



SUNNYSIDE UNION SCHOOL DISTRICT

21644 Avenue 196 - Strathmore, California 93267 - (P) 559-568-1741 - www.sunnysideunion.com

BOARD OF EDUCATION

AGENDA

For the Regular Board Meeting of Tuesday, February 11, 2020, at 6:00 p.m., in the **Multi-Purpose Room**, at Sunnyside Elementary School, 21644 Avenue 196, Strathmore, California.

I. CALL TO ORDER

A. Attendees

BOARD OF EDUCATION

	Present	Absent	Late
Kimberly Braziel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> : _____
Schuyler Glover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> : _____
Humberto Quezada (Vice President)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> : _____
Humberto Cárdenas (President)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> : _____
Andy Manning (Clerk)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> : _____

II. ADA ACCOMMODATION REQUIREMENT

- A. Persons who are in need of a disability-related modification or accommodation to participate in the board meeting must request in writing to the District Office of the Superintendent-Principal, 21644 Avenue 196, Strathmore, California, 559-568-1741 x. 203. A request or accommodation should specify the nature of the modification or accommodation requested, including any necessary auxiliary aids or services required and the name and telephone number of the person making the request. The written request should be done as soon as possible and no later than two days before the meeting. The agenda, agenda packet and any written documents distributed to the board during a public meeting will be made available in appropriate alternative formats upon request by a person with a disability as required by the Americans with Disabilities Act.
- B. Written documents concerning agenda items are available for public inspection during normal business hours within 72 hours of a regular board meeting at the Sunnyside Union School District Office, 21644 Avenue 196 in Strathmore, California.

III. GENERAL BUSINESS

- A. Pledge of Allegiance (Student and Administrator Video Presentation)
- B. Welcome (visitors please sign-in on visitor's sheet)
- C. Approve the Agenda of the February 11, 2020, Regular Board Meeting
MOTION BY: _____ SECOND BY: _____ VOTES: _____

IV. PUBLIC COMMENTS

Members of the public may address the board on any items within the board's jurisdiction, but which are not on the agenda (Public input for agenda items are accepted, at the time the matter is considered. Individual speakers shall be allowed three minutes to address the Board on each agenda or non-agenda item. The total time limit for input on each item is 15 minutes).

Board of Trustee: Kimberly Braziel | Humberto Cardenas | Schuyler Glover | Andy Manning | Humberto Quezada
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V. ACKNOWLEDGEMENTS AND REPORTS

A. Acknowledgements

- a. Student of the Month for December/January

B. Staff Reports

- a. Employee Groups (Certificated, Classified, Confidential)
- b. Save the Children
- c. Vice Principal – Categorical Manager
- d. Superintendent-Principal

VI. ROUTINE MATTERS – ACTION REQUIRED

A. Consent Calendar

- a. Approve payroll for January 2020
- b. Approve the Pay Vouchers/Purchase Orders for January 9th, 16th of 2020
- c. Approve the January 14, 2020, Governing Board Meeting Minutes
- d. Approve the January 28, 2020, Special Governing Board Meeting Minutes
- e. Approve the following Professional Developments:
 - i. Instructional Team w/Superintendent-Principal to attend the CISC Symposium, Monterey, February 20 – February 22.
 - ii. Superintendent-Principal to attend Tulare County Small School Districts Annual Summer Retreat, June 24 – June 26, 2020, in Pismo Beach.
 - iii. Superintendent –Principal to attend Courageous Principal Training/Deloitte University, April 24 – April 26, in Dallas, Texas.

MOTION BY: _____ SECOND BY: _____ VOTES: _____

VII. NEW BUSINESS

ACTION ITEMS

- A. Approve the 2019-2020 School Year Agency Agreement for Health/School Nursing Services between Sunnyside School District and the Tulare County Superintendent of School Office

MOTION BY: _____ SECOND BY: _____ VOTES: _____

- B. Approve donation list for student fundraising event.

MOTION BY: _____ SECOND BY: _____ VOTES: _____

- C. Approve surplus nonusable material list for sell of disposable for January 2020.

MOTION BY: _____ SECOND BY: _____ VOTES: _____

- D. Approve the Participation in the Corporation for Education Network Initiatives in California (CENIC) E-rate Agreement.

