-43000-0-0000 reimbursement for purchase of items for STEAM proj | \$24.73 | | |
| | Sarah West | PV-220626 | 11/30/2021 | | 9312 | | 010-32120-0-11100-10000-43000-0-0000 | \$10.96 | | |
| | Sarah West | PV-220627 | 12/12/2021 | | 9332 | | 010-32120-0-11100-10000-43000-0-0000 | \$6.60 | | |
| | Sarah West | PV-220628 | 12/12/2021 | | 8432 | | 010-32120-0-11100-10000-43000-0-0000 | \$6.60 | | |
| | Sarah West | PV-220629 | 12/12/2021 | | 7297 | | 010-32120-0-11100-10000-43000-0-0000 | \$23.17 | | |
| | Sarah West | PV-220630 | 12/6/2021 | | 6525 | | 010-32120-0-11100-10000-43000-0-0000 | \$10.26 | | |
| 012106 | TERRA BELLA IRRIGATION SUPPLY | PV-220604 | 1/3/2022 | | 5159 | | Total Check Amount: 010-00000-0-00000-82000-55000-0-0000 supplies for irrigation system | \$165.56 \$17.12 | | |
| 012837 | THE HOME DEPOT PRO-Supplyw | PV-220608 | 12/30/2021 | | 660785361 | | Total Check Amount: 010-00000-0-00000-82000-55000-0-0000 laboratory fct singl | \$17.12 \$143.27 | | |
| | THE HOME DEPOT PRO-Supplyw | PV-220609 | 1/7/2022 | | 661835355 | | 010-00000-0-00000-82000-55000-0-0000 can liners, toilet ppr, ppr towels, skin cleanser | \$533.51 | | |

Accounts Payable Final Prelist - 1/27/2022 4:22:10PM

*** FINAL ***

Batch No 383

Audit

Amount Flag EFT

| Vendor No | Vendor Name | Reference Number | Invoice Date | PO # | Invoice No | Separate Check | Account Code | Amount |
|-----------|---------------------------------|------------------|--------------|------|------------|----------------------------------------------------|--------------------------------------|----------|
| 012837 | THE HOME DEPOT PRO-Supplywo rks | PV-220610 | 1/7/2022 | | 661977884 | | 010-00000-0-00000-82000-55000-0-0000 | \$42.33 |
| | | | | | | 2 plastic dustpans | | |
| | | | | | | 010-00000-0-00000-82000-55000-0-0000 | | \$103.01 |
| | | | | | | 2 mats | | |
| | | | | | | Total Check Amount: | | \$822.12 |
| 012972 | Tulare County Env. Health | PV-220601 | 1/5/2022 | | 1975599 | | 010-00000-0-00000-82000-58000-0-0000 | \$285.00 |
| | | | | | | HAZ MAT | | |
| | | | | | | Total Check Amount: | | \$285.00 |
| 012709 | TULARE COUNTY OFFICE OF ED. | PV-220617 | 1/5/2022 | | 220919 | | 010-00000-0-00000-27000-58000-0-0000 | \$10.00 |
| | | | | | | TB skin testing & assessment clinic for 1 employee | | |
| | | | | | | Total Check Amount: | | \$10.00 |
| 013486 | U.S. Bank Corporate Payment Sy | PV-220631 | 11/1/2021 | | ref# 4765 | | 010-11000-0-00000-81100-43000-0-0000 | \$71.00 |
| | | | | | | supplies for campus maintenance | | |
| | | | | | | 010-63000-0-11100-10000-43000-0-0000 | | \$117.99 |
| | | | | | | pizza purchase for Perfect Attendance | | |
| | | | | | | 010-30100-2-11100-10000-58000-0-0000 | | \$4.99 |
| | | | | | | subscription to Amazon kids | | |
| | | | | | | 010-11000-0-00000-81100-43000-0-0000 | | \$21.35 |
| | | | | | | chalk for the soccer field | | |
| | | | | | | 010-11000-0-00000-81100-43000-0-0000 | | \$21.35 |
| | | | | | | chalk for soccer field | | |
| | | | | | | 010-30100-2-11100-10000-58000-0-0000 | | \$9.99 |
| | | | | | | Kindle unlimited subscription | | |
| | | | | | | 010-07230-0-00000-36000-43000-0-0000 | | \$125.00 |
| | | | | | | diesel purchase for Bus transportation | | |
| | | | | | | 010-07230-0-00000-36000-43000-0-0000 | | \$298.96 |
| | | | | | | diesel for pupil transportation | | |
| | | | | | | 010-11000-0-00000-81100-43000-0-0000 | | \$109.99 |
| | | | | | | product from Blend Magic | | |
| | | | | | | 010-07230-0-00000-36000-43000-0-0000 | | \$206.83 |
| | | | | | | diesel purchase for pupil transportation | | |
| | | | | | | 010-07230-0-00000-36000-43000-0-0000 | | \$21.21 |
| | | | | | | item purchase at Ducor Mart | | |

| Vendor No | | Vendor Name | Reference Number | Invoice Date | PO # | Invoice No | Separate Check | Account Code | Amount | Flag | EFT |
|-----------|--|--------------------------------|------------------|--------------|------|----------------|---------------------------------------------------|--------------------------------------|------------|------|-----|
| 013486 | | U.S. Bank Corporate Payment Sy | PV-220642 | 11/8/2021 | | ref# 0208 | | 010-07230-0-00000-36000-43000-0-0000 | \$232.99 | M | |
| | | U.S. Bank Corporate Payment Sy | PV-220643 | 11/8/2021 | | ref# 0448 | diesel purchase for pupil transportation | 010-07230-0-00000-36000-43000-0-0000 | \$256.96 | M | |
| | | U.S. Bank Corporate Payment Sy | PV-220644 | 11/19/2021 | | ref# 2227 | | 010-07230-0-00000-36000-43000-0-0000 | \$302.42 | M | |
| | | U.S. Bank Corporate Payment Sy | PV-220645 | 11/19/2021 | | ref# 5055 | | 010-30100-2-11100-10000-42000-0-0000 | \$23.00 | M | |
| | | U.S. Bank Corporate Payment Sy | PV-220646 | 11/19/2021 | | ref# 0927 | books for students | 010-30100-2-11100-10000-42000-0-0000 | \$192.86 | M | |
| | | U.S. Bank Corporate Payment Sy | PV-220647 | 11/19/2021 | | ref# 2235 | | 010-30100-2-11100-10000-42000-0-0000 | \$348.82 | M | |
| | | U.S. Bank Corporate Payment Sy | PV-220648 | 11/19/2021 | | ref# 4913 | | 010-30100-2-11100-10000-43000-0-0000 | \$483.18 | M | |
| | | U.S. Bank Corporate Payment Sy | PV-220649 | 11/19/2021 | | ref# 8181 | | 010-30100-2-11100-10000-42000-0-0000 | \$22.65 | M | |
| | | U.S. Bank Corporate Payment Sy | PV-220650 | 11/18/2021 | | ref# 4371 | book for students | 010-07230-0-00000-36000-43000-0-0000 | \$101.65 | M | |
| | | U.S. Bank Corporate Payment Sy | PV-220651 | 11/12/2021 | | ref# 9245 | unleaded fuel for purchase for Van used for pupil | 010-32120-0-11100-10000-43000-0-0000 | \$54.48 | M | |
| | | U.S. Bank Corporate Payment Sy | PV-220652 | 11/1/2021 | | ref# 6005 | replacement battery for chromebook | 010-32120-0-11100-10000-43000-0-0000 | \$118.50 | M | |
| | | U.S. Bank Corporate Payment Sy | PV-220653 | 11/3/2021 | | ref# 7006 | streaming camera w/bluetooth function | 010-00000-0-00000-27000-43000-0-0000 | \$63.09 | M | |
| | | U.S. Bank Corporate Payment Sy | PV-220654 | 11/8/2021 | | ref# 1553 | extension cord for office | 010-32120-0-11100-10000-58000-0-0000 | \$5.99 | M | |
| | | U.S. Bank Corporate Payment Sy | PV-220655 | 11/3/2021 | | ref# 3129 | tech support & hardware coverage monthly charge | 010-00000-0-00000-27000-43000-0-0000 | \$18.64 | M | |
| | | U.S. Bank Corporate Payment Sy | PV-220656 | 9/27/2021 | | ref# 0552 | zip ties for office | 010-30100-2-11100-10000-42000-0-0000 | \$43.05 | M | |
| | | U.S. Bank Corporate Payment Sy | PV-220657 | 10/14/2021 | | ref# 63077 | book for students | 010-32120-0-11100-10000-58000-0-0000 | \$179.88 | M | |
| | | U.S. Bank Corporate Payment Sy | PV-220658 | 10/22/2021 | | ref# 46011 | Adobe acrobat for Mac | 010-00000-0-00000-27000-43000-0-0000 | \$646.44 | M | |
| | | U.S. Bank Corporate Payment Sy | PV-220659 | 10/23/2021 | | ref# 12479 | stacking chairs and service carts for office | 010-00000-0-00000-27000-43000-0-0000 | \$269.36 | M | |
| | | | | | | | Total Check Amount: | | \$4,372.62 | | |
| 012434 | | WASTE MANAGEMENT | PV-220612 | 1/1/2022 | | 4577289-0165-5 | trash service for Dec. 2021 | 010-00000-0-00000-82000-55000-0-0000 | \$737.02 | | |
| | | | | | | | Total Check Amount: | | \$737.02 | | |
| | | | | | | | | | \$737.02 | | |

*** FINAL ***
 Batch No 383
 Audit

Page 1 of 1
APY500

Accounts Payable Final Prelist - 1/27/2022 4:22:10PM

FINAL

Batch No 383

Audit

| Vendor No | Vendor Name | Reference Number | Invoice Date | PO # | Invoice No | Separate Check | Account Code | Amount | Flag | EFT |
|--------------------------------|-------------|------------------|--------------|------|------------|----------------|--------------|--------|------|-------------|
| Total District Payment Amount: | | | | | | | | | | \$29,122.66 |

Accounts Payable Final Prelist - 1/27/2022 4:22:10PM

*** FINAL ***

Batch No 383

Audit

Amount Flag EFT

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

Batch No 383

Total Accounts Payable: \$29,122.66

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 29,122.66 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 | \$25,471.16 |
| 130 | \$45.00 |
| 350 | \$3,606.50 |
| Total | \$29,122.66 |

Accounts Payable Final Prelist - 1/13/2022 3:43:30PM

*** FINAL ***

Batch No 381

Audit

Amount Flag EFT

| Vendor No | Vendor Name | Reference Number | Invoice Date | PO # | Invoice No | Separate Check | Account Code | |
|-----------|------------------------------|------------------|--------------|------|--------------|----------------|--------------------------------------|----------------------------------------------------|
| 013567 | ADT Commercial LLC | PV-220580 | 7/2/2021 | | 140763851 | | 010-00000-0-00000-27000-58000-0-0000 | alarm troubleshoot |
| | | | | | | | | \$218.50 |
| | | | | | | | | Total Check Amount: |
| 013539 | AIR TECHS | PV-220599 | 12/22/2022 | | 12721 | | 010-07200-0-00000-81100-56000-0-0000 | fabricate and install a new hvac sheet metal platf |
| | | | | | | | | \$1,568.96 |
| | | | | | | | | Total Check Amount: |
| 011655 | A-L WELDING | PV-220561 | 12/8/2021 | | A60187 | | 010-11000-0-00000-81100-43000-0-0000 | maintenance supplies |
| | | | | | | | | \$86.22 |
| | | | | | | | | Total Check Amount: |
| 013620 | ARAMARK | PV-220568 | 1/7/2022 | | 258000082908 | | 010-00000-0-00000-82000-55000-0-0000 | custodial supplies |
| | | | | | | | | \$86.22 |
| | | | | | | | | Total Check Amount: |
| 013619 | ARAMARK(Cafeteria) | PV-220567 | 1/7/2022 | | 258000082909 | | 130-53100-0-00000-82000-55000-0-0000 | cafeteria maintenance supplies |
| | | | | | | | | \$103.57 |
| | | | | | | | | Total Check Amount: |
| 013295 | AT&T | PV-220584 | 12/25/2021 | | DEC 25, 2021 | | 010-00000-0-00000-82000-55000-0-0000 | long distance. ADT, fire alarm |
| | | | | | | | | \$70.04 |
| | | | | | | | | Total Check Amount: |
| 013515 | California Business Machines | PV-220583 | 12/30/2021 | | 287854 | | 010-00000-0-00000-72000-58000-0-0000 | toner maintenance charges |
| | | | | | | | | \$239.81 |
| | | | | | | | | Total Check Amount: |
| 001647 | DUCOR TELEPHONE CO | PV-220582 | 1/1/2022 | | 000411 C0282 | | 010-00000-0-00000-82000-55000-0-0000 | school phones |
| | | | | | | | | \$359.97 |
| | | | | | | | | Total Check Amount: |
| 013622 | EPIC Consulting | PV-220569 | 11/12/2021 | | 21-1112 | | 010-07200-0-11100-10000-58000-0-0000 | EPIC Consulting services: Parent University & recr |
| | | | | | | | | \$1,000.00 |
| | | | | | | | | Total Check Amount: |

J

10 Ducor Union Elementary School Distr
Tulare County Office of Education
Accounts Payable Final Prelist - 1/13/2022 3:43:30PM

1/13/2022
3:43:30PM

Page 2 of 4
APY500

*** FINAL ***
Batch No 381
Audit

| Vendor No | Vendor Name | Reference Number | Invoice Date | PO # | Invoice No | Separate Check | Account Code | Amount | Flag | EFT |
|-----------|------------------------------|------------------|--------------|------|--------------------|----------------|--------------------------------------------------------------------------------------------|------------|------|-----|
| 013625 | Fresno Chaffee | PV-220597 | 1/1/2022 | | booking ID 1305912 | | 010-07200-0-11100-10000-58000-0-0000 Fresno Chaffee trip for 8th grd to see Stingray Ba | \$1,000.00 | | |
| | | | | | | | 010-11000-0-00000-81100-43000-0-0000 roundup weedkiller for campus | \$460.00 | | |
| | | | | | | | Total Check Amount: | \$460.00 | | |
| 013441 | Home Depot Credit Services | PV-220563 | 11/30/2021 | | 8545175 | | 010-11000-0-00000-81100-43000-0-0000 roundup weedkiller for campus | \$40.94 | M | |
| | | | | | | | Total Check Amount: | \$40.94 | | |
| 012713 | IMAGESTUFF.COM (School Life) | PV-220562 | 11/4/2021 | | order# 200051352 | | 010-00000-0-11100-10000-43000-0-0000 trophies for Mrs. McGill cooking class | \$72.91 | | |
| | | | | | | | Total Check Amount: | \$72.91 | | |
| 013375 | INFINITY COMMUNICATIONS | PV-220598 | 1/3/2022 | | 13241 | | 010-00000-0-00000-72000-58000-0-0000 ECF Application Management services fee | \$1,563.12 | | |
| | | | | | | | Total Check Amount: | \$1,563.12 | | |
| 013349 | INTEGRATED DESIGNS By SOMAM | PV-220586 | 12/21/2021 | | 21848 | | 350-77150-0-00000-85000-62000-0-0000 Kindergarten classroom project | \$869.35 | | |
| | | | | | | | Total Check Amount: | \$869.35 | | |
| 013471 | Jeffrey Deik | PV-220570 | 1/4/2022 | | 828384 | | 010-07230-0-00000-36000-58000-0-0000 Reimbursement for fee paid for DOT physical | \$115.00 | | |
| | | | | | | | Total Check Amount: | \$115.00 | | |
| 013611 | Jesse Coronado | PV-220575 | 12/27/2021 | | 17007 | | 010-40350-0-11100-10000-43000-0-0000 reimbursement for purchase of food item for meetin | \$49.12 | | |
| | | | | | | | Total Check Amount: | \$49.12 | | |
| 013451 | Juan T. Reyes Consulting | PV-220565 | 12/1/2021 | | 0005 | | 010-31820-2-11100-10000-58000-0-0000 supervisor of mentor leadership program and life s | \$8,990.00 | J | |
| | | | | | | | Total Check Amount: | \$8,990.00 | | |