MOTION BY: _____ SECOND BY: _____ VOTES: _____

- E. Approve Board Policy 1100 Communication with The Public

MOTION BY: _____ SECOND BY: _____ VOTES: _____

- F. Approve Board Policy 6173.2 Education of Children of Military Families

MOTION BY: _____ SECOND BY: _____ VOTES: _____

- G. Approve Administrative Regulation 6173.2 Education of Children of Military Families

MOTION BY: _____ SECOND BY: _____ VOTES: _____

- H. Approve Administrative Regulation 6183 Home and Hospital Instruction

MOTION BY: _____ SECOND BY: _____ VOTES: _____

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I. Approve Exhibit 6183 Home and Hospital Instruction

MOTION BY: _____ **SECOND BY:** _____ **VOTES:** _____

J. Approve Board Bylaws 9322 Agenda/Meeting Materials

MOTION BY: _____ **SECOND BY:** _____ **VOTES:** _____

K. Approve Board Bylaws 9324 Minutes and Recordings

MOTION BY: _____ **SECOND BY:** _____ **VOTES:** _____

VIII. INFORMATION AND DISCUSSION

A. LOCAL CONTROL AND ACCOUNTABILITY PLAN & BUDGET

- a. Update on the 2019-2020 Local Control Accountability Plan
- b. Review of First Period Interim Report, 2019-2020
- c. Develop and Review Initial Proposed List of Goal/Actions for 2020-21 LCAP.

B. OPERATIONS

- a. Review of Proposed Budget Items for 2020-21 Budget
- b. Received and Review Annual Report from CRMA Liability Site Inspection
- c. Review of Parent Communication Document and Guidelines for Drop Off-Pick Up Point

C. INSTRUCTIONAL SERVICES

- a. Physical Education Report for Spring 2019
- b. Academic Coach Report
- c. Review of the California School Dashboard
 1. 5 x 5 Explorer Tool
 2. Addressing Areas of Concern

D. BOARD

- a. Information packet for Form 700 to be review, completed, signed, and **submitted** at the March Board Meeting.
- b. Review the representative to the 2020 CSBA Delegate Assembly Election (Tulare County); to be voted on at the March 10, 2020, board meeting
- c. Information and discussion on Small School District Association Board Policies.
- d. Review of MEMO from Lozano Smith regarding Independent Contractors

E. ADJOURN TO CLOSED SESSION (Read Items Below)

- a. Public Employee Discipline/Dismissal/Release (Government Code 54597).
- b. Labor Negotiator CSEA – Conference with Labor Negotiator Chapter 675 – (Government Code 54957.6)
- c. Labor Negotiator CTA – Conference with Labor Negotiator Sunnyside/CTA – (Government Code 54957.6)
- d. Labor Negotiator CTA – Conference with Labor Negotiator Sunnyside/CTA – (Government Code 54957.6)

F. ADJOURN TO CLOSED SESSION _____ PM

G. RECONVENE TO OPEN SESSION _____ PM

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H. REPORT OF ACTION TAKEN IN CLOSED SESSION (IF ANY)

IX. NEXT SCHEDULED BOARD MEETING

A. Regular Board Meeting March 10, 2020 (6:00 PM)

X. ADJOURNMENT _____ PM

Board of Trustee: Kimberly Brazier | Humberto Cardenas | Schuyler Glover | Andy Manning | Humberto Quezada
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AGENDA ITEM SUMMARY SHEET

Agenda Heading

- ☐ Closed Session
- ☐ Acknowledgement and Reports
- ☒ Routine Matters – Consent Calendar
- ☐ Information and Discussion
 - ☐ Business
 - ☐ Maintenance, Operations, and Transportation
 - ☐ Instruction
 - ☐ Board
- ☐ Local Control Accountability Plan
- ☒ Action Items

Agenda Item: VI. A. a. Payroll Approval for January 2020

Date: February 11, 2020

Presented By: Candy Alari

Attachments: Yes ☐ No ☒

Summary

The total payroll paid for the month of January, 2020, is \$261,155.14.

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 - ☐ Instruction
 - ☐ Board
- ☐ Local Control Accountability Plan
- ☒ Action Items

Agenda Item: VI. A. b. Approve Pay Vouchers/Purchase Orders for January 9th and 16th of 2020.

Date: February 11, 2020

Presented By: Dena Tallerico or Candy Alari

Attachments: Yes ☒ No ☐

Summary

The following pay vouchers cover invoices processed and paid on January 9th and 16th of 2020, numbering from 200705 - 200766, totaling 89,165.78.

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Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Audit	Flag	EFT
012549	A T & T	PV-200708	12/24/2019		0306025811001		010-00000-0-00000-27000-59000-0-0000	\$43.12			
	A T & T		12/24/2019		0306025811001		PHONE CHARGES 010-00000-0-00000-72000-59000-0-0000	\$18.48			
							Total Check Amount:	\$61.60			
013718	A T & T MOBILITY - ROC	PV-200709	12/16/2019		287257890202		010-07230-0-00000-36000-59000-0-0000 BUS BARN ALARM	\$26.82			
							Total Check Amount:	\$26.82			
013371	A.C.S.A.	PV-200706	1/1/2020		98429		010-00000-0-00000-71500-53000-0-0000 DUES	\$108.52			
	A.C.S.A.		1/1/2020		98429		010-00000-0-00000-72000-53000-0-0000	\$72.99			
							Total Check Amount:	\$181.51			
013630	AAA TRUCK SERVICE INC.	PV-200705	12/19/2019		45415		010-07230-0-00000-36000-56000-0-0000 BUS REPAIRS	\$267.00			
							Total Check Amount:	\$267.00			
012407	AMERICAN FIDELITY ASSURANCE CO	PV-200707	1/1/2020		22635 4537428		010-00000-0-00000-00000-95024-0-0000 CLASSIFIED EMPLOYEES - DISABILITY INSURANCE	\$385.90			G
							Total Check Amount:	\$385.90			
013786	B C MATERIALS	PV-200710	12/20/2019		3209		010-00000-0-00000-81000-56000-0-0000 MIXER RENTAL AND SUPPLIES	\$196.39			
							Total Check Amount:	\$196.39			
012088	CULLIGAN	PV-200711	12/31/2019		66977		010-00000-0-00000-81000-43000-0-0000 BW PURIFIED - 5 GAL	\$94.25			
							Total Check Amount:	\$94.25			
013980	DARRELL W. BLASINGAME	PV-200712	1/3/2020		14442		120-61050-0-00000-27000-56000-0-0000 PRESCHOOL HEATING REPAIRS	\$516.88			
							Total Check Amount:	\$516.88			

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Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
013864	DEMERATH, EILEEN	PV-200713	1/8/2020	200021	ED-JAN20		010-07200-0-11100-10000-42000-0-0203	\$26.50		
	DEMERATH, EILEEN	PV-200714	1/8/2020	200020	ED-JAN20		CLASSROOM BOOKS 010-11000-0-11100-10000-43000-0-0000	\$300.00		
							CLASSROOM SUPPLIES			
							Total Check Amount:	\$326.50		
013977	Duran & Sons Trucking & Servic	PV-200715	1/8/2020		209765		010-07230-0-00000-36000-56000-0-0000	\$231.72		
							BUS REPAIRS			
							Total Check Amount:	\$231.72		
013574	FLYERS ENERGY, LLC	PV-200716	12/31/2019		CFS-2149741		010-07230-0-00000-36000-43000-0-0000	\$298.96		
							BUS FUEL			
							Total Check Amount:	\$298.96		
013797	FRESNO MOBILE RADIO INC.	PV-200717	12/31/2019		41-84955		010-07230-0-00000-36000-59000-0-0000	\$152.00		
							BUS RADIO SERVICE			
							Total Check Amount:	\$152.00		
013795	FRONTIER COMMUNICATIONS	PV-200718	12/19/2019		55956822770602925		010-00000-0-00000-81000-59000-0-0000	\$66.44		
	FRONTIER COMMUNICATIONS	PV-200719	1/1/2020		55956817410615765		PHONE CHARGES 010-00000-0-00000-81000-59000-0-0000	\$286.71		
							Total Check Amount:	\$353.15		
013823	HENDRICK, JEFF	PV-200720	12/19/2019		395031/395028		130-53100-0-00000-37000-43000-0-0000	\$606.06		
							DAIRY PRODUCTS			
							Total Check Amount:	\$606.06		
011557	JORGENSEN & COMPANY	PV-200721	12/20/2019		5851010		130-53100-0-00000-37000-58000-0-0000	\$854.08		
							CAFETERIA SYSTEM CHECK			
							Total Check Amount:	\$854.08		
013409	KNIGHT GUARD ALARM	PV-200722	1/1/2020		47883/47884		010-00000-0-00000-81000-58000-0-0000	\$210.89		
							FIRE AND BURGLAR MONITORING			
							Total Check Amount:	\$210.89		