10 Ducor Union Elementary School Distr
Tulare County Office of Education
Accounts Payable Final Prelist - 1/13/2022 3:43:30PM

1/13/2022
3:43:30PM

Page 3 of 4
APY500

*** FINAL ***

Batch No 381

Audit

| Vendor No | Vendor Name | Reference Number | Invoice Date | PO # | Invoice No | Separate Check | Account Code | Amount | Flag | EFT |
|-----------|----------------------------|------------------|--------------|------|---------------------|----------------|----------------------------------------------------|--------------------|------|-----|
| 013517 | LEAF | PV-220581 | 12/21/2021 | | 12685179 | | 010-00000-0-00000-72000-58000-0-0000 | \$606.56 | | |
| | | | | | | | contract payment for lease on copiers | | | |
| | | | | | | | Total Check Amount: | \$606.56 | | |
| 013432 | Maryann Woodruff | PV-220587 | 12/6/2021 | | 6800 | | 010-32120-0-11100-10000-43000-0-0000 | \$41.45 | | |
| | Maryann Woodruff | PV-220588 | 12/12/2021 | | 00309 | | reimbursement for purchase of items for STEAM proj | | | |
| | Maryann Woodruff | PV-220589 | 12/12/2021 | | 164-641 | | 010-32120-0-11100-10000-43000-0-0000 | \$24.25 | | |
| | Maryann Woodruff | PV-220590 | 11/29/2021 | | 42203 | | 010-32120-0-11100-10000-43000-0-0000 | \$17.44 | | H |
| | | | | | | | Total Check Amount: | \$131.41 | | |
| 012443 | QUILL CORPORATION | PV-220572 | 1/6/2022 | | 22121014 | | 010-00000-0-00000-27000-43000-0-0000 | \$194.21 | | |
| | | | | | | | supplies for office | | | |
| | | | | | | | Total Check Amount: | \$194.21 | | |
| 013624 | Sarah West | PV-220591 | 12/4/2021 | | 2356 | | 010-32120-0-11100-10000-43000-0-0000 | \$84.93 | | |
| | Sarah West | PV-220592 | 12/14/2021 | | 7382 | | reimbursement for purchase of items for STEAM proj | | | |
| | Sarah West | PV-220593 | 12/14/2021 | | 8624 | | 010-32120-0-11100-10000-43000-0-0000 | \$15.31 | | |
| | Sarah West | PV-220594 | 12/7/2021 | | 345 | | 010-32120-0-11100-10000-43000-0-0000 | \$44.17 | | |
| | Sarah West | PV-220595 | 12/4/2021 | | 4371 | | 010-32120-0-11100-10000-43000-0-0000 | \$20.48 | | |
| | Sarah West | PV-220596 | 11/29/2021 | | 5062 | | 010-32120-0-11100-10000-43000-0-0000 | \$36.50 | | |
| | | | | | | | Total Check Amount: | \$207.21 | | |
| 012681 | SISC III | PV-220578 | 1/1/2022 | | 1/01/2022-1/31/2022 | | 010-00000-0-00000-00000-95024-0-0000 | \$21,833.30 | | G |
| | SISC III | | 1/1/2022 | | 1/01/2022-1/31/2022 | | Health & Welfare, includes for retirees | | | |
| | | | | | | | 010-00000-0-00000-00000-95028-0-0000 | \$2,292.40 | | G |
| | | | | | | | Total Check Amount: | \$24,125.70 | | |
| 012141 | SMART & FINAL | PV-220566 | 12/14/2021 | | 18401 | | 010-11000-0-11100-10000-43000-0-0000 | \$193.48 | | M |
| | | | | | | | STEAM project items purchased for TK,K,1st,2nd,3rd | | | |
| | | | | | | | Total Check Amount: | \$193.48 | | |
| 005384 | SOUTHERN CALIFORNIA EDISON | PV-220579 | 12/22/2021 | | Dec. 22, 2021 | | 010-00000-0-00000-82000-55000-0-0000 | \$1,781.31 | | |
| | | | | | | | electricity | | | |
| | | | | | | | Total Check Amount: | \$193.48 | | |

Page 4 of 4
APY500

| Vendor No | Vendor Name | Reference Number | Invoice Date | PO # | Invoice No | Separate Check | Account Code | Amount | Flag | EFT |
|-----------|--------------------------------|------------------|--------------|------|---------------|----------------|--------------------------------------------------------------------------------------------|------------|------|-----|
| 013547 | Strategic Labor Solutions, LLC | PV-220585 | 12/20/2021 | | 162 | | 010-00000-0-00000-72000-58000-0-0000 monthly contractual fee for csea negotiations | \$1,781.31 | | |
| | | | | | | | Total Check Amount: | | | |
| 012837 | THE HOME DEPOT PRO-Supplywoks | CM-220003 | 1/13/2022 | | 659550982 | | 010-00000-0-00000-82000-55000-0-0000 incorrect order | \$1,000.00 | | |
| | THE HOME DEPOT PRO-Supplywoks | PV-220574 | 12/14/2021 | | 658112016 | | 010-00000-0-00000-82000-55000-0-0000 sanitizer, mopframe, mop handle, scrub pads, Cloro | (\$171.19) | | |
| | | | | | | | Total Check Amount: | \$590.06 | | |
| 012709 | TULARE COUNTY OFFICE OF ED. | PV-220564 | 11/18/2021 | | 220636 | | 010-00000-0-00000-71100-52000-0-0000 no-show fee for board member to Fall Institute | \$418.87 | | |
| | TULARE COUNTY OFFICE OF ED. | PV-220573 | 12/3/2021 | | 220748 | | 010-00000-0-11100-10000-58000-0-0000 week trip to SCTCON, includes for counselors & tea | \$40.00 | | |
| | | | | | | | Total Check Amount: | \$4,359.60 | | |
| 013383 | VAST Networks | PV-220577 | 1/1/2022 | | 32810 | | 010-00000-0-00000-27000-59000-0-0000 internet connection | \$4,399.60 | | |
| | | | | | | | Total Check Amount: | \$195.00 | | |
| 013260 | VIRGINIA WALKER | PV-220571 | 1/6/2022 | | 044 | | 010-63000-0-11100-10000-43000-0-0000 reimbursement for purchase of food item for posti | \$195.00 | | |
| | | | | | | | Total Check Amount: | \$18.19 | | |
| 013505 | Visalia Adventure Park, Inc. | CM-220002 | 1/13/2022 | | 979 | | 010-07200-0-11100-10000-58000-0-0000 overcharge on event | \$18.19 | | |
| | Visalia Adventure Park, Inc. | PV-220576 | 12/17/2021 | | Event# 20,677 | | 010-07200-0-11100-10000-58000-0-0000 school function during Winter session | (\$90.00) | | |
| | | | | | | | Total Check Amount: | \$720.00 | | |
| | | | | | | | Total Check Amount: | \$630.00 | | |

Accounts Payable Final Prelist - 1/13/2022 3:43:30PM

*** FINAL ***

Batch No 381

Audit

Amount Flag EFT

Total District Payment Amount: \$49,804.72

| Vendor No | Vendor Name | Reference Number | Invoice Date | PO # | Invoice No | Separate Check | Account Code |
|-----------|-------------|------------------|--------------|------|------------|----------------|--------------|
|-----------|-------------|------------------|--------------|------|------------|----------------|--------------|

Accounts Payable Final Prelist - 1/13/2022 3:43:30PM

*** FINAL ***

Batch No 381

Audit

Amount Flag EFT

Vendor No Vendor Name Reference Number Invoice Date

PO # Invoice No

Separate Check Account Code

Batch No 381

Total Accounts Payable: \$49,804.72

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 49,804.72 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 | | \$48,831.80 |
| 130 | | \$103.57 |
| 350 | | \$869.35 |
| Total | | \$49,804.72 |



EKC Enterprises, Inc.
4658 E. Weathermaker Ave.
Fresno, CA 93703
(559) 438-0330

2.5
Estimate

BILL TO:

Ducor Union Elementary

| QUOTE DATE | QUOTE VALID THRU | ESTIMATE NO |
|------------|------------------|-------------|
| 2/1/2022 | 2/28/2022 | 3278 |

| Quantity | Part #/Description | Unit Price | Total |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|-----------|
| 10 | *Promethean AP-ASM-90 Manual height adjustable mobile stand for use with ActivPanel 75in+ | 817.50 | 8,175.00 |
| 10 | *Promethean- AP-AFS-TRAY Side mounted laptop shelf | 54.50 | 545.00 |
| 10 | TLP1006B TRIPP LITE : 10-Outlet Surge Protector Power Strip 6ft Cord 2880 Joules Black | 30.00 | 300.00 |
| 10 | N9Z-000 MICROSOFT : Microsoft All-in-One Media Keyboard USB Port English North America 1 License | 30.00 | 300.00 |
| 10 | INSTALLATION of 7 75' Promethean boards to Promethean stands and 1 86' Materials provided by customer | 500.00 | 5,000.00* |
| 10 | CROS-SW-DIS-EDU Chrome License | 39.00 | 390.00* |
| 1 | *Promethean 86" ACTIVPanel Titanium 4K *Promethean APM5YROSS-B AP-FSM Fixed height mobile stand for use with ActivPanel Extension, On Site Support, 5 years *Promethean CHRM2-CP4R128S Chromebox *Promethean PROFDEV-VIR Virtual Professional Development *Shipping Included | 4,199.00 | 4,199.00 |
| 9 | *Promethean 75" ACTIVPanel Titanium 4K *Promethean APM5YROSS-B ActivPanel Medium (for Titanium IFPs up to 80") - Extension, On Site Support, 5 years *Promethean CHRM2-CP4R128S Chromebox *Promethean PROFDEV-VIR Virtual Professional Development *Shipping Included | 3150.00 | 28,350.00 |

* means item is non-taxable

| | |
|---------------------|------------------|
| ITEM TOTAL | 47,259.00 |
| TAX | 3,454.19 |
| TOTAL AMOUNT | 50,713.19 |

3.1

Ducor Union Elementary School

 2/4/2022
1:25 PM

2021-2022

MONTHLY ATTENDANCE SUMMARY

Page 1

Month 7 - From 1/24/2022 Through 2/18/2022

Regular Program

| Grade Class Level No. | A Tchg Days | B Enroll- ment- Carried Fwd | C Gains | D Total Enroll- ment (B+C) | E Losses | F Ending Enroll- ment (D- E) | G Days Not Enroll | H Days Non- Apport Attend | I Actual Days (A*D) | J Total Apport Attend (A*D)-G-H | K Total A.D.A. (J/A) | L Percent Attend J/(I-G) | M Loss at End of School Day | YEAR TO DATE | | |
|--------------------------|-------------------|-----------------------------------------|------------|----------------------------------------|-------------|------------------------------------------|----------------------------|---------------------------------------|------------------------------|---------------------------------------------|-------------------------------|-----------------------------------|-----------------------------------------|---------------------------------|---------------------|-------------------------|
| | | | | | | | | | | | | | | N Total Apport Attendance | O Days Taught | P Total ADA (N/O) |
| TK 1 | 19 | 2 | 0 | 2 | 0 | 2 | 0 | 10 | 38 | 28 | 1.47 | 73.68% | 0 | 155 | 104 | 1.49 |
| TK TOTAL | 19 | 2 | 0 | 2 | 0 | 2 | 0 | 10 | 38 | 28 | 1.47 | 73.68% | 0 | 155 | 104 | 1.49 |
| K 1 | 19 | 11 | 0 | 11 | 0 | 11 | 0 | 13 | 209 | 196 | 10.32 | 93.78% | 0 | 1118 | 104 | 10.75 |
| K TOTAL | 19 | 11 | 0 | 11 | 0 | 11 | 0 | 13 | 209 | 196 | 10.32 | 93.78% | 0 | 1118 | 104 | 10.75 |
| 1 34 | 19 | 13 | 0 | 13 | 0 | 13 | 0 | 24 | 247 | 223 | 11.74 | 90.28% | 0 | 1076 | 104 | 10.35 |
| 1 TOTAL | 19 | 13 | 0 | 13 | 0 | 13 | 0 | 24 | 247 | 223 | 11.74 | 90.28% | 0 | 1076 | 104 | 10.35 |
| 2 29 | 19 | 15 | 1 | 16 | 0 | 16 | 0 | 11 | 304 | 293 | 15.42 | 96.38% | 0 | 1543 | 104 | 14.84 |
| 2 TOTAL | 19 | 15 | 1 | 16 | 0 | 16 | 0 | 11 | 304 | 293 | 15.42 | 96.38% | 0 | 1543 | 104 | 14.84 |
| 3 18 | 19 | 16 | 0 | 16 | 0 | 16 | 0 | 19 | 304 | 285 | 15.00 | 93.75% | 0 | 1506 | 104 | 14.48 |
| 3 TOTAL | 19 | 16 | 0 | 16 | 0 | 16 | 0 | 19 | 304 | 285 | 15.00 | 93.75% | 0 | 1506 | 104 | 14.48 |
| TOTAL TK-3 | 19 | 57 | 1 | 58 | 0 | 58 | 0 | 77 | 1102 | 1025 | 53.95 | 93.01% | 0 | 5398 | 104 | 51.90 |
| 4 4 | 19 | 11 | 0 | 11 | 0 | 11 | 0 | 10 | 209 | 199 | 10.47 | 95.22% | 0 | 1028 | 104 | 9.88 |
| 4 TOTAL | 19 | 11 | 0 | 11 | 0 | 11 | 0 | 10 | 209 | 199 | 10.47 | 95.22% | 0 | 1028 | 104 | 9.88 |
| 5 5 | 19 | 15 | 0 | 15 | 0 | 15 | 0 | 10 | 285 | 275 | 14.47 | 96.49% | 0 | 1485 | 104 | 14.28 |
| 5 TOTAL | 19 | 15 | 0 | 15 | 0 | 15 | 0 | 10 | 285 | 275 | 14.47 | 96.49% | 0 | 1485 | 104 | 14.28 |
| 6 6 | 19 | 14 | 0 | 14 | 0 | 14 | 0 | 27 | 266 | 239 | 12.58 | 89.85% | 0 | 1293 | 104 | 12.43 |
| 6 TOTAL | 19 | 14 | 0 | 14 | 0 | 14 | 0 | 27 | 266 | 239 | 12.58 | 89.85% | 0 | 1293 | 104 | 12.43 |
| TOTAL 4-6 | 19 | 40 | 0 | 40 | 0 | 40 | 0 | 47 | 760 | 713 | 37.53 | 93.82% | 0 | 3806 | 104 | 36.60 |
| 7 7 | 19 | 14 | 0 | 14 | 0 | 14 | 0 | 10 | 266 | 256 | 13.47 | 96.24% | 0 | 1298 | 104 | 12.48 |
| 7 TOTAL | 19 | 14 | 0 | 14 | 0 | 14 | 0 | 10 | 266 | 256 | 13.47 | 96.24% | 0 | 1298 | 104 | 12.48 |
| 8 10 | 19 | 13 | 0 | 13 | 0 | 13 | 0 | 7 | 247 | 240 | 12.63 | 97.17% | 0 | 1188 | 104 | 11.42 |
| 8 TOTAL | 19 | 13 | 0 | 13 | 0 | 13 | 0 | 7 | 247 | 240 | 12.63 | 97.17% | 0 | 1188 | 104 | 11.42 |
| TOTAL 7-8 | 19 | 27 | 0 | 27 | 0 | 27 | 0 | 17 | 513 | 496 | 26.11 | 96.69% | 0 | 2486 | 104 | 23.90 |
| PROGRAM | 19 | 124 | 1 | 125 | 0 | 125 | 0 | 141 | 2375 | 2234 | 117.58 | 94.06% | 0 | 11690 | 104 | 112.40 |

Principal Signature

Date

To the best of my knowledge, the information contained on this document is accurate and complete.

Ducor Union Elementary School

2/4/2022
1:25 PM

2021-2022

MONTHLY ATTENDANCE SUMMARY

Page 2

Month 7 - From 1/24/2022 Through 2/18/2022

Program T TK Program

| Grade Class Level No. | A | B | C | D | E | F | G | H | I | J | K | L | M | YEAR TO DATE | | |
|--------------------------|-----------|-------------------------|----------|-------------------------|----------|--------------------------|-----------------|------------------------|-------------------|-------------------------------|--------------------|------------------------|--------------------------------|-------------------------|-------------|-----------------|
| | Tchg Days | Enroll-ment Carried Fwd | Gains | Total Enroll-ment (B+C) | Losses | Ending Enroll-ment (D-E) | Days Not Enroll | Days Non-Apport Attend | Actual Days (A*D) | Total Apport Attend (A*D)-G-H | Total A.D.A. (J/A) | Percent Attend J/(I-G) | Loss at End of Last School Day | Total Apport Attendance | Days Taught | Total ADA (N/O) |
| TK 1 | 19 | 1 | 0 | 1 | 0 | 1 | 0 | 9 | 19 | 10 | 0.53 | 52.63% | 0 | 82 | 104 | 0.79 |
| TK TOTAL | 19 | 1 | 0 | 1 | 0 | 1 | 0 | 9 | 19 | 10 | 0.53 | 52.63% | 0 | 82 | 104 | 0.79 |
| TOTAL TK-3 | 19 | 1 | 0 | 1 | 0 | 1 | 0 | 9 | 19 | 10 | 0.53 | 52.63% | 0 | 82 | 104 | 0.79 |
| PROGRAM | 19 | 1 | 0 | 1 | 0 | 1 | 0 | 9 | 19 | 10 | 0.53 | 52.63% | 0 | 82 | 104 | 0.79 |
| REPORT | 19 | 125 | 1 | 126 | 0 | 126 | 0 | 150 | 2394 | 2244 | 118.11 | 93.73% | 0 | 11772 | 104 | 113.19 |

Principal Signature

Date

To the best of my knowledge, the information contained on this document is accurate and complete.

3.2



Isidro Rodriguez <superintendent@ducor.k12.ca.us>

Re: Data

2 messages

Jesse Coronado <jessecoronado@ducor.k12.ca.us>

Tue, Feb 1, 2022 at 1:13 PM

To: Michael Figueroa <michael@figueroaconsulting.com>

Cc: Dana Hight <danahight@ducor.k12.ca.us>, Isidro Rodriguez <superintendent@ducor.k12.ca.us>

This is great, thank you! Good job Ducor team! As soon as it is cleaned up we can share it with the team and board. Overall, I think the learning that teachers had during intercession ultimately has impacted our Rtl started a few weeks ago. Can we schedule a meeting this week to review and plan next steps?

JC

On Tue, Feb 1, 2022 at 1:06 PM Michael Figueroa <michael@figueroaconsulting.com> wrote:

Hi yall,

Data likely needs to be cleaned up a bit...but this is what I am seeing for BAS growth:

Average growth all: 1.35 levels

Average growth winter session: 1.32

Average growth NOT winter session: 1.44

Lots to talk about. I wouldn't be discouraged by the comparison data though b/c of the sample size. Also, likely need to clean some more stuff (around kids who didn't actually attend, etc.) to make the data cleaner.

Overall...I think you should be happy with 1.35 overall growth average.

Of 105 kids with 1st and 2nd BAS -- 77 improved (73%)

Michael

--

Michael Figueroa, CEO

Figueroa Consulting

ph: 661-489-8068

cell: 661-858-4770

email: michael@figueroaconsulting.com

--
Dr. Jesse Coronado, Ed.D.

Principal

Ducor Elementary School

23761 Ave 56,

P.O Box 249

Ducor, CA. 93218-249

Office: 559-534-2261

Fax: 559-534-2271

"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel."--Maya Angelou.

Isidro Rodriguez <superintendent@ducor.k12.ca.us>

Tue, Feb 1, 2022 at 1:55 PM

To: Jesse Coronado <jessecoronado@ducor.k12.ca.us>



Ducor Union Elementary eSports Program

Mission Statement: Our aim is to provide our students with quality eSports opportunities in a safe environment.

Community: Sports are a great way for building friendships and Esports is no different. We want to support friendly inter-school play as well as competitive play. This ensures students will play with like minded players. Esports transforms a relatively isolated experience into a social one.

Teamwork: For our students to be successful, players must learn to work together to accomplish a common goal and set aside personal benefit.

Skill Development: Students will practice their teamwork, communication, Strategic thinking, sportsmanship, leadership, adaptability, resilience, problem solving and self regulation skills.

Engagement: Students will develop the aforementioned skills above and with the positive experiences built during eSports will help build self-confidence and enthusiasm.

Achievements: esports gives opportunities for those who are more hesitant in playing in regular sports or other activities that they do not find engaging and allows them to succeed at something they love. This success allows them to represent the school and the Ducor community.

Social Emotional Learning: (SEL) Games give an avenue for storytelling and narratives that can positively affect the players by teaching them valuable lessons such as empathy, humility, and the pitfalls of violence. More specifically, e-sport competition teaches the competitors to deal with their own egos and emotions in a healthy manner.



*Video image from Leagueofschool.org

College and Career

Readiness: The video game industry is still developing, and as such so are the career options. Careers include software developers, operation managers, Information Technology, Graphic Design and game designers. In addition colleges are offering esports scholarships, and more than 300 colleges have esports teams.

Ducor ESports:

Currently our esports program has roughly 30 students in attendance. The grade span is currently 4th-8th grade only. Students are responsible for maintaining a GPA of C's or better in all subject areas. Students attend meetings every Thursday during lunch recess and lunch break. Which is roughly 45 minutes of Game Based Learning time.

Games Played: Ratings for these games are *E* for Everyone and *T* for Teen.



*Additional Information: The Benefits of Academic Sports



California League of Esports

Chart of Games

K

| PATHWAY — E S P O R T S — | Xbox | Playstation | Switch | Chromebook | iPad | macOS | PC Laptop (Low-end) | PC Laptop (Minimum) | PC Desktop (Minimum) |
|----------------------------------------------------------------------------------------------------------------------------------------------|------|---------------------------------------------------------|--------|------------|------------------------------------------------------------------------------------------------------|-------|---------------------|---------------------|----------------------|
| League of Legends | | | | | | Y | Y | Y | Y |
| Overwatch | Y | Y | Y | | | | M | Y | Y |
| Hearthstone | | | | Y | Y | Y | Y | Y | Y |
| Fortnite | Y | Y | Y | | Y | Y | Y | Y | Y |
| Super Smash Bros: Ultimate | | | Y | | | | | | |
| Rocket League | Y | Y | Y | | | Y | Y | Y | Y |
| FIFA | Y | Y | Y | | | | M | Y | Y |
| Madden | Y | Y | | | | | M | Y | Y |
| NBA2K | Y | Y | Y | | | | M | Y | Y |
| Notice: Games might not allow online play across different platforms. Check cross-play availability if teammates vary in hardware. | | Low End CPU: 3GHz Processor / 2.5 GHz Dual Core | | | Minimum CPU: Intel Core i3 / AMD Phenom X3 8650 (Or higher) | | | | |
| | | Low End GPU: Intel HD 4000 (integrated graphics) | | | Minimum GPU: NVIDIA GeForce GTX 460 / ATI Radeon HD 4850 / Intel HD Graphics 4400 (Or higher) | | | | |

Y = Yes

M = Maybe (depending on the CPU/GPU above)

*Information of required equipment for eSports.

How to Fund Esports in this article, it tells schools how to use the Learning Loss Mitigation Funds to purchase eSports equipment/technology.

Student Expectations Letter

2021-2022

Greetings Parents,

Ducor Union Elementary School District wants to provide many opportunities for your child to have a fun and engaging school year. This year we have more extra curricular activities than ever before, which means more opportunities for your child to engage in something they love to do. We offer cooking classes both beginner and advanced, we also offer arts and crafts, Kid Power, E-sports, Music and Reading Revolution. We are so excited to have your child join in on the fun!

At Ducor school we want to have a well rounded educational program. We have expectations that all students must adhere to in order to participate in these extra curricular activities. Encourage your child to join as many clubs as they can and to do their very best in class so that they can be a part of our awesome programs. Below you will find our school wide expectations:

- ❖ Students must maintain a C average in all classes including PE or a minimum GPA (Grade Point Average) of 2.0 in all subject areas. This means no D's or F's on their Progress Reports. All grades consist of effort, behavior, assignments , along with quizzes, tests, and projects. This is to ensure that Academics is the main focus for the students.
- ❖ Students must also have no behavioral issues. Grades 6th-8th may not have more than 5 write-ups a Trimester in order to participate.
- ❖ Students' work must be completed and are working for the following week's game/tournaments.
- ❖ Teachers will have their grades completed by Monday each week so students will know if they have to attend study hall.
- ❖ Students who do not complete their assignments will be required to attend study hall until their grades improve and they have completed their missing assignments.
- ❖ Students who do not attend mandatory study hall, will automatically need to make up any missed time.
- ❖ Students in grades 6th-8th will be placed on Academic Review if they continue to be in study hall. If a student can not raise their grades after attending study hall, a parent/student meeting will take place where the student will then be put on Academic Warning and then followed by Academic Probation. Our Students Success is our top priority.
- ❖ Student success is important. We expect all students to meet these expectations. Academic support is always available for all students. Thank you for your support.

*If for any reason you have concerns please contact the school so that a meeting can be set up with your child's teacher and school administrator.

Teachers/Coaches and Administrators have collaborated to set these expectations for our students in order to teach them the importance of responsibility, hardwork and the value of their education. This contract is to help everyone to be aware of the expectations not only for students and parents but your staff as well. We are connecting with you to support us in implementing these expectations. We hope to continue to build a partnership with our student's parents and guardians.

Sincerely,
Ducor staff and Coaches

Students Name/Nombre del Estudiante: _____

Students signature/Firma del Estudiante: _____

Parent's/Guardian's Name/Nombre del Padre: _____

Parent's/Guardian's signature/Firma del Padre: _____

Saludos Padres,

El Distrito Escolar Primario Unión de Ducor desea brindar muchas oportunidades para que su hijo tenga un año escolar divertido y atractivo. Este año tenemos más actividades extracurriculares que nunca, lo que significa más oportunidades para que su hijo participe en algo que le encanta hacer. Ofrecemos clases de cocina para principiantes y avanzados, también ofrecemos artes y manualidades, Kid Power, E-sports, Música y Reading Revolution. ¡Estamos muy emocionados de que su hijo se una a la diversión!

En la escuela Ducor queremos tener un programa educativo completo. Tenemos expectativas que todos los estudiantes deben cumplir para poder participar en estas actividades extracurriculares. Anime a su hijo a unirse a tantos clubes como pueda y a hacer lo mejor que pueda en clase para que pueda ser parte de nuestros increíbles programas. Abajo encontrará las expectativas de nuestra escuela.

Expectativas:

- ❖ Los estudiantes deben mantener un promedio de C en todas las clases, incluida la educación física o un GPA (promedio de calificaciones) mínimo de 2.0 en todas las materias. Esto significa que no hay D ni F en sus informes de progreso. Todas las calificaciones consisten en esfuerzo, comportamiento, asignaciones, junto con cuestionarios, pruebas y proyectos. Esto es para asegurar que lo académico sea el enfoque principal de la escuela y los estudiantes.
- ❖ Los estudiantes tampoco deben tener problemas de comportamiento en ninguna clase. Los grados superiores de 6º a 8º no pueden tener más de 5 reseñas por trimestre para poder participar.
- ❖ El trabajo de los estudiantes debe estar terminado y está trabajando para el juego / torneo de la semana siguiente.

- ❖ Los maestros completarán sus calificaciones el lunes de cada semana para asegurarse de que los estudiantes sepan si tienen un salón de estudio o no.
- ❖ Los estudiantes que no completen sus asignaciones deberán asistir a la sala de estudio hasta que sus calificaciones mejoren y hayan completado las asignaciones faltantes.
- ❖ Los estudiantes que no asistan a la sala de estudio obligatoria, deberán recuperar automáticamente el tiempo perdido.
- ❖ Los estudiantes de 6° a 8° serán puestos en revisión académica si continúan en la sala de estudio. Si un estudiante no puede mejorar sus calificaciones después de intentar estar en la sala de estudio, se llevará a cabo una reunión donde el estudiante será puesto en Advertencia Académica y luego seguido de Probatoria Académica. El éxito de nuestros estudiantes es nuestra principal prioridad.
- ❖ Cualquier estudiante que no cumpla con estas expectativas puede ser retirado de la actividad para que pueda concentrar sus esfuerzos en la escolarización.

* Si por alguna razón tiene inquietudes, comuníquese con la escuela para que se pueda programar una reunión con los maestros de su hijo y la administración de la escuela.

Los maestros / entrenadores y la administración han colaborado para establecer estas expectativas para nuestros estudiantes con el fin de enseñarles la importancia de la responsabilidad, el trabajo duro y el valor de la educación. Este contrato es para que todos estén conscientes de las expectativas no solo para los estudiantes y los padres, sino también para el personal. Nos estamos conectando con usted para ayudarnos a implementar estas expectativas. Queremos continuar construyendo una sociedad con los padres y tutores de nuestros estudiantes.