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Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Audit Flag	EFT
012364	LAKESHORE LEARNING MATERIALS	PV-200723	12/19/2019	200050	1203151219		120-61270-0-00010-10000-44000-0-0000	\$819.97		
	LAKESHORE LEARNING MATERIALS	PV-200724	12/19/2019	200050	1203151219		PRESCHOOL SUPPLIES 120-61270-0-00010-10000-43000-0-0000	\$943.67		
							Total Check Amount:	\$1,763.64		
013374	LANGE PLUMBING SUPPLY	PV-200725	12/6/2019		845482		130-53100-0-00000-37000-44000-0-0000 HOT WATER HEATER FOR CAFETERIA	\$1,347.94		
							Total Check Amount:	\$1,347.94		
013685	MATA, DIANA	PV-200726	12/19/2019		DM-DEC19		010-90271-0-81000-59000-43000-0-1822 VROOM SUPPLIES	\$320.61		
							Total Check Amount:	\$320.61		
013808	Mezorian, Neil	PV-200727	12/18/2019		NM-DEC19		010-07200-0-11100-10000-43000-0-0406 GARDEN SUPPLIES	\$32.33		
							Total Check Amount:	\$32.33		
013984	MICHAEL A. MARTINEZ	PV-200749	11/20/2019		FLOOR CARE		010-81500-0-00000-81100-56000-0-0000 CAFETERIA FLOOR RESTORATION	\$2,000.00	D	
							Total Check Amount:	\$2,000.00		
013742	MID VALLEY DISPOSAL	PV-200728	12/31/2019		1731315		010-00000-0-00000-81000-55000-0-0000 UTILITIES	\$186.38		
							Total Check Amount:	\$186.38		
012047	PITNEY BOWES	PV-200729	12/30/2019		3103649148		010-00000-0-00000-72000-56000-0-0000 LEASING CHARGES	\$191.22		
							Total Check Amount:	\$191.22		
013575	ROCKFORD SCHOOL DISTRICT	PV-200730	1/1/2020		INS-JAN20		010-00000-0-11100-10000-34010-0-0000 HEALTH INSURANCE - SNIDER HENDRICKSON	\$600.17		
							Total Check Amount:	\$600.17		
012831	SISC III	PV-200731	1/1/2020		72181		010-00000-0-00000-71100-34010-0-0000 HEALTH INSURANCE	\$10,087.96		

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012831	SISC III	PV-200731	1/1/2020		72181		010-00000-0-00000-00000-95028-0-0000	\$4,368.70	G	
	SISC III		1/1/2020		72181		HEALTH INSURANCE 010-00000-0-00000-00000-95024-0-0000	\$49,759.70	G	
							Total Check Amount:	\$64,216.36		
012867	SMART & FINAL STORES CORP.	PV-200732	1/1/2020		387572		010-90271-0-81000-59000-43000-0-1822	\$25.55		
	SMART & FINAL STORES CORP.		1/1/2020		387572		VROOM AND CAFETERIA SUPPLIES 130-53100-0-00000-37000-47000-0-0000	\$17.97		
							Total Check Amount:	\$43.52		
005383	SOUTHERN CALIF EDISON CO	PV-200733	12/28/2019		2014706030		010-00000-0-00000-81000-55000-0-0000	\$3,388.23		
	SOUTHERN CALIF EDISON CO		12/28/2019		2014706030		UTILITIES 130-53100-0-00000-81000-55000-0-0000	\$182.08		
							Total Check Amount:	\$3,570.31		
013392	SOUTHWEST SCHOOL & OFFICE	PV-200734	12/12/2019		PINV0663304		010-00000-0-00000-27000-43000-0-0000	\$112.17		
	SOUTHWEST SCHOOL & OFFICE		12/16/2019		PINV0664383		OFFICE SUPPLIES 010-11000-0-11100-10000-43000-0-0000	\$30.49		
	SOUTHWEST SCHOOL & OFFICE		12/16/2019		PINV0664397		CLASSROOM SUPPLIES 010-11000-0-11100-10000-43000-0-0000	\$110.77		
							Total Check Amount:	\$253.43		
012637	STRATHMORE PUBLIC	PV-200737	12/31/2019		10017P-00		010-00000-0-00000-81000-55000-0-0000	\$186.35		
	STRATHMORE PUBLIC		12/31/2019		10017P-00		UTILITIES 130-53100-0-00000-81000-55000-0-0000	\$10.01		
							Total Check Amount:	\$196.36		
012474	SYSO FOOD SERVICES OF MODESTO	PV-200738	12/31/2019		809889		130-53100-0-00000-37000-43000-0-0000	\$67.53		
							CAFETERIA SUPPLIES			
							Total Check Amount:	\$67.53		
013843	THE DISCOVERY CENTER	PV-200739	10/11/2019		8408		010-07200-0-11100-10000-58000-0-0405	\$660.00		
							FIELD TRIP - 02/08/20			
							Total Check Amount:	\$660.00		