Atentamente,
Personal y entrenadores de Ducor

Nombre del estudiante: _____

Firma del Estudiante: _____

Nombre del padre: _____

Firma del Padre: _____

Staff Positions: 2021-22 Ducor School

Classroom Grade Staff Member Status Classification

| | | | |
|---|------------------|-------------|--------------|
| K | Maria Barajas | Intern | self-contain |
| 1 | Rachel Centeno | Intern | self-contain |
| 2 | Maryann Woodruff | Credential | self-contain |
| 3 | Virginia Walker | Credential | self-contain |
| 4 | Jennifer Hunter | Intern | self-contain |
| 5 | Steve McCurry | Prelim Cred | self-contain |
| 6 | Rudy Morales | Intern | self-contain |
| 7 | Kasey Peevy | Intern | self-contain |
| 8 | Sarah West | Intern | self-contain |
| 9 | Louis Smith | Credential | PE |

Cafeteria

| | | | |
|---|---------------|----|----------------------|
| 1 | Rosalba Avila | PT | Nutrition Department |
| 2 | Jacque Farmer | PT | Nutrition Department |

Custodians

| | | | |
|---|---------------------------------|----|--------------------------|
| 1 | Noe Rodriguez | FT | Maintenance/bus driver |
| 2 | Jeff Delk | PT | Bus driver/Comp. Tech. |
| 3 | Athena Padilla | PT | Custodian Evenings |
| 4 | Raymundo Compos (Jose Ochoa) | PT | Custodian Evenings/ESSER |
| 5 | Custodian Days | FT | Custodian Days/ESSER |

Librarian Technician

| | | | |
|---|------------|----|-----------------|
| 1 | Lisa Lucio | PT | Library/support |
|---|------------|----|-----------------|

Life Coach

| | | | |
|---|---------------|----|------------|
| 1 | Juan Reyes | PT | Life Coach |
| 2 | Lupita Flores | FT | Life Coach |

Office

| | | | |
|---|--------------------|----|------------------------|
| 1 | Ruby Navarro | FT | Office Administrator |
| 2 | Jeremiah Sosa | FT | Business Manager/Music |
| 3 | Isidro Rodriguez | FT | Superintendent |
| 4 | Dr. Jesse Coronado | FT | Principal |

Resources/Support

| | | | |
|----|-----------------------|--|----------------------------------|
| 1 | Ms. Alyssa Gonzales | | Resource Specialist Teacher |
| 2 | Mrs. Melissa DiMaggio | | TCOE Psychologist |
| 3 | Mrs. Elizabeth Avila | | TCOE Speech & Language Teacher |
| 4 | Deaf and Hearing | | TCOE/ as needed |
| 5 | Nurse | | TCOE/ as needed |
| 6 | Dana Hight | | Coach/Contract |
| 7 | Michael Figueroa | | Consultant for CSI grant |
| 8 | Stephanie Rodriguez | | Instructional Aide/CHOICES |
| 9 | Shawn McCurry | | Instructional Aide/ESSER |
| 10 | Alicia Orozco | | Substitute Teacher/ESSER |
| 11 | Ms. Yanin Ayon | | TCOE Triage Social Worker Intern |
| 12 | Ms. Raquel Lule | | TCOE, Triage Social Worker 1 |
| 13 | Dr. Jane Mitchell | | Intern Support Mentor Teacher |
| 14 | Mrs. Connie Smith | | Intern Support Mentor Teacher |
| 15 | Tyger Bates | | LCAP Support/Contract |
| 16 | Maria McDowell | | Instruction Aide/Support/ESSER |

After School

| | | | |
|---|-----------------|--|------------------------------------|
| 1 | Choices Program | | 5 days a week/ 3 hours a day |
| 2 | Brian Crabtree | | English Second Language Instructor |
| 3 | Mary McGill | | Arts and Craft/Cooking |
| 5 | DPTA | | meets weekly/monthly as needed |

Tulare County Office of Education

Committed to Students, Support & Service

3.5

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 13, 2022

TO: District Superintendents and District Filing Officers

FROM: Fernie Marroquin, Ed.D., Assistant Superintendent
Business Services

SUBJECT: 2021-2022 Statement of Economic Interests
Form 700 – **Due April 1, 2022**

Enclosed is a copy of the 2021-2022 Statement of Economic Interests Form 700 and Reference Pamphlet. The materials contain instructions and the forms necessary for your governing board members and designated employees to complete and file their annual statements by April 1, 2022. Please refer to your district's Conflict of Interest Code for a list of designated employees.

Your district's designated filing officer should date-stamp all completed statements when received. The completed statements are to be kept at your district office and should be made available to the public upon request.

In addition, you are required to file a copy of all statements with the Tulare County Clerk of the Board (also referred to as the County Filing Official), **unless your district is a multi-county agency**. Send a copy of all statements, either by email or U.S. Mail to:

Tulare County Clerk of the Board

Attention: Melinda Benton

2800 W. Burrell Ave.

Visalia CA 93291

OR

Email: clerkoftheboard@tularecounty.ca.gov

Phone: 559-636-5000

If you have any questions, please feel free to contact me at 559-733-6474.

Thank you.

FM/sd

Enclosures

2021-2022 Statement of Economic Interests



Form 700

A Public Document

Table of Contents

| | |
|--------------------------------------------------------|------|
| Quick Start Guide | p.2 |
| Who? Where? How? When? | p.3 |
| Types of Statements | p.4 |
| Cover Page and Schedules | |
| Cover Page | p.5 |
| Schedule A-1 (<i>Investments</i>) | p.7 |
| Schedule A-2 (<i>Business Entities/Trusts</i>) | p.9 |
| Schedule B (<i>Real Property</i>) | p.11 |
| Schedule C (<i>Income</i>) | p.13 |
| Schedule D (<i>Gifts</i>) | p.15 |
| Schedule E (<i>Travel Payments</i>) | p.17 |
| Restrictions and Prohibitions | p.19 |
| Q & A | p.20 |

Helpful Resources

- Video Tutorials
- Reference Pamphlet
- Excel Version
- FAQs
- Gift and Travel Fact Sheet for State and Local Officials

California Fair Political Practices Commission

1102 Q Street, Suite 3000 • Sacramento, CA 95811

Email Advice: advice@fppc.ca.gov

Toll-free advice line: 1 (866) ASK-FPPC • 1 (866) 275-3772

Telephone: (916) 322-5660 • Website: www.fppc.ca.gov

December 2021

Quick Start Guide

Detailed instructions begin on page 3.

WHEN IS THE ANNUAL STATEMENT DUE?

- March 1 – Elected State Officers, Judges and Court Commissioners, State Board and Commission members listed in Government Code Section 87200
- April 1 – Most other filers

WHERE DO I FILE?

Most people file the Form 700 with their agency. If you're not sure where to file your Form 700, contact your filing officer or the person who asked you to complete it.

ITEMS TO NOTE!

- The Form 700 is a public document.
- Only filers serving in active military duty may receive an extension on the filing deadline.
- You must also report interests held by your spouse or registered domestic partner.
- Your agency's conflict of interest code will help you to complete the Form 700. You are encouraged to get your conflict of interest code from the person who asked you to complete the Form 700.

NOTHING TO REPORT?

Mark the "No reportable interests" box on Part 4 of the Cover Page, and submit only the signed Cover Page. Please review each schedule carefully!

| Schedule | Common Reportable Interests | Common Non-Reportable Interests |
|-------------------------------|---------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| A-1: Investments | Stocks, including those held in an IRA or 401K. Each stock must be listed. | Insurance policies, government bonds, diversified mutual funds, funds similar to diversified mutual funds. |
| A-2: Business Entities/Trusts | Business entities, sole proprietorships, partnerships, LLCs, corporations and trusts. (e.g., Form 1099 filers). | Savings and checking accounts, and annuities. |
| B: Real Property | Rental property in filer's jurisdiction, or within two miles of the boundaries of the jurisdiction. | A residence used exclusively as a personal residence (such as a home or vacation property). |
| C: Income | Non-governmental salaries. Note that filers are required to report only half of their spouse's or partner's salary. | Governmental salary (from school district, for example). |
| D: Gifts | Gifts from businesses, vendors, or other contractors (meals, tickets, etc.). | Gifts from family members. |
| E: Travel Payments | Travel payments from third parties (not your employer). | Travel paid by your government agency. |

Note: Like reportable interests, non-reportable interests may also create conflicts of interest and could be grounds for disqualification from certain decisions.

QUESTIONS?

- advice@fppc.ca.gov
- (866) 275-3772 Mon-Thurs, 9-11:30 a.m.

E-FILEING ISSUES?

- If using your agency's system, please contact technical support at your agency.
- If using FPPC's e-filing system, write to form700@fppc.ca.gov.

What's New

Gift Limit Increase

The gift limit increased to **\$520** for calendar years **2021** and **2022**. The gift limit in 2020 was **\$500**.

Who must file:

- Elected and appointed officials and candidates listed in Government Code Section 87200
- Employees, appointed officials, and consultants filing pursuant to a conflict of interest code ("code filers"). **Obtain your disclosure categories, which describe the interests you must report, from your agency;** they are not part of the Form 700
- Candidates running for local elective offices that are designated in a conflict of interest code (e.g., county sheriffs, city clerks, school board trustees, and water board members)

Exception:

- Candidates for a county central committee are not required to file the Form 700
- Employees in newly created positions of existing agencies

For more information, see Reference Pamphlet, page 3, at www.fppc.ca.gov.

Where to file:

87200 Filers

| | | |
|----------------------|---|-----------------------------|
| State offices | ➔ | Your agency |
| Judicial offices | ➔ | The clerk of your court |
| Retired Judges | ➔ | Directly with FPPC |
| County offices | ➔ | Your county filing official |
| City offices | ➔ | Your city clerk |
| Multi-County offices | ➔ | Your agency |

Code Filers — State and Local Officials, Employees, and Consultants Designated in a Conflict of Interest

Code: File with your agency, board, or commission unless otherwise specified in your agency's code (e.g., Legislative staff files directly with FPPC). In most cases, the agency, board, or commission will retain the statements.

Members of Newly Created Boards and Commissions: File with your agency or with your agency's code reviewing body pursuant to Regulation 18754.

Employees in Newly Created Positions of Existing Agencies: File with your agency or with your agency's code reviewing body. (See Reference Pamphlet, page 3.)

Candidates file as follow:

| | | |
|----------------------------------------------------------|---|----------------------------------------------------------------------------|
| State offices, Judicial offices and multi-county offices | ➔ | County elections official with whom you file your declaration of candidacy |
| County offices | ➔ | County elections official |
| City offices | ➔ | City Clerk |
| Public Employee's Retirement System (CalPERS) | ➔ | CalPERS |
| State Teacher's Retirement Board (CalSTRS) | ➔ | CalSTRS |

How to file:

The Form 700 is available at www.fppc.ca.gov. Form 700 schedules are also available in Excel format. Each Statement must have a handwritten "wet" signature or "secure electronic signature," meaning either (1) a signature submitted using an approved electronic filing system or (2) if permitted by the filing officer, a digital signature submitted via the filer's agency email address. (See Regulations 18104 and 18757.) Companies such as Adobe and DocuSign offer digital signature services. All statements are signed under the penalty of perjury and must be verified by the filer. See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

When to file:

Annual Statements

➔ March 1, 2022

- Elected State Officers
- Judges and Court Commissioners
- State Board and State Commission Members listed in Government Code Section 87200

➔ April 1, 2022

- Most other filers

Individuals filing under conflict of interest codes in city and county jurisdictions should verify the annual filing date with their filing official or filing officer.

Statements postmarked by the filing deadline are considered filed on time.

Statements of 30 pages or less may be emailed or faxed by the deadline as long as the originally signed paper version is sent by first class mail to the filing official within 24 hours.

Assuming Office and Leaving Office Statements

Most filers file within 30 days of assuming or leaving office or within 30 days of the effective date of a newly adopted or amended conflict of interest code.

Exception:

If you assumed office between October 1, 2021, and December 31, 2021, and filed an assuming office statement, you are not required to file an annual statement until March 1, 2023, or April 1, 2023, whichever is applicable. The annual statement will cover the day after you assumed office through December 31, 2022. (See Reference Pamphlet, page 6, for additional exceptions.)

Candidate Statements

File no later than the final filing date for the declaration of candidacy or nomination documents. A candidate statement is not required if you filed an assuming office or annual statement for the same jurisdiction within 60 days before filing a declaration of candidacy or other nomination documents.

Late Statements

There is no provision for filing deadline extensions unless the filer is serving in active military duty. (See page 19 for information on penalties and fines.)

Amendments

Statements may be amended at any time. You are only required to amend the schedule that needs to be revised. It is not necessary to amend the entire filed form. Obtain amendment schedules at www.fppc.ca.gov.

Types of Statements

Assuming Office Statement:

If you are a newly appointed official or are newly employed in a position designated, or that will be designated, in a state or local agency's conflict of interest code, your assuming office date is the date you were sworn in or otherwise authorized to serve in the position. If you are a newly elected official, your assuming office date is the date you were sworn in.

- Report: Investments, interests in real property, and business positions held on the date you assumed the office or position must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the date you assumed the office or position.

For positions subject to confirmation by the State Senate or the Commission on Judicial Appointments, your assuming office date is the date you were appointed or nominated to the position.

- Example: Maria Lopez was nominated by the Governor to serve on a state agency board that is subject to state Senate confirmation. The assuming office date is the date Maria's nomination is submitted to the Senate. Maria must report investments, interests in real property, and business positions she holds on that date, and income (including loans, gifts, and travel payments) received during the 12 months prior to that date.

If your office or position has been added to a newly adopted or newly amended conflict of interest code, use the effective date of the code or amendment, whichever is applicable.

- Report: Investments, interests in real property, and business positions held on the effective date of the code or amendment must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the effective date of the code or amendment.

Annual Statement:

Generally, the period covered is January 1, 2021, through December 31, 2021. If the period covered by the statement is different than January 1, 2021, through December 31, 2021, (for example, you assumed office between October 1, 2020, and December 31, 2020 or you are combining statements), you must specify the period covered.

- Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement must be reported. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2021.

- If your disclosure category changes during a reporting period, disclose under the old category until the effective date of the conflict of interest code amendment and disclose under the new disclosure category through the end of the reporting period.

Leaving Office Statement:

Generally, the period covered is January 1, 2021, through the date you stopped performing the duties of your position. If the period covered differs from January 1, 2021, through the date you stopped performing the duties of your position (for example, you assumed office between October 1, 2020, and December 31, 2020, or you are combining statements), the period covered must be specified. The reporting period can cover parts of two calendar years.

- Report: Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2021.

Candidate Statement:

If you are filing a statement in connection with your candidacy for state or local office, investments, interests in real property, and business positions held on the date of filing your declaration of candidacy must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the date of filing your declaration of candidacy is reportable. Do not change the preprinted dates on Schedules A-1, A-2, and B.

Candidates running for local elective offices (e.g., county sheriffs, city clerks, school board trustees, or water district board members) must file candidate statements, as required by the conflict of interest code for the elected position. The code may be obtained from the agency of the elected position.

Amendments:

If you discover errors or omissions on any statement, file an amendment as soon as possible. You are only required to amend the schedule that needs to be revised; it is not necessary to refile the entire form. Obtain amendment schedules from the FPPC website at www.fppc.ca.gov.

Note: Once you file your statement, you may not withdraw it. All changes must be noted on amendment schedules.

Expanded Statement:

If you hold multiple positions subject to reporting requirements, you may be able to file an expanded statement for each position, rather than a separate and distinct statement for each position. The expanded statement must cover all reportable interests for all jurisdictions and list all positions for which it is filed. The rules and processes governing the filing of an expanded statement are set forth in Regulation 18723.1

**STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT**

Date Initial Filing Received
Filing Official Use Only

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, 2021, through December 31, 2021.
- ☐ **Leaving Office:** Date Left / / (Check one circle.)
- ☐ **Assuming Office:** Date assumed / /
- ☐ **Candidate:** Date of Election and office sought, if different than Part 1:
- ☐ **None:** The period covered is January 1, 2021, through the date of leaving office.
- ☐ **None:** The period covered is / / through the date of leaving office.

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 EMAIL 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.)

Print

Clear

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 separate and distinct statements with each agency. To simplify your filing obligations, in some cases you may instead complete a single expanded statement and file it with each agency.
 - The rules and processes governing the filing of an expanded statement are set forth in Regulation 18723.1. To file an expanded statement for multiple positions, enter the name of each agency with which you are required to file and your position title with each agency in the space provided. **Do not use acronyms.** Attach an additional sheet if necessary. Complete one statement disclosing all reportable interests for all jurisdictions. Then file the expanded statement with each agency as directed by Regulation 18723.1(c).