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005388	THE GAS COMPANY	PV-200740	12/30/2019		17621639008		010-00000-0-00000-81000-55000-0-0000	\$1,262.34		
	THE GAS COMPANY		12/30/2019		17621639008		UTILITIES 130-53100-0-00000-81000-55000-0-0000	\$67.83		
							Total Check Amount:	\$1,330.17		
013469	TORRES-MARQUEZ, JEANNETTE	PV-200741	12/31/2019		JT-DEC19		MILEAGE 010-00000-0-00000-72000-52000-0-0000	\$27.26		
							Total Check Amount:	\$27.26		
013197	TSUBOI, STEVE	PV-200742	1/5/2020		ST-JAN20		SCHOOL LIGHTS 010-81500-0-00000-81100-43000-0-0000	\$48.81		H
							Total Check Amount:	\$48.81		
013117	TULARE CO. ENVIRONMENTAL HEALT	PV-200743	1/2/2020		IN0183620		SCHOOL KITCHEN S/FOOD PREP 130-53100-0-00000-37000-58000-0-0000	\$390.00		
							Total Check Amount:	\$390.00		
013983	VALLEY PERFORMING ARTS COUNCIL	PV-200744	10/11/2019		FIELD TRIP		FRESNO BALLET FIELD TRIP 010-07200-0-11100-10000-58000-0-0405	\$1,152.00		
							Total Check Amount:	\$1,152.00		
013722	VAST NETWORKS	PV-200745	1/1/2020		19891		INTERNET CONNECTION 010-00000-0-00000-72000-59000-0-0000	\$175.00		
							Total Check Amount:	\$175.00		
007477	VERIZON CALIFORNIA	PV-200746	12/28/2019		9845220464		PHONE CHARGES 010-00000-0-00000-27000-59000-0-0000	\$7.04		
							Total Check Amount:	\$7.04		
006227	WEISENBERGERS ACE HARDWARE	PV-200747	12/31/2019		58867		CAFETERIA AND MAINTENANCE SUPPLIES 010-81500-0-00000-81100-43000-0-0000	\$13.49		
	WEISENBERGERS ACE HARDWARE		12/31/2019		58867		130-53100-0-00000-37000-43000-0-0000	\$48.46		
							Total Check Amount:	\$61.95		

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013652	ZOOM IMAGING SOLUTIONS, INC	PV-200748	12/23/2019		2175838		010-11000-0-11100-10000-58000-0-0000	\$196.70	H	
MAINTENANCE CONTRACT								Total Check Amount:		
								\$196.70		

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Total District Payment Amount: \$83,602.44

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		Batch No 315		Total Accounts Payable:		\$83,602.44				

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 83,602.44 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 *Steve Dault* Date 1/9/2020

Fund Summary	Total
010	\$77,729.96
120	\$2,280.52
130	\$3,591.96
Total	\$83,602.44

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*** FINAL ***

Batch No 316

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Audit Flag	EFT
013718	AT & T MOBILITY - ROC	PV-200750	1/1/2020		287295413373		010-00000-0-00000-72000-59000-0-0000	\$103.36		
	AT & T MOBILITY - ROC		1/1/2020		287295413373		PHONE CHARGES 010-00000-0-00000-27000-59000-0-0000	\$241.20		
							Total Check Amount:	\$344.56		
013650	CMC PROPANE, INC.	PV-200751	1/10/2020		PROPANE		010-00000-0-00000-81000-43000-0-0000	\$12.64		H
							Total Check Amount:	\$12.64		
013901	DOUGLAS RAY HOSFELDT	PV-200766	1/7/2020		23402/23401		010-81500-0-00000-81100-43000-0-0000	\$78.22		
							Total Check Amount:	\$78.22		
013977	Duran & Sons Trucking & Service	PV-200752	1/9/2020		209769		010-07230-0-00000-36000-56000-0-0000	\$815.07		
							Total Check Amount:	\$815.07		
012481	EMPLOYMENT DEVELOPMENT DEPT	PV-200753	1/13/2020		94238409		010-00000-0-00000-00000-95025-0-0000	\$394.28		G
							Total Check Amount:	\$394.28		
013849	GOLDEN EAGLE CHARTER INC	PV-200754	1/9/2020		16965		010-07200-0-11100-10000-58000-0-0403	\$300.00		
							Total Check Amount:	\$300.00		
013376	HOME DEPOT CREDIT SERVICES	PV-200755	1/8/2020		5361		010-00000-0-00000-81000-43000-0-0000	\$24.45		
							Total Check Amount:	\$24.45		
013522	LOWES	PV-200756	1/2/2020		98005439769		120-61050-0-00010-10000-43000-0-0000	\$7.67		
	LOWES		1/2/2020		98005439769		MAINTENANCE SUPPLIES 130-53100-0-00000-37000-43000-0-0000	\$49.95		
	LOWES		1/2/2020		98005439769		010-81500-0-00000-81100-43000-0-0000	\$323.80		
							Total Check Amount:	\$381.42		

Accounts Payable Final Prelist - 1/16/2020 1:04:43PM

*** FINAL ***
Batch No 316

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Audit	Amount	Flag	EFT
013685	MATA, DIANA	PV-200758	1/13/2020		DM-JAN20		010-90271-0-81000-59000-43000-0-1822		\$108.44		
							VROOM SUPPLIES				
									Total Check Amount:		
									\$108.44		
013377	MEDICAL BILLING TECHNOLOGIES	PV-200760	1/6/2020		AR-31066		010-00008-0-00000-27000-58000-0-0000		\$17.60		
							MEDICAL BILLING SERVICES				
									Total Check Amount:		
									\$17.60		
013808	Merzorian, Neil	PV-200759	1/13/2020		NM-JAN20		010-11000-0-11100-10000-43000-0-0000		\$70.86		
							SCIENCE CLASS SUPPLIES				
									Total Check Amount:		
									\$70.86		
013984	MICHAEL A. MARTINEZ	PV-200757	1/20/2019		FLOOR CARE		010-81500-0-00000-81100-56000-0-0000		\$1,500.00		D
							FLOOR RESTORATION				
									Total Check Amount:		
									\$1,500.00		
012968	SAVE MART SUPERMARKET	PV-200761	1/3/2020		TRD-67321		130-53100-0-00000-37000-47000-0-0000		\$21.45		
							CAFETERIA FOOD				
									Total Check Amount:		
									\$21.45		
013392	SOUTHWEST SCHOOL & OFFICE	PV-200762	12/17/2019	200002	PINV0665099		010-11000-0-11100-10000-43000-0-0000		\$2.79		
							CLASSROOM SUPPLIES				
	SOUTHWEST SCHOOL & OFFICE	PV-200763	12/17/2019		PINV0665379		010-00000-0-00000-72000-43000-0-0000		\$31.72		
							OFFICE SUPPLIES				
									Total Check Amount:		
									\$34.51		
013654	TOSHIBA FINANCIAL SERVICES	PV-200764	1/2/2020		403851488		010-11000-0-11100-10000-56000-0-0000		\$1,081.84		D
							COPIER CONTRACT				
									Total Check Amount:		
									\$1,081.84		
013955	VALLEY EXPETEC	PV-200765	2/1/2020		X000772		010-00000-0-00000-72000-58000-0-0000		\$378.00		
							BDR AGREEMENT				
									Total Check Amount:		
									\$378.00		
									Total Check Amount:		
									\$378.00		

Accounts Payable Final Prelist - 1/16/2020 1:04:43PM

*** FINAL ***

Batch No 316

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

Total District Payment Amount: \$5,563.34

Accounts Payable Final Prelist - 1/16/2020 1:04:43PM

*** FINAL ***

Batch No 316

Audit

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
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Batch No 316

Total Accounts Payable:

\$5,563.34

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 5,563.34 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 1/16/20

Fund Summary

	Total
010	\$5,484.27
120	\$7.67
130	\$71.40
Total	\$5,563.34



SUNNYSIDE UNION SCHOOL DISTRICT

21644 Avenue 196 - Strathmore, California 93267 - (P) 559-568-1741 - www.sunnysideunion.com

AGENDA ITEM SUMMARY SHEET

Agenda Heading

- ☐ Closed Session
- ☐ Acknowledgement and Reports
- ☒ Routine Matters – Consent Calendar
- ☐ Information and Discussion
 - ☐ Business
 - ☐ Maintenance, Operations, and Transportation
 - ☐ Instruction
 - ☐ Board
- ☐ Local Control Accountability Plan
- ☒ Action Items

Agenda Item: VI. A. c. Approve Minutes from January 14, 2020, Regular Governing Board Meeting

Date: February 11, 2020

Presented By: Jeannette Torres-Marquez

Attachments: Yes



No



Summary

The attached board meeting minutes are from the board meeting held on January 14, 2020. The notes on the minutes are from the information gathered during the board meeting.

Board of Trustee: Kimberly Brazil | Humberto Cardenas | Schuyler Glover | Andy Manning | Humberto Quezada
Administration: Steve Tsuboi, Superintendent-Principal | Jody Gunderman, Vice Principal-Categorical Manager
Candy Alari, Business Manager | Jeannette Torres-Marquez, Administrative Secretary



Sunnyside Union Elementary School
Governing Board Minutes
January 14, 2020
6:00 pm – Multi-Purpose Room