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 annual filing deadline must file a separate assuming office statement. In subsequent years, the city council member may expand their 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 the Counties of Placer and Yuba. The City is located within Placer County. Brian may complete one expanded statement to disclose all reportable interests for both offices and list both positions on the Cover Page. Brian will file the expanded statement with each the City and the District as directed by Regulation 18723.1(c).

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 2021 annual statement, **do not** change the pre-printed dates to reflect 2022. Your annual statement is used for reporting the **previous year's** economic interests. Economic interests for your annual filing covering January 1, 2022, through December 31, 2022, will be disclosed on your statement filed in 2023. See Reference Pamphlet, page 4.

Combining Statements: Certain types of statements for the same position 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. Each statement must have an original “wet” signature unless filed with a secure electronic signature. (See page 3 above.) All statements must be signed under penalty of perjury and be verified by the filer pursuant to Government Code Section 81004. See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

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.

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

- ☐ Stock ☐ Other (Describe) _____
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/21 ACQUIRED _____/_____/21 DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

- ☐ Stock ☐ Other (Describe) _____
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/21 ACQUIRED _____/_____/21 DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

- ☐ Stock ☐ Other (Describe) _____
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/21 ACQUIRED _____/_____/21 DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

- ☐ Stock ☐ Other (Describe) _____
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/21 ACQUIRED _____/_____/21 DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

- ☐ Stock ☐ Other (Describe) _____
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/21 ACQUIRED _____/_____/21 DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

- ☐ Stock ☐ Other (Describe) _____
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/21 ACQUIRED _____/_____/21 DISPOSED

Comments: _____

Print

Clear

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 had 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 16, 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.) (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)

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.

- 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 20 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.

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name _____

Comments: _____

FPPC Form 700 - Schedule A-2 (2021/2022)
advice@fppc.ca.gov • 866-275-3772 • www.fppc.ca.gov
Page - 9

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.)

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.

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.)
 - **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,

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?

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.

| | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------|
| ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS 4600 24th Street | |
| CITY Sacramento | |
| FAIR MARKET VALUE | IF APPLICABLE, LIST DATE |
| <input type="checkbox"/> \$2,000 - \$10,000 | ____/____/XX |
| <input type="checkbox"/> \$10,001 - \$100,000 | ACQUIRED |
| <input checked="" type="checkbox"/> \$100,001 - \$1,000,000 | DISPOSED |
| <input type="checkbox"/> Over \$1,000,000 | |
| NATURE OF INTEREST | |
| <input type="checkbox"/> Ownership/Deed of Trust | <input type="checkbox"/> Easement |
| <input type="checkbox"/> Leasehold | <input type="checkbox"/> 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 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 Petroillo | |
| ADDRESS (Business Address Acceptable) | |
| 2121 Blue Sky Parkway, Sacramento | |
| BUSINESS ACTIVITY, IF ANY, OF LENDER | |
| Restaurant Owner | |
| INTEREST RATE | TERM (Months/Years) |
| 8 % <input type="checkbox"/> None | 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)

| |
|---------------------------------------------------------------------------------|
| CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION Name _____ |
|---------------------------------------------------------------------------------|

| ▶ 1. INCOME RECEIVED | ▶ 1. INCOME RECEIVED |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| NAME OF SOURCE OF INCOME _____ ADDRESS (Business Address Acceptable) _____ BUSINESS ACTIVITY, IF ANY, OF SOURCE _____ YOUR BUSINESS POSITION _____ | NAME OF SOURCE OF INCOME _____ ADDRESS (Business Address Acceptable) _____ BUSINESS ACTIVITY, IF ANY, OF SOURCE _____ YOUR BUSINESS POSITION _____ |
| GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000 | GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000 |
| CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.) <input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.) <input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.) <input type="checkbox"/> Loan repayment <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe) <input type="checkbox"/> Other _____ (Describe) | CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.) <input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.) <input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.) <input type="checkbox"/> Loan repayment <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe) <input type="checkbox"/> Other _____ (Describe) |

| ▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>* 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:</p> | |
| NAME OF LENDER* _____ ADDRESS (Business Address Acceptable) _____ BUSINESS ACTIVITY, IF ANY, OF LENDER _____ HIGHEST BALANCE DURING REPORTING PERIOD <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000 | INTEREST RATE _____% <input type="checkbox"/> None SECURITY FOR LOAN <input type="checkbox"/> None <input type="checkbox"/> Personal residence <input type="checkbox"/> Real Property _____ Street address _____ City <input type="checkbox"/> Guarantor _____ <input type="checkbox"/> Other _____ (Describe) |
| Comments: _____ | |

Print

Clear

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.) 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.)
- 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 12.)

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

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

| <div>▶ NAME OF SOURCE (Not an Acronym)</div> <div>ADDRESS (Business Address Acceptable)</div> <div>BUSINESS ACTIVITY, IF ANY, OF SOURCE</div> <table> <tr> <th>DATE (mm/dd/yy)</th> <th>VALUE</th> <th>DESCRIPTION OF GIFT(S)</th> </tr> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> </table> | DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) | ___/___/___ | \$ _____ | _____ | ___/___/___ | \$ _____ | _____ | ___/___/___ | \$ _____ | _____ | <div>▶ NAME OF SOURCE (Not an Acronym)</div> <div>ADDRESS (Business Address Acceptable)</div> <div>BUSINESS ACTIVITY, IF ANY, OF SOURCE</div> <table> <tr> <th>DATE (mm/dd/yy)</th> <th>VALUE</th> <th>DESCRIPTION OF GIFT(S)</th> </tr> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> </table> | DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) | ___/___/___ | \$ _____ | _____ | ___/___/___ | \$ _____ | _____ | ___/___/___ | \$ _____ | _____ |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|------------------------|------------------------|-------------|----------|-------|-------------|----------|-------|-------------|----------|-------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|-------|------------------------|-------------|----------|-------|-------------|----------|-------|-------------|----------|-------|
| DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) | | | | | | | | | | | | | | | | | | | | | | | |
| ___/___/___ | \$ _____ | _____ | | | | | | | | | | | | | | | | | | | | | | | |
| ___/___/___ | \$ _____ | _____ | | | | | | | | | | | | | | | | | | | | | | | |
| ___/___/___ | \$ _____ | _____ | | | | | | | | | | | | | | | | | | | | | | | |
| DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) | | | | | | | | | | | | | | | | | | | | | | | |
| ___/___/___ | \$ _____ | _____ | | | | | | | | | | | | | | | | | | | | | | | |
| ___/___/___ | \$ _____ | _____ | | | | | | | | | | | | | | | | | | | | | | | |
| ___/___/___ | \$ _____ | _____ | | | | | | | | | | | | | | | | | | | | | | | |
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| ___/___/___ | \$ _____ | _____ | | | | | | | | | | | | | | | | | | | | | | | |
| DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) | | | | | | | | | | | | | | | | | | | | | | | |
| ___/___/___ | \$ _____ | _____ | | | | | | | | | | | | | | | | | | | | | | | |
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| ___/___/___ | \$ _____ | _____ | | | | | | | | | | | | | | | | | | | | | | | |

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.)
- Transportation and lodging (See Schedule E.)
- Forgiveness of a loan received by you

Reminders

- Gifts from a single source are subject to a \$520 limit in 2021. (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

| |
|-------------------------------------------------------------------|
| CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION |
| Name _____ |

- 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.

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| ▶ NAME OF SOURCE (Not an Acronym) _____ ADDRESS (Business Address Acceptable) _____ CITY AND STATE _____ <input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE _____ DATE(S): ____/____/____ - ____/____/____ AMT: \$_____ (If gift) ▶ MUST CHECK ONE: <input type="checkbox"/> Gift -or- <input type="checkbox"/> Income <input type="checkbox"/> Made a Speech/Participated in a Panel <input type="checkbox"/> Other - Provide Description _____ _____ ▶ If Gift, Provide Travel Destination _____ _____ |
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| ▶ NAME OF SOURCE (Not an Acronym) _____ ADDRESS (Business Address Acceptable) _____ CITY AND STATE _____ <input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE _____ DATE(S): ____/____/____ - ____/____/____ AMT: \$_____ (If gift) ▶ MUST CHECK ONE: <input type="checkbox"/> Gift -or- <input type="checkbox"/> Income <input type="checkbox"/> Made a Speech/Participated in a Panel <input type="checkbox"/> Other - Provide Description _____ _____ ▶ If Gift, Provide Travel Destination _____ _____ |
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| ▶ NAME OF SOURCE (Not an Acronym) _____ ADDRESS (Business Address Acceptable) _____ CITY AND STATE _____ <input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE _____ DATE(S): ____/____/____ - ____/____/____ AMT: \$_____ (If gift) ▶ MUST CHECK ONE: <input type="checkbox"/> Gift -or- <input type="checkbox"/> Income <input type="checkbox"/> Made a Speech/Participated in a Panel <input type="checkbox"/> Other - Provide Description _____ _____ ▶ If Gift, Provide Travel Destination _____ _____ |
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| ▶ NAME OF SOURCE (Not an Acronym) _____ ADDRESS (Business Address Acceptable) _____ CITY AND STATE _____ <input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE _____ DATE(S): ____/____/____ - ____/____/____ AMT: \$_____ (If gift) ▶ MUST CHECK ONE: <input type="checkbox"/> Gift -or- <input type="checkbox"/> Income <input type="checkbox"/> Made a Speech/Participated in a Panel <input type="checkbox"/> Other - Provide Description _____ _____ ▶ If Gift, Provide Travel Destination _____ _____ |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Comments: _____

Print

Clear

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 nonprofit 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 \$500 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, the **date(s)** received, and 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: \$550.00 |
| (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. | |
| ▶ If Gift, Provide Travel Destination | |

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): | 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 | |

Restrictions and Prohibitions

The Political Reform Act (Gov. Code Sections 81000-91014) requires most state and local government officials and employees to publicly disclose their economic interests including personal assets and income. The Act's conflict of interest provisions also disqualify a public official from taking part in a governmental decision if it is reasonably foreseeable that the decision will have a material financial effect on these economic interests as well as the official's personal finances and those of immediate family. (Gov. Code Sections 87100 and 87103.) The Fair Political Practices Commission (FPPC) is the state agency responsible for issuing the attached Statement of Economic Interests, Form 700, and for interpreting the Act's provisions.

Gift Prohibition

Gifts received by most state and local officials, employees, and candidates are subject to a limit. In 2021-2022, the gift limit increased to \$520 from a single source during a calendar year. In 2019 and 2020, the gift limit was \$500 from a single source during a calendar year.

Additionally, state officials, state candidates, and certain state employees are subject to a \$10 limit per calendar month on gifts from lobbyists and lobbying firms registered with the Secretary of State. See Reference Pamphlet, page 10.

State and local officials and employees should check with their agency to determine if other restrictions apply.

Disqualification

Public officials are, under certain circumstances, required to disqualify themselves from making, participating in, or attempting to influence governmental decisions that will affect their economic interests. This may include interests they are not required to disclose. For example, a personal residence is often not reportable, but may be grounds for disqualification. Specific disqualification requirements apply to 87200 filers (e.g., city councilmembers, members of boards of supervisors, planning commissioners, etc.). These officials must publicly identify the economic interest that creates a conflict of interest and leave the room before a discussion or vote takes place at a public meeting. For more information, consult Government Code Section 87105, Regulation 18707, and the Guide to Recognizing Conflicts of Interest page at www.fppc.ca.gov.

Honorarium Ban

Most state and local officials, employees, and candidates are prohibited from accepting an honorarium for any speech given, article published, or attendance at a conference, convention, meeting, or like gathering. (See Reference Pamphlet, page 10.)

Loan Restrictions

Certain state and local officials are subject to restrictions on loans. (See Reference Pamphlet, page 14.)

Post-Governmental Employment

There are restrictions on representing clients or employers before former agencies. The provisions apply to elected state officials, most state employees, local elected officials, county chief administrative officers, city managers, including the chief administrator of a city, and general managers or chief administrators of local special districts and JPAs. The FPPC website has fact sheets explaining the provisions.

Late Filing

The filing officer who retains originally-signed or electronically filed statements of economic interests may impose on an individual a fine for any statement that is filed late. The fine is \$10 per day up to a maximum of \$100. Late filing penalties may be reduced or waived under certain circumstances.

Persons who fail to timely file their Form 700 may be referred to the FPPC's Enforcement Division (and, in some cases, to the Attorney General or district attorney) for investigation and possible prosecution. In addition to the late filing penalties, a fine of up to \$5,000 per violation may be imposed.

For assistance concerning reporting, prohibitions, and restrictions under the Act:

- Email questions to advice@fppc.ca.gov.
- Call the FPPC toll-free at (866) 275-3772.

Form 700 is a Public Document Public Access Must Be Provided

Statements of Economic Interests are public documents. The filing officer must permit any member of the public to inspect and receive a copy of any statement.

- Statements must be available as soon as possible during the agency's regular business hours, but in any event not later than the second business day after the statement is received. Access to the Form 700 is not subject to the Public Records Act procedures.
- No conditions may be placed on persons seeking access to the forms.
- No information or identification may be required from persons seeking access.
- Reproduction fees of no more than 10 cents per page may be charged.

Questions and Answers

General

- Q. What is the reporting period for disclosing interests on an assuming office statement or a candidate statement?
- A. On an assuming office statement, disclose all reportable investments, interests in real property, and business positions held on the date you assumed office. In addition, you must disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you assumed office.

On a candidate statement, disclose all reportable investments, interests in real property, and business positions held on the date you file your declaration of candidacy. You must also disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you file your declaration of candidacy.

- Q. I hold two other board positions in addition to my position with the county. Must I file three statements of economic interests?
- A. Yes, three are required. However, you may instead complete an expanded statement listing the county and the two boards on the Cover Page or an attachment as the agencies for which you will be filing. Disclose all reportable economic interests in all three jurisdictions on the expanded statement. File the expanded statement for your primary position providing an original "wet" signature unless filed with a secure electronic signature. (See page 3 above.) File copies of the expanded statement with the other two agencies as required by Regulation 18723.1(c). Remember to complete separate statements for positions that you leave or assume during the year.
- Q. I am a department head who recently began acting as city manager. Should I file as the city manager?
- A. Yes. File an assuming office statement as city manager. Persons serving as "acting," "interim," or "alternate" must file as if they hold the position because they are or may be performing the duties of the position.

- Q. My spouse and I are currently separated and in the process of obtaining a divorce. Must I still report my spouse's income, investments, and interests in real property?
- A. Yes. A public official must continue to report a spouse's economic interests until such time as dissolution of marriage proceedings is final. However, if a separate property agreement has been reached prior to that time, your estranged spouse's income may not have to be reported. Contact the FPPC for more information.
- Q. As a designated employee, I left one state agency to work for another state agency. Must I file a leaving office statement?
- A. Yes. You may also need to file an assuming office statement for the new agency.

Investment Disclosure

- Q. I have an investment interest in shares of stock in a company that does not have an office in my jurisdiction. Must I still disclose my investment interest in this company?
- A. Probably. The definition of "doing business in the jurisdiction" is not limited to whether the business has an office or physical location in your jurisdiction. (See Reference Pamphlet, page 13.)
- Q. My spouse and I have a living trust. The trust holds rental property in my jurisdiction, our primary residence, and investments in diversified mutual funds. I have full disclosure. How is this trust disclosed?
- A. Disclose the name of the trust, the rental property and its income on Schedule A-2. Your primary residence and investments in diversified mutual funds registered with the SEC are not reportable.
- Q. I am required to report all investments. I have an IRA that contains stocks through an account managed by a brokerage firm. Must I disclose these stocks even though they are held in an IRA and I did not decide which stocks to purchase?
- A. Yes. Disclose on Schedule A-1 or A-2 any stock worth \$2,000 or more in a business entity located in or doing business in your jurisdiction.