- I. CALL TO ORDER AT 6:01 PM
 - A. Attendees
 - Board of Education Present: Schuyler Glover, Humberto Quezada, Humberto Cárdenas, Andy Manning
- II. ADA ACCOMMODATIONS REQUIREMENT
 - A. All Accommodation Meet
 - B. All Accommodation Meet
- III. GENERAL BUSINESS
 - A. Pledge of Allegiance - Presented via video by Amerah Ambriz, Marysol Luna, and Izaac Ibarra students from Mrs. Lawson's class
 - B. Welcome – Miguel Guajardo
 - C. Approve the Agenda of the January 14, 2020, Regular Board Meeting
 - Motion By: Schuyler Glover
 - Second By: Andy Manning
 - Votes: 4-0
- IV. PUBLIC COMMENTS – None
- V. ACKNOWLEDGMENTS AND REPORTS
 - A. **ACKNOWLEDGMENTS** - None
 - B. **STAFF REPORTS**
 - a. Employee Groups (Certificated, Classified, Confidential)
 - b. Save the Children - Ms. Mata sent her report via email to Mr. Tsuboi to read to the board; see attached.
 - c. Vice Principal – Categorical Manager – Mrs. Gunderman thanked the board for the two weeks and two days off during the break. During her four days last week, she caught up with her paperwork and filing. She then let the board know that this week she is working with the psychologist and some students with special needs.
 - d. Superintendent-Principal – Mr. Tsuboi provided his report in the board packet. He asked the board if they had any questions regarding any of the items. There were no questions asked by the board. Mr. Tsuboi then briefly let the board know that the sixth-grade auction went well, and fourteen of the eighteen special seating in the front of the auditorium were sold, which gave the class some funds to add to the trip. The event that night brought in \$700; a great start.
- VI. ROUTINE MATTERS – ACTION REQUIRED
 - A. Consent Calendar
 - General Business**
 - a. Approve payroll for November 2019, in the amount of \$261,916.01.
 - b. Approve the December 10, 2019, Governing Board Meeting Minutes
 - c. Approve the December 17, 2019, Special Governing Board Meeting Minutes
 - d. Approve Pay Vouchers/Purchase Orders for December 10th and 23rd of 2019, numbering from 200651 – 200704, totaling \$28,646.47.
 - Motion By: Schuyler Glover
 - Second By: Humberto Quezada
 - Votes: 4-0
- VII. NEW BUSINESS – ACTION ITEMS
 - A. Approve Budget Revision for 2019-2020 SY - Mrs. Alari briefly updated the board on the budget changes to Title I resource funds for Philip the intervention teacher, wages and benefits for costs, and decreased Preschool funds for spending; not too many changes.

Motion By: Schuyler Glover
Second By: Andy Manning
Votes: 4-0

- B. Discuss and approve setting special Budget/LCAP board meeting – Mr. Tsuboi briefly explained to the board that a date needed to be scheduled for them to meet to discuss the Budget, LCAP, and the direction they would like him to proceed with for the school. The board set the date for January 28, 2020.

Motion By: Schuyler Glover
Second By: Humberto Quezada
Votes: 4-0

- C. Approve the 4th Quarter Williams Valenzuela Complaint Survey Report. Mrs. Torres-Marquez explained to the board that this is a quarterly report that needs to be approved to meet the annual audit.

Motion By: Humberto Quezada
Second By: Schuyler Glover
Votes: 4-0

- D. Approve donation list for student fundraising event. Tabled; item will be added monthly as needed to approve fundraising events.

- E. Approve surplus nonusable material list for sell of disposable for January 2020. Tabled; item will be added monthly as needed to approve surplus items.

- F. Approve Board Policy 5141.52 Suicide Prevention.

Motion By: Schuyler Glover
Second By: Humberto Quezada
Votes: 4-0

- G. Approve Administrative Regulation 5141.52 Suicide Prevention

Motion By: Schuyler Glover
Second By: Humberto Quezada
Votes: 4-0

- H. Approve Board Policy 5144 Student Discipline

Motion By: Schuyler Glover
Second By: Andy Manning
Votes: 4-0

- I. Approve Administrative Regulation 5144 Student Discipline

Motion By: Andy Manning
Second By: Humberto Quezada
Votes: 4-0

- J. Approve Board Policy 6175 Migrant Education Program

Motion By: Schuyler Glover
Second By: Andy Manning
Votes: 4-0

- K. Approve Administrative Regulation 6175 Migrant Education Program

Motion By: Andy Manning
Second By: Humberto Quezada
Votes: 4-0

VIII. INFORMATION AND DISCUSSION

A. LOCAL CONTROL AND ACCOUNTABILITY PLAN & BUDGET

- a. Update on the 2019-2020 Local Control Accountability Plan - Mr. Tsuboi let the board know that so far, the LCAP looks good. The funds are being used for School Safety, Technology, Training, and Conferences as planned.

- b. Discussion on the 2020-2021 Local Control Accountability Plan – Stakeholder Input, Stakeholder Surveys, Timeline - Mr. Tsuboi briefly explained that he collected survey data during Grandparent's Day, but that he was going to put together an easy survey for parents to complete during Parent-Teacher Conferences. He also let the board know that he was sending Mr. Tredway to LCAP training so he can learn how it works when tracking the budget.