Questions and Answers Continued

- Q. The value of my stock changed during the reporting period. How do I report the value of the stock?
- A. You are required to report the highest value that the stock reached during the reporting period. You may use your monthly statements to determine the highest value. You may also use the entity's website to determine the highest value. You are encouraged to keep a record of where you found the reported value. Note that for an assuming office statement, you must report the value of the stock on the date you assumed office.
- Q. I am the sole owner of my business, an S-Corporation. I believe that the nature of the business is such that it cannot be said to have any "fair market value" because it has no assets. I operate the corporation under an agreement with a large insurance company. My contract does not have resale value because of its nature as a personal services contract. Must I report the fair market value for my business on Schedule A-2 of the Form 700?
- A. Yes. Even if there are no *tangible* assets, intangible assets, such as relationships with companies and clients are commonly sold to qualified professionals. The "fair market value" is often quantified for other purposes, such as marital dissolutions or estate planning. In addition, the IRS presumes that "personal services corporations" have a fair market value. A professional "book of business" and the associated goodwill that generates income are not without a determinable value. The Form 700 does not require a precise fair market value; it is only necessary to check a box indicating the broad range within which the value falls.
- Q. I own stock in IBM and must report this investment on Schedule A-1. I initially purchased this stock in the early 1990s; however, I am constantly buying and selling shares. Must I note these dates in the "Acquired" and "Disposed" fields?
- A. No. You must only report dates in the "Acquired" or "Disposed" fields when, during the reporting period, you initially purchase a reportable investment worth \$2,000 or more or when you dispose of the entire investment. You are not required to track the partial trading of an investment.
- Q. On last year's filing I reported stock in Encoe valued at \$2,000 - \$10,000. Late last year the value of this stock fell below and remains at less than \$2,000. How should this be reported on this year's statement?
- A. You are not required to report an investment if the value was less than \$2,000 during the **entire** reporting period. However, because a disposed date is not required for stocks that fall below \$2,000, you may want to report the stock and note in the "comments" section that the value fell below \$2,000. This would be for informational purposes only; it is not a requirement.
- Q. We have a Section 529 account set up to save money for our son's college education. Is this reportable?
- A. If the Section 529 account contains reportable interests (e.g., common stock valued at \$2,000 or more), those interests are reportable (not the actual Section 529 account). If the account contains solely mutual funds, then nothing is reported.

Income Disclosure

- Q. I reported a business entity on Schedule A-2. Clients of my business are located in several states. Must I report all clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2, Part 3?
- A. No, only the clients located in or doing business on a regular basis in your jurisdiction must be disclosed.
- Q. I believe I am not required to disclose the names of clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2 because of their right to privacy. Is there an exception for reporting clients' names?
- A. Regulation 18740 provides a procedure for requesting an exemption to allow a client's name not to be disclosed if disclosure of the name would violate a legally recognized privilege under California or Federal law. This regulation may be obtained from our website at www.fppc.ca.gov. (See Reference Pamphlet, page 14.)

Questions and Answers Continued

- Q. I am sole owner of a private law practice that is not reportable based on my limited disclosure category. However, some of the sources of income to my law practice are from reportable sources. Do I have to disclose this income?
- A. Yes, even though the law practice is not reportable, reportable sources of income to the law practice of \$10,000 or more must be disclosed. This information would be disclosed on Schedule C with a note in the "comments" section indicating that the business entity is not a reportable investment. The note would be for informational purposes only; it is not a requirement.
- Q. I am the sole owner of my business. Where do I disclose my income - on Schedule A-2 or Schedule C?
- A. Sources of income to a business in which you have an ownership interest of 10% or greater are disclosed on Schedule A-2. (See Reference Pamphlet, page 8.)
- Q. My husband is a partner in a four-person firm where all of his business is based on his own billings and collections from various clients. How do I report my community property interest in this business and the income generated in this manner?
- A. If your husband's investment in the firm is 10% or greater, disclose 100% of his share of the business on Schedule A-2, Part 1 and 50% of his income on Schedule A-2, Parts 2 and 3. For example, a client of your husband's must be a source of at least \$20,000 during the reporting period before the client's name is reported.
- Q. How do I disclose my spouse's or registered domestic partner's salary?
- A. Report the name of the employer as a source of income on Schedule C.
- Q. I am a doctor. For purposes of reporting \$10,000 sources of income on Schedule A-2, Part 3, are the patients or their insurance carriers considered sources of income?
- A. If your patients exercise sufficient control by selecting you instead of other doctors, then your patients, rather than their insurance carriers, are sources of income to you. (See Reference Pamphlet, page 14.)
- Q. I received a loan from my grandfather to purchase my home. Is this loan reportable?
- A. No. Loans received from family members are not reportable.
- Q. Many years ago, I loaned my parents several thousand dollars, which they paid back this year. Do I need to report this loan repayment on my Form 700?
- A. No. Payments received on a loan made to a family member are not reportable.

Real Property Disclosure

- Q. During this reporting period we switched our principal place of residence into a rental. I have full disclosure and the property is located in my agency's jurisdiction, so it is now reportable. Because I have not reported this property before, do I need to show an "acquired" date?
- A. No, you are not required to show an "acquired" date because you previously owned the property. However, you may want to note in the "comments" section that the property was not previously reported because it was used exclusively as your residence. This would be for informational purposes only; it is not a requirement.
- Q. I am a city manager, and I own a rental property located in an adjacent city, but one mile from the city limit. Do I need to report this property interest?
- A. Yes. You are required to report this property because it is located within 2 miles of the boundaries of the city you manage.
- Q. Must I report a home that I own as a personal residence for my daughter?
- A. You are not required to disclose a home used as a personal residence for a family member unless you receive income from it, such as rental income.
- Q. I am a co-signer on a loan for a rental property owned by a friend. Since I am listed on the deed of trust, do I need to report my friend's property as an interest in real property on my Form 700?
- A. No. Simply being a co-signer on a loan for property does not create a reportable interest in that real property.

Questions and Answers

Continued

Gift Disclosure

- Q. If I received a reportable gift of two tickets to a concert valued at \$100 each, but gave the tickets to a friend because I could not attend the concert, do I have any reporting obligations?
- A. Yes. Since you accepted the gift and exercised discretion and control of the use of the tickets, you must disclose the gift on Schedule D.
- Q. Julia and Jared Benson, a married couple, want to give a piece of artwork to a county supervisor. Is each spouse considered a separate source for purposes of the gift limit and disclosure?
- A. Yes, each spouse may make a gift valued at the gift limit during a calendar year. For example, during 2021 the gift limit was \$520, so the Bensons may have given the supervisor artwork valued at no more than \$1,040. The supervisor must identify Jared and Julia Benson as the sources of the gift.
- Q. I am a Form 700 filer with full disclosure. Our agency holds a holiday raffle to raise funds for a local charity. I bought \$10 worth of raffle tickets and won a gift basket valued at \$120. The gift basket was donated by Doug Brewer, a citizen in our city. At the same event, I bought raffle tickets for, and won a quilt valued at \$70. The quilt was donated by a coworker. Are these reportable gifts?
- A. Because the gift basket was donated by an outside source (not an agency employee), you have received a reportable gift valued at \$110 (the value of the basket less the consideration paid). The source of the gift is Doug Brewer and the agency is disclosed as the intermediary. Because the quilt was donated by an employee of your agency, it is not a reportable gift.
- Q. My agency is responsible for disbursing grants. An applicant (501(c)(3) organization) met with agency employees to present its application. At this meeting, the applicant provided food and beverages. Would the food and beverages be considered gifts to the employees? These employees are designated in our agency's conflict of interest code and the applicant is a reportable source of income under the code.
- A. Yes. If the value of the food and beverages consumed by any one filer, plus any other gifts received from the same source during the reporting period total \$50 or more, the food and beverages would be reported using the fair market value and would be subject to the gift limit.
- Q. I received free admission to an educational conference related to my official duties. Part of the conference fees included a round of golf. Is the value of the golf considered informational material?
- A. No. The value of personal benefits, such as golf, attendance at a concert, or sporting event, are gifts subject to reporting and limits.

**2021/2022
Form 700
Statement of
Economic Interests**



**Reference
Pamphlet**

California Fair Political Practices Commission

1102 Q Street, Suite 3000 • Sacramento, CA 95811

Email advice: advice@fppc.ca.gov

Toll-free advice line: 1 (866) ASK-FPPC • (866) 275-3772

Telephone: (916) 322-5660 • Website: www.fppc.ca.gov

Who Must File

1. Officials and Candidates Specified in Gov. Code Section 87200 and Members of Boards and Commissions of Newly Created Agencies

The Act requires the following individuals to fully disclose their personal assets and income described in Form 700, Statement of Economic Interests:

State Offices

- Governor
- Lieutenant Governor
- Attorney General
- Controller
- Insurance Commissioner
- Secretary of State
- Treasurer
- Members of the State Legislature
- Superintendent of Public Instruction
- State Board of Equalization Members
- Public Utilities Commissioners
- State Energy Resources Conservation and Development Commissioners
- State Coastal Commissioners
- Fair Political Practices Commissioners
- State public officials (including employees and consultants) who manage public investments
- Elected members of and candidates for the Board of Administration of the California Public Employees' Retirement System
- Elected members of and candidates for the Teachers' Retirement Board
- Members of the High Speed Rail Authority

Other officials and employees of state boards, commissions, agencies, and departments file Form 700 as described in Part 2 on this page.

Judicial Offices

- Supreme, Appellate, and Superior Court Judges
- Court Commissioners
- Retired Judges, Pro-Tem Judges, and part-time Court Commissioners who serve or expect to serve 30 days or more in a calendar year

County and City Offices

- Members of Boards of Supervisors
- Mayors and Members of City Councils
- Chief Administrative Officers
- District Attorneys
- County Counsels
- City Attorneys
- City Managers
- Planning Commissioners
- County and City Treasurers
- County and city public officials (including employees and consultants) who manage public investments

Members of Newly Created Boards and Commissions

Generally, such a member must file an assuming office statement within 30 days as well as subsequent statements until the member's position is designated in a conflict of interest code. See Regulation 18754.

2. State and Local Officials, Employees, Candidates, and Consultants Designated in a Conflict of Interest Code ("Code Filers")

The Act requires every state and local government agency to adopt a unique conflict of interest code. The code lists each position within the agency filled by individuals who make or participate in making governmental decisions that could affect their personal economic interests.

The code requires individuals holding those positions to periodically file Form 700 disclosing certain personal economic interests as determined by the code's "disclosure categories." These individuals are called "designated employees" or "code filers."

Obtain your disclosure categories from your agency – they are not contained in the Form 700. Persons with broad decisionmaking authority must disclose more interests than those in positions with limited discretion. For example, you may be required to disclose only investments and business positions in or income (including loans, gifts, and travel payments) from businesses of the type that contract with your agency, or you may not be required to disclose real property interests.

In addition, certain consultants to public agencies may qualify as public officials because they make, participate in making, or act in a staff capacity for governmental decisions. Agencies determine who is a consultant and the level of disclosure and may use Form 805.

Note: An official who holds a position specified in Gov. Code Section 87200 is not required to file statements under the conflict of interest code of any agency that has the same or a smaller jurisdiction (for example, a state legislator who also sits on a state or local board or commission).

Employees in Newly Created Positions of Existing Agencies

An individual hired for a position not yet covered under an agency's conflict of interest code must file Form 700 if the individual serves in a position that makes or participates in making governmental decisions. These individuals must file under the agency's broadest disclosure category until the code is amended to include the new position unless the agency has provided in writing a limited disclosure requirement. The Form 804 may be used to satisfy this requirement.

Where to File

1. Officials Specified in Gov. Code Section 87200 (See Reference Pamphlet, page 3):

In most cases, the filing officials listed below will retain a copy of your statement and forward the original to the FPPC.

| Filers | Where to File |
|-----------------------------------------------|----------------------------------------------------------------------------|
| 87200 Filers | |
| State offices | Your agency |
| Judicial offices | The clerk of your court |
| Retired Judges | Directly with FPPC |
| County offices | Your county filing official |
| City offices | Your city clerk |
| Multi-County offices | Your agency |
| 87200 Candidates | |
| State offices | County elections official with whom you file your declaration of candidacy |
| Judicial offices | |
| Multi-County offices | |
| County offices | County elections official |
| City offices | City Clerk |
| Public Employees' Retirement System (CalPERS) | CalPERS |
| State Teachers' Retirement Board (CalSTRS) | CalSTRS |

Note: Individuals that invest public funds for a city or county agency must file Form 700 with the agency. Unlike most other 87200 filers, the original statement will **not** be forwarded to the FPPC pursuant to Regulation 18753.

2. Code Filers — State and Local Officials, Employees, Candidates, and Consultants Designated in a Conflict of Interest Code:

File with your agency, board, or commission unless otherwise specified in your agency's conflict of interest code. In most cases, the agency, board, or commission will retain the statements.

Candidates for local elective offices designated in a conflict of interest code file with the elections office where the declaration of candidacy or other nomination documents are filed.

3. Members of Newly Created Boards and Commissions:

File with your agency or with your agency's code reviewing body. See Regulation 18754.

State Senate and Assembly staff members file statements directly with the FPPC.

Exceptions:

- Elected state officers are not required to file statements under any agency's conflict of interest code.
- Filers listed in Section 87200 are not required to file statements under any agency's conflict of interest code in the same jurisdiction. For example, a county supervisor who is appointed to serve in an agency with jurisdiction in the same county has no additional filing obligations.

4. Positions Not Yet Covered Under a Conflict of Interest Code

An individual hired for a position not yet covered under an agency's conflict of interest code must file Form 700 if the individual serves in a position that makes or participates in making governmental decisions. These individuals must file under the broadest disclosure category until the code is amended to include the new position unless the agency has provided in writing a limited disclosure requirement. Agencies may use FPPC Form 804 for this disclosure. Such individuals are referred to as "code filers." See Regulation 18734.

When to File - (continued)

Leaving Office Statements:

Leaving office statements must be filed no later than 30 days after leaving the office or position.

Exceptions:

- If you complete a term of office and, within 30 days, begin a new term of the same office (for example, you are reelected or reappointed), you are not required to file a leaving office statement. Instead, you will simply file the next annual statement due.
- If you leave an office specified in Gov. Code Section 87200 and, within 45 days, you assume another office or position specified in Section 87200 that has the same jurisdiction (for example, a city planning commissioner elected as mayor), you are not required to file a leaving office statement. Instead, you will simply file the next annual statement due.
- If you transfer from one designated position to another designated position within the same agency, contact your filing officer or the FPPC to determine your filing obligations.

Candidate Statements:

All candidates (including incumbents) for offices specified in Gov. Code Section 87200 must file statements no later than the final filing date for their declaration of candidacy.

Candidates seeking a position designated in a conflict of interest code must file no later than the final filing date for the declaration of candidacy or other nomination documents.

Exception:

A candidate statement is not required if you filed an assuming office or annual statement for the same jurisdiction **within 60 days** before filing a declaration of candidacy or other nomination documents.

Late Statements:

Late statements should be submitted as soon as possible after the filing deadline, in the same manner and place as a timely filed statement.

The filing officer who retains originally-signed or electronically filed statements of economic interests may impose on an individual a fine for any statement that is filed late. The fine is \$10 per day up to a maximum of \$100. Late filing penalties may be reduced or waived under certain circumstances.

Persons who fail to timely file their Form 700 may be referred to the FPPC's Enforcement Division (and, in some cases, to the Attorney General or District Attorney) for investigation and possible prosecution. In addition to the late filing penalties from the filing officer, a fine of up to \$5,000 per violation may be imposed.

Terms & Definitions - (continued)

Conflict of Interest: A public official or employee has a conflict of interest under the Act when all of the following occur:

- The official makes, participates in making, or uses their official position to influence a governmental decision;
- It is reasonably foreseeable that the decision will affect the official's economic interest;
- The effect of the decision on the official's economic interest will be material; and
- The effect of the decision on the official's economic interest will be different than its effect on the public generally.

Conflict of Interest Code: The Act requires every state and local government agency to adopt a conflict of interest code. The code may be contained in a regulation, policy statement, or a city or county ordinance, resolution, or other document.

An agency's conflict of interest code must designate all officials and employees of, and consultants to, the agency who make or participate in making governmental decisions that could cause conflicts of interest. These individuals are required by the code to file statements of economic interests and to disqualify themselves when conflicts of interest occur.

The disclosure required under a conflict of interest code for a particular designated official or employee should include only the kinds of personal economic interests they could significantly affect through the exercise of their official duties. For example, an employee whose duties are limited to reviewing contracts for supplies, equipment, materials, or services provided to the agency should be required to report only those interests they hold that are likely to be affected by the agency's contracts for supplies, equipment, materials, or services.

Consultant: An individual who contracts with or whose employer contracts with state or local government agencies and who makes, participates in making, or acts in a staff capacity for making governmental decisions. The agency determines who is a consultant. Consultants may be required to file Form 700. Such consultants would file under full disclosure unless the agency provides in writing a limited disclosure requirement. Agencies may use FPPC Form 805 to assign such disclosure. The obligation to file Form 700 is always imposed on the individual who is providing services to the agency, not on the business or firm that employs the individual.

FPPC Regulation 18700.3 defines "consultant" as an individual who makes a governmental decision whether to:

- Approve a rate, rule, or regulation
- Adopt or enforce a law
- Issue, deny, suspend, or revoke any permit, license, application, certificate, approval, order, or similar authorization or entitlement
- Authorize the agency to enter into, modify, or renew a contract provided it is the type of contract that requires agency approval
- Grant agency approval to a contract that requires agency approval and to which the agency is a party, or to the specifications for such a contract
- Grant agency approval to a plan, design, report, study, or similar item
- Adopt, or grant agency approval of, policies, standards, or guidelines for the agency or for any of its subdivisions

A consultant also is an individual who serves in a staff capacity with the agency and:

- participates in making a governmental decision; or
- performs the same or substantially all the same duties for the agency that would otherwise be performed by an individual holding a position specified in the agency's conflict of interest code.

Designated Employee: An official or employee of a state or local government agency whose position has been designated in the agency's conflict of interest code to file statements of economic interests or whose position has not yet been listed in the code but makes or participates in making governmental decisions. Individuals who contract with government agencies (consultants) may also be designated in a conflict of interest code.

A federal officer or employee serving in an official federal capacity on a state or local government agency is not a designated employee.

Disclosure Categories: The section of an agency's conflict of interest code that specifies the types of personal economic interests officials and employees of the agency must disclose on their statements of economic interests. Disclosure categories are usually contained in an appendix or attachment to the conflict of interest code. Contact your agency to obtain a copy of your disclosure categories.

Terms & Definitions - (continued)

Honoraria:

State and local officials who are listed in Gov. Code Section 87200 (except judges – see below), candidates for these elective offices (including judicial candidates), and employees of state and local government agencies who are designated in a conflict of interest code are prohibited from accepting honoraria for any speech given, article published, or attendance at any public or private conference, convention, meeting, social event, meal, or like gathering.

Exceptions:

- Some gifts are not reportable or subject to the gift and honoraria prohibitions, and other gifts may not be subject to the prohibitions, but are reportable. For detailed information, see the FPPC fact sheet entitled “Limitations and Restrictions on Gifts, Honoraria, Travel, and Loans,” which can be obtained from your filing officer or the FPPC website (www.fppc.ca.gov).
- The gift limit and the honorarium prohibitions do not apply to a part-time member of the governing board of a public institution of higher education, unless the member is also an elected official.
- If you are designated in a state or local government agency’s conflict of interest code, the gift limit and honorarium prohibition are applicable only to sources you would otherwise be required to report on your statement of economic interests. However, this exception is not applicable if you also hold a position listed in Gov. Code Section 87200 (See Reference Pamphlet, page 3.)
- For state agency officials and employees, the \$10 lobbyist/lobbying firm gift limit is applicable only to lobbyists and lobbying firms registered to lobby your agency. This exception is not applicable if you are an elected state officer or a member or employee of the State Legislature.
- Payments for articles published as part of the practice of a bona fide business, trade, or profession, such as teaching, are not considered honoraria. A payment for an “article published” that is customarily provided in connection with teaching includes text book royalties and payments for academic tenure review letters. An official is presumed to be engaged in the bona fide profession of teaching if they are employed to teach at an accredited university.

Judges:

Section 170.9 of the Code of Civil Procedure imposes gift limits on judges and prohibits judges from accepting any honorarium. Section 170.9 is enforced by the Commission on Judicial Performance. The FPPC has no authority to interpret or enforce the Code of Civil Procedure. Court commissioners are subject to the gift limit under the Political Reform Act.

Income Reporting: Reporting income under the Act is different than reporting income for tax purposes. The Act requires **gross** income (the amount received before deducting losses, expenses, or taxes, as well as income reinvested in a business entity) to be reported.

Pro Rata Share: The instructions for reporting income refer to your pro rata share of the income received. Your pro rata share is normally based on your ownership interest in the entity or property. For example, if you are a sole proprietor, you must disclose 100% of the gross income to the business entity on Schedule A-2. If you own 25% of a piece of rental property, you must report 25% of the gross rental income received. When reporting your community property interest in your spouse’s or registered domestic partner’s income, your pro rata share is 50% of their income.

Separate Property Agreement: Generally, a public official is required to disclose their community property share of their spouse’s income. But, when a public official and their spouse have a legally separate property agreement (e.g., prenuptial agreement), the official is not required to report the spouse’s community property share of income, unless the funds are commingled with community funds or used to pay for community expenses or to produce or enhance the separate income of the official.

Note: This reporting exception does not apply to investments and interests in real property. Even if a public official and their spouse have a separate property agreement, the spouse’s investments and interests in real property must still be disclosed because the definitions of reportable investments and interests in real property include those held by the official’s immediate family (spouse, registered domestic partner, and dependent children). These definitions are not dependent on community property law.

Income to a Business Entity: When you are required to report sources of income to a business entity, sources of rental income, or sources of commission income, you are only required to disclose individual sources of income of \$10,000 or more. However, you may be required to **disqualify** yourself from decisions affecting sources of \$500 or more in income, even though you are not required to report them.

Examples:

- Alice Ruiz is a partner in a business entity. She has a 25% interest. On Schedule A-2, she must disclose 25% of the fair market value of the business entity; 25% of the gross income to the business entity (even though all of the income received was reinvested in the business and she did not personally receive any income from the business); and the name of each source of \$40,000 or more to the business.

Terms & Definitions - (continued)

Report incentive compensation as follows:

- In addition to salary, reimbursement of expenses, and other income received from your employer, separately report on Schedule C the name of each person who purchased products or services sold, marketed or represented by you if you received incentive compensation of \$500 or more attributable to the purchaser during the period covered by the statement.
- If incentive compensation is paid by your employer in a lump sum, without allocation of amounts to specific customers, you must determine the amount of incentive compensation attributable to each of your customers. This may be based on the volume of sales to those customers.

(See Regulations 18700.1 and 18728.5 for more information.)

Investment Funds: The term "investment" no longer includes certain exchange traded funds, closed-end funds, or funds held in an Internal Revenue Code qualified plan. These non-reportable investment funds (1) must be bona fide investment funds that pool money from more than 100 investors, (2) must hold securities of more than 15 issuers, and (3) cannot have a stated policy of concentrating their holdings in the same industry or business ("sector funds"). In addition, the filer may not influence or control the decision to purchase or sell the specific fund on behalf of their agency during the reporting period or influence or control the selection of any specific investment purchased or sold by the fund. (Regulation 18237)

Investments and Interests in Real Property: When disclosing investments on Schedules A-1 or A-2 and interests in real property on Schedules A-2 or B, you must include investments and interests in real property held by your spouse or registered domestic partner, and those held by your dependent children, as if you held them directly.

Examples:

- Julia Pearson, husband, and two dependent children each own \$600 in stock in General Motors. Because the total value of their holdings is \$2,400, Julia must disclose the stock as an investment on Schedule A-1.
- Pat and Mark Johnson, a married couple, jointly own Classic Autos. Mark must disclose Classic Autos as an investment on Schedule A-2. To determine the reportable value of the investment, Mark will aggregate the value of his 50% interest and Pat's 50% interest. Thus, if the total value of the business entity is \$150,000, he will check the box \$100,001 - \$1,000,000 in Part 1 of Schedule A-2. (Also see Reference Pamphlet, page 11, for an example of how to calculate reportable income.)

The Johnsons also own the property where Classic Autos is located. To determine the reportable value of the real property, Mark will again aggregate the value of his 50% interest and Pat's 50% interest to determine the amount to report in Part 4 of Schedule A-2.

- Katie Lee rents out a room in her home. She receives \$6,000 a year in rental income. Katie will report the fair market value of the rental portion of her residence and the income received on Schedule B.

Jurisdiction: Report disclosable investments and sources of income (including loans, gifts, and travel payments) that are either located in or doing business in your agency's jurisdiction, are planning to do business in your agency's jurisdiction, or have done business during the previous two years in your agency's jurisdiction, and interests in real property located in your agency's jurisdiction.

A business entity is doing business in your agency's jurisdiction if the entity has business contacts on a regular or substantial basis with a person who maintains a physical presence in your jurisdiction.

Business contacts include, but are not limited to, manufacturing, distributing, selling, purchasing, or providing services or goods. Business contacts do not include marketing via the Internet, telephone, television, radio, or printed media.

The same criteria are used to determine whether an individual, organization, or other entity is doing business in your jurisdiction.

Exception:

Gifts are reportable regardless of the location of the donor. For example, a state agency official with full disclosure must report gifts from sources located outside of California. (Designated employees/code filers should consult their disclosure categories to determine if the donor of a gift is of the type that must be disclosed.)

When reporting interests in real property, if your jurisdiction is the state, you must disclose real property located within the state of California unless your agency's conflict of interest code specifies otherwise.

For local agencies, an interest in real property is located in your jurisdiction if any part of the property is located in, or within two miles of, the region, city, county, district, or other geographical area in which the agency has jurisdiction, or if the property is located within two miles of any land owned or used by the agency.

Terms & Definitions - (continued)

This explanation may be included with, or attached to, the public official's Form 700.

We note that the name of a source of income is privileged only to a limited extent under California law. For example, a name is protected by attorney-client privilege only when facts concerning an attorney's representation of an anonymous client are not publicly known and those facts,

when coupled with disclosure of the client's identity, might expose the client to an official investigation or to civil or criminal liability. A patient's name is protected by physician-patient privilege only when disclosure of the patient's name would also reveal the nature of the treatment received by the patient. A patient's name is also protected if the disclosure of the patient's name would constitute a violation by an entity covered under the Federal Health Insurance Portability and Accountability Act (also known as HIPAA).

Public Officials Who Manage Public Investments:

Individuals who invest public funds in revenue-producing programs must file Form 700. This includes individuals who direct or approve investment transactions, formulate or approve investment policies, and establish guidelines for asset allocations. FPPC Regulation 18700.3 defines "public officials who manage public investments" to include the following:

- Members of boards and commissions, including pension and retirement boards or commissions, and committees thereof, who exercise responsibility for the management of public investments;
- High-level officers and employees of public agencies who exercise primary responsibility for the management of public investments (for example, chief or principal investment officers or chief financial managers); and
- Individuals who, pursuant to a contract with a state or local government agency, perform the same or substantially all the same functions described above.

Registered Domestic Partners: Filers must report investments and interests in real property held by, and sources of income to, registered domestic partners. (See Regulation 18229.)

Retirement Accounts (for example, deferred compensation and individual retirement accounts (IRAs)): Assets held in retirement accounts must be disclosed if the assets are reportable items, such as common stock (investments) or real estate (interests in real property). For help in determining whether your investments and real property are reportable, see the instructions to Schedules A-1, A-2, and B.

If your retirement account holds reportable assets, disclose only the assets held in the account, not the account

itself. You may have to contact your account manager to determine the assets contained in your account.

Schedule A-1: Report any business entity in which the value of your investment interest was \$2,000 or more during the reporting period. (Use Schedule A-2 if you have a 10% or greater ownership interest in the business entity.)

Schedule B: Report any piece of real property in which the value of your interest was \$2,000 or more during the reporting period.

Examples:

- Anaya Tiwari deposits \$500 per month into her employer's deferred compensation program. She has chosen to purchase shares in two diversified mutual funds registered with the Securities and Exchange Commission. Because her funds are invested solely in non-reportable mutual funds (see Schedule A-1 instructions), Anaya has no disclosure requirements with regard to the deferred compensation program.
- Earl James Jones has \$6,000 in an individual retirement account with an investment firm. The account contains stock in several companies doing business in his jurisdiction. One of his stock holdings, Misac Computers, reached a value of \$2,500 during the reporting period. The value of his investment in each of the other companies was less than \$2,000. Earl must report Misac Computers as an investment on Schedule A-1 because the value of his stock in that company was \$2,000 or more.
- Adriane Fisher has \$5,000 in a retirement fund that invests in real property located in her jurisdiction. The value of her interest in each piece of real property held in the fund was less than \$2,000 during the reporting period. Although her retirement fund holds reportable assets, she has no disclosure requirement because she did not have a \$2,000 or greater interest in any single piece of real property. If, in the future, the value of her interest in a single piece of real property reaches or

Teachers and Staff Contact

[District Letterhead]

_____, 2022

Dear Colleagues,

We share in your commitment to providing the best possible education to the students of the Ducor Union Elementary School District (District). Many of you have already heard that the District is planning for a school improvement measure. We want to explain to you why the District is considering an election and what it will mean to all of us as employees of the District.

The District has provided a quality education for the children of our community for nearly 115 years. However, just as it is important for a student to have books to learn, and quality teaching, student must also have adequate facilities to succeed. It is now time to provide current and future generations of our children with the classrooms, school facilities, and technology that they deserve.

The District wants to improve school facilities and provide safe and updated classrooms to meet 21st Century standards, make safety and security upgrades by improving fencing and fire sprinkler systems, refurbish the school/community multipurpose room and kitchen, and to fix outdated restroom and student support facilities. The District does not have the funding for these projects and the Board of Trustees may consider calling for an election to fund these needed improvements.

Unlike those of you who deal daily with the problems our schools face, many in the community are simply unaware of these needs. We are currently involved in a citizen information campaign to make sure that our community knows the facts about our schools. In the end, many of our voters will make up their minds only after talking to you. Teachers and staff are the most knowledgeable and credible representatives of our District. This is why it is so important that you understand the facts surrounding our District's needs as well as the proposed bond.

Attached is a "Fact Sheet" with answers to the most frequently asked questions. Please take a moment to review this information. Feel free to call one of us if you have any questions. We need your active participation in this effort through the next few months to communicate our many needs to our parents and community.

We look forward to continuing to work on this issue with all of you.

Sincerely,

Isidro Rodriguez
Superintendent

Steve McCurry
CTA Representative

Lisa Lucio
President, CSEA

[District Letterhead]
Sample Parent Letter

_____, 2022

Dear Mr./Mrs./Ms. (Parent):

We share in your commitment to provide the best possible educational program for your student(s). Teachers and staff are committed to ensuring each student receives a quality education. However, in addition to a strong curriculum and hard work, the physical condition of the school plays a big role in your child's continued academic success.

The Ducor Union Elementary School District has provided a quality education for the children of our community for over 115 years. However, our school is old and needs to be fixed. The District may consider a future election to improve school facilities that will provide safe and updated classrooms to meet 21st Century standards, make safety and security upgrades by improving fencing and fire sprinkler systems, refurbish the school/community multipurpose room and kitchen, and to fix outdated restroom and student support facilities.

If the District's Board of Trustees call for an election, to fund needed improvements, it may take place in June 2022. All registered voters of the Ducor Union Elementary School District will be eligible to vote on the school improvement measure.

Attached is a "Fact Sheet" with answers to many of the most frequently asked questions. Please take a moment to review this information. We believe the needed funds will help meet the school facility needs of our students.

It is our goal to periodically inform you of our efforts and progress. In the interim, should you have any questions or comments, please feel free to me directly at (559) xxx-xxxx.

Sincerely,

Isidro Rodriguez
Superintendent

**DUCOR UNION ELEMENTARY SCHOOL DISTRICT
BOARD EVALUATION OF SUPERINTENDENT (2020-21)**

APPRAISAL SCALE

The Board has used the following numerical scale to appraise the Superintendent's performance:

- 1. Marginal:** Performance is clearly below acceptable level. (Does not meet district standards)
- 2. Fair:** Performance comes close to being acceptable but further improvement is needed. (Needs improvement).
- 3. Competent:** Performance is capable or worthy of being accepted, satisfactory, sufficient.
- 4. Commendable:** Performance is noticeably better than "acceptable". (Exceeds district standards).
- 5. Distinguished:** Outstanding performance is clearly obvious to all. (A special category to recognize exemplary district performance).

EDUCATIONAL LEADERSHIP

| CURRICULUM DEVELOPMENT | 1 | 2 | 3 | 4 | 5 |
|---------------------------------------------------------------------------------|---|---|---|---|---|
| 1. Coordinates curriculum development within the district. | | | | | |
| 2. Provides leadership in reviewing and developing curriculum. | | | | | |
| 3. Utilizes the talents of professionals and community members. | | | | | |
| 4. Establishes curriculum needs of special students. | | | | | |
| 5. Makes recommendations for textbooks for school board adoption. | | | | | |
| 6. Maintains a current knowledge of developments in curriculum and instruction. | | | | | |
| 7. Implements the district's philosophy of education. | | | | | |
| Strengths | | | | | |
| | | | | | |
| Areas to Refine | | | | | |
| | | | | | |

DUCOR UNION ELEMENTARY SCHOOL DISTRICT BOARD EVALUATION OF SUPERINTENDENT (2021-22)

APPRAISAL SCALE

The Board has used the following numerical scale to appraise the Superintendent's performance:

- 1. Marginal:** Performance is clearly below acceptable level. (Does not meet district standards)
- 2. Fair:** Performance comes close to being acceptable but further improvement is needed. (Needs improvement).
- 3. Competent:** Performance is capable or worthy of being accepted, satisfactory, sufficient.
- 4. Commendable:** Performance is noticeably better than "acceptable". (Exceeds district standards).
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EDUCATIONAL LEADERSHIP

| CURRICULUM DEVELOPMENT | 1 | 2 | 3 | 4 | 5 |
|---------------------------------------------------------------------------------|---|---|---|---|---|
| 1. Coordinates curriculum development within the district. | | | | | |
| 2. Provides leadership in reviewing and developing curriculum. | | | | | |
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| 4. Establishes curriculum needs of special students. | | | | | |
| 5. Makes recommendations for textbooks for school board adoption. | | | | | |
| 6. Maintains a current knowledge of developments in curriculum and instruction. | | | | | |
| 7. Implements the district's philosophy of education. | | | | | |
| Strengths | | | | | |
| | | | | | |
| Areas to Refine | | | | | |
| | | | | | |

| PROFESSIONAL DEVELOPMENT | 1 | 2 | 3 | 4 | 5 |
|-----------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| 1. Inspires others to high professional standards. | | | | | |
| 2. Assists schools in evaluating their current operations and professional development needs. | | | | | |
| 3. Provides a climate for professional development of staff through in-service workshops and professional activities. | | | | | |
| Strengths | | | | | |
| Areas to Refine | | | | | |

| STUDENT SERVICES | 1 | 2 | 3 | 4 | 5 |
|-------------------------------------------------------------------------|---|---|---|---|---|
| 1. Develops regulations to implement student services. | | | | | |
| 2. Monitors student personnel services. | | | | | |
| 3. Monitors the student record system. | | | | | |
| 4. Implements programs relating to behavior and discipline of students. | | | | | |
| 5. Maintains programs for health and safety of students. | | | | | |
| Strengths | | | | | |
| Areas to Refine | | | | | |

| SUPERVISION | 1 | 2 | 3 | 4 | 5 |
|-------------------------------------------------------|---|---|---|---|---|
| 1. Establishes self as educational leader. | | | | | |
| 2. Delegates responsibilities wisely. | | | | | |
| 3. Works within federal and state mandates. | | | | | |
| 4. Ensures that teachers involved in decision-making. | | | | | |
| 5. Reinforces positive efforts. | | | | | |

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|---------------------------------------------------------------------------------------------------------------------------------|--|--|--|--|--|
| 6. Ensures administration of personnel policies and programs. | | | | | |
| 7. Has a recruitment plan and organizes recruitment of personnel. | | | | | |
| 8. Recommends the assignment of personnel to schools and offices. | | | | | |
| 9. Plans and implements personnel evaluation system that identifies the strengths and weaknesses of employees in the system. | | | | | |
| 10. Oversees the planning and evaluation of the staff development program to address the weaknesses of employees in the system. | | | | | |
| 11. Supervises and evaluates all administrative staff. | | | | | |
| 12. Communicates vision/mission to personnel. | | | | | |
| 13. Knows the budgetary process and the restrictions imposed by state and federal mandates. | | | | | |
| Strengths | | | | | |
| | | | | | |
| Areas to Refine | | | | | |
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FISCAL MANAGEMENT

| BUDGET/BUSINESS & FINANCE | 1 | 2 | 3 | 4 | 5 |
|------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| 1. Prepares school calendar and annual budget with appropriate input. | | | | | |
| 2. Completes and files, in a timely fashion, all required forms, and reports. | | | | | |
| 3. Prepares and recommends a budget that is fiscally sound and reflects the district's educational priorities. | | | | | |
| 4. Advises the school board of all possible sources of funding that might be available to implement present or contemplated district programs. | | | | | |
| 5. Determines that funds are administered wisely and adequate control and accounting are maintained. | | | | | |
| 6. Keeps the board routinely informed as to status of the operating accounts of the budget. | | | | | |
| 7. Involves the staff in the budget process. | | | | | |
| 8. Reports to the school board on the financial | | | | | |

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|------------------------------------------------------------------------------------|--|--|--|--|--|
| condition of the school system. | | | | | |
| 9. Ensures that expenditures are within limits approved by the school board. | | | | | |
| 10. Monitors compliance with policies and laws. | | | | | |
| 11. Establishes and monitors procedures for procurement of equipment and supplies. | | | | | |
| Strengths | | | | | |
| Areas to Refine | | | | | |

| INFRASTRUCTURE | 1 | 2 | 3 | 4 | 5 |
|--------------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| 1. Keeps informed on needs of the school program, physical plant, facilities, equipment, supplies, and code compliance requirements. | | | | | |
| 2. Prepares long/short-range plans for facilities and sites. | | | | | |
| 3. Maintains and implements policies for the use of school property. | | | | | |
| 4. Ensures the maintenance of school property. | | | | | |
| 5. Monitors construction, renovations, or demolition of school facilities. | | | | | |
| 6. Oversees and implements policies for safe school facilities. | | | | | |
| 7. Monitors the student transportation system. | | | | | |
| Strengths | | | | | |
| Areas to Refine | | | | | |

CLIMATE

| STAFF AND PERSONNEL | 1 | 2 | 3 | 4 | 5 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| 1. Develops and executes sound personnel procedures and practices. | | | | | |
| 2. Treats all personnel fairly, without favoritism or discrimination, while insisting on performance of duties. | | | | | |
| 3. Evaluates performance of staff members, giving commendation for good work as well as constructive suggestions for improvement. | | | | | |
| 4. Maintains open communication. | | | | | |
| 5. Is an active listener. | | | | | |
| 6. Makes recommendations for employment, discipline, or promotion of personnel in writing with supporting data; accepts responsibility for recommendations. If the recommendation is not accepted by the board, willingly finds another person to recommend. | | | | | |
| 7. Receives recommendations for personnel from board members with an open mind but applies the same criteria for selection for recommendation as applies to applications from another source. | | | | | |
| 8. Maintains up-to-date job descriptions for all personnel. | | | | | |
| 9. Assist board in negotiations with teachers and administrative units and acts as liaison between the board and other bargaining units. | | | | | |
| 10. Delegates authority to subordinates when appropriate. | | | | | |
| 11. Holds periodic meetings with school-site teams and committees. (School Site Council, English Learner Advisory Committee, School Leadership Team, Staff, etc.) | | | | | |
| Strengths | | | | | |
| Areas to Refine | | | | | |

| COMMUNITY RELATIONS | 1 | 2 | 3 | 4 | 5 |
|-----------------------------------------------------------------------------------------|---|---|---|---|---|
| 1. Solicits and gives attention to problems and opinions of all groups and individuals. | | | | | |
| 2. Develops friendly and cooperative relations with the news media. | | | | | |
| 3. Keeps the public aware of school activities and events. | | | | | |
| 4. Achieves status as a community leader in public education. | | | | | |
| 5. Involves the community in planning and problem solving for the schools. | | | | | |
| 6. Articulates educational programs and needs to the community. | | | | | |
| 7. Participates in community affairs. | | | | | |
| 8. Is visible to students, parents, and staff in the schools. | | | | | |
| 9. Acts as liaison between schools and community social agencies. | | | | | |
| 10. Fosters positive morale and spirit within the district. | | | | | |
| Strengths | | | | | |
| | | | | | |
| Areas to Refine | | | | | |
| | | | | | |

| TEACHER RELATIONS | 1 | 2 | 3 | 4 | 5 |
|----------------------------------------------------------------------------------|---|---|---|---|---|
| 1. Motivates and inspires professional growth and development. | | | | | |
| 2. Serves as a role model. | | | | | |
| 3. Is able to resolve grievance issues without involving the board of education. | | | | | |
| 4. Supports and guides teachers in meeting the district's expectations of them. | | | | | |
| 5. Acts as liaison between the school board and school personnel. | | | | | |
| Strengths | | | | | |
| Areas to Refine | | | | | |

RELATIONSHIP WITH THE BOARD AND BOARD MEMBERS

| POLICY | 1 | 2 | 3 | 4 | 5 |
|--------------------------------------------------------------------------------------------|---|---|---|---|---|
| 1. Interprets and executes board policy. | | | | | |
| 2. Supports board policy and actions to the public and staff. | | | | | |
| 3. Understands role in administration of board policy. | | | | | |
| 4. Keeps the board informed of new developments in course content and teaching techniques. | | | | | |
| 5. Exhibits respect and trust and endeavors to develop the same with the board. | | | | | |
| 6. Strives to achieve unity among diverse viewpoints. | | | | | |
| 7. Has a harmonious working relationship with the board. | | | | | |
| Strengths | | | | | |
| Areas to Refine | | | | | |

| MEETING PREPARATION AND PARTICIPATION | 1 | 2 | 3 | 4 | 5 |
|---------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| 1. Recommends actions and alternatives to the board. | | | | | |
| 2. Informs the board rules and regulations of the California State Board of Education state and federal laws. | | | | | |
| 3. Informs the board about current trends and developments in education. | | | | | |
| 4. Keeps the board informed on issues, needs, and operation of the school system. | | | | | |
| Strengths | | | | | |
| Areas to Refine | | | | | |

| RAPPORT | 1 | 2 | 3 | 4 | 5 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| 1. Remains impartial to the board, treating all board members alike. | | | | | |
| 2. Respects the right of individual board members to express their opinion even though she/he may not be in agreement. | | | | | |
| 3. After an official position has been reached, supports the decision of the board. | | | | | |
| 4. Refrains from criticism of members of the board. | | | | | |
| 5. Maintains communication. | | | | | |
| 6. Informs board members of pending state or federal legislation that could influence their decisions. | | | | | |
| 7. Keeps board informed on issues, needs, and operations of the school system. | | | | | |
| 8. Offers professional advice to the board on items requiring board action, with appropriate recommendations based on thorough study and analysis. | | | | | |
| 9. Seeks and accepts constructive criticism of work. | | | | | |
| 10. Has a harmonious work relationship with the board. | | | | | |
| 11. Accepts responsibility for maintaining liaison between the board and personnel, working towards a high degree of understanding between the staff and the board, and the board and staff. | | | | | |
| 12. Goes immediately and directly to the board when he/she feels an honest, objective difference of opinion exists between him/her and any or all members of the board, in an effort to resolve such differences immediately. | | | | | |
| Strengths | | | | | |
| Areas to Refine | | | | | |

PERSONAL/PROFESSIONAL QUALITIES

| PERSONAL/PROFESSIONAL QUALITIES | 1 | 2 | 3 | 4 | 5 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| 1. Maintains his/her professional development by reading, attending conferences, working on professional committees, visiting other districts, and meeting with other superintendents. | | | | | |
| 2. Has his/her own plan for attaining CEU's in a planned program of activities. | | | | | |
| 3. Energetic and devotes the time necessary to meet the responsibilities of his/her position. | | | | | |
| 4. Uses language effectively in dealing with staff members, the board, and the public. | | | | | |
| 5. Completes tasks in a timely manner, i.e., a realistic balance between quality and quantity. | | | | | |
| 6. Stimulates new ideas in others. | | | | | |
| 7. Independently sees the need for, and takes action required to carry out his/her responsibilities. | | | | | |
| 8. Oversees planning and evaluation of curriculum and instruction. | | | | | |
| 9. Communicates vision/mission to school personnel. | | | | | |
| Strengths | | | | | |
| | | | | | |
| Areas to Refine | | | | | |
| | | | | | |

GOALS FOR 2022-23 SCHOOL YEAR

Below, please recommend at least 5 goals you would like to see the Superintendent reach during the 22-23 school year.

FORMAL PERFORMANCE REVIEW RESULTS

This is to confirm that I have met with the Board and reviewed the above evaluation. I understand this evaluation shall be placed in my personnel file.

Isidro Rodriguez, Superintendent/Principal

____/____, 2022

This is to confirm that the Ducor Union Elementary School District Board of Education has met with the Superintendent and reviewed the above evaluation.

Mary McGill
President, Board of Trustees

____/____, 2022