B. OPERATIONS

- a. Review and discussion of Annual Pesticide Report as presented by Operations staff - Mr. Tsuboi briefly updated the board on the pesticide report. He let the board know that Brian Roberts is working on the report and will submit it to the State to remain in compliance.
- b. Review and discussion of Sunnyside Pick-up and Drop Off points in school parking lot - Mr. Tsuboi let the board know that we would have been completed with the drop-off and pick-up area, but during the three week break cement trucks were not running. We have completed the move of the fence, the initial dig out of the area, and working on the cementing and moving the pump house that does not have a foundation at this time. We should be completed by the end of January. The maintenance crew are working on the reconfiguring of the front for preschool.

C. INSTRUCTIONAL SERVICES

- a. Review and discussion of the California School Dashboard - Mr. Tsuboi briefly showed the board on the big TV screen on how to login to the Dashboard and navigate through the program to see the student data.
- b. Review and discussion of the 2020-2021 School Calendar - Mr. Tsuboi briefly updated the board on the changes to the school calendar, so that it lines up with PUSD. He let them know that by moving the Mondays to Wednesdays will help except a few days that we are out. The changes will not affect the number of hours we need to meet for the year. The only downfall is that we will end one week later, but in the long run that with during graduations, no conflicts with dates.
- c. Review and discussion of Local Assessments (report from Instructional Coach) - Mr. Tsuboi briefly updated the board on instructional coaching and the collaboration between teacher and coach to find good strategies for student learning. He invited the board to stop by to watch the developing learning techniques with the groups.

D. STUDENT ACTIVITIES

- a. Results of the 2019 School Wide Science Day Activity - Mr. Tsuboi briefly update the board on the school-wide science activity from TK-8th grade held on December 20, 2019. It was interesting to see how the teams were selected and worked together to create a way to hold up a large marshmallow with eight spaghetti noodles, and tape. It was especially interesting to watch TK-3rd grade. Next year, we want to choose teams that have one student from each grade level to see how they brainstorm together as a group to complete the project.
- b. Results of the 2019 Junior High Science Day Competition- Mr. Tsuboi briefly update the board on the junior high science competition held on the last day before winter break. There were groups of kids that had sixteen, eighteen, or twenty students on each team. The groups had 30 minutes to create a prototype before creating their structure. The winner of the competition was able to hold up 32 water bottles before collapsing. The students used cardstock paper and tape to assemble the project. It was interesting to watch!
- c. Update on Sunnyside Athletic Program- Mr. Tsuboi briefly update the board on the athletic program. He let the board know that soccer finished, and we are starting basketball this week. Mrs. Bravo and Mr. Miranda will coach the girl's teams, and Mr. Kimball and Mr. Merzoian will coach the boy's teams. The word is that the other schools want to beat Sunnyside. The tournament will be held in February, and then we begin track season.
- d. Update on Fundraising from the Class of 2020 and Class of 2021 - Mr. Tsuboi briefly updated the board on the fundraising event that was held on December 17th. The event brought in close to \$700. The auction was very successful and made the most money. One item alone brought in \$150; it was a school jersey. Mr. Kimball and Mr. Merzoian are teaching the students how to run a fundraising event, so that they will know what it takes to run a fundraising event, instead of them doing all the work. It has been a great learning experience for the students.
- e. Review of upcoming participation in County Wide Activities – Mr. Tsuboi let the board know that they will run a schoolwide spelling bee to get the finalist for the County Spelling Bee. The TK-8th grade classes will be given spelling lists so that they can get the top three spellers from each group for a Schoolwide Spelling Bee in the auditorium. Mrs. Gunderman said that Mr. Alcantar is hoping to run a live telecast of the event for classrooms. Mr. Tsuboi also let the board know that the school will be participating in a County Reading Competition, Math Bowl, and a Tobacco/Marijuana Bowl.
- f. Discussion on developing a schoolwide student leadership program - Mr. Tsuboi briefly explained to the board that he is looking forward to teaching leadership qualities to students. He is hoping to start with 2nd through 5th-

grade students. By starting with this grade level, it will help prepare them when they get to middle-grade. Middle-grade students get more involved with Student Council, and this is where leadership qualities are valuable. He also said that another great learning tool would be "The Great Shake," it would teach students the importance of a proper handshake.

E. BOARD

- a. Discuss and review board policies (Second Reading)
 - i. Board Policy 1100 Communication With The Public
 - ii. Board Policy 6173.2 Education Of Children Of Military Families
 - iii. Administrative Regulation 6173.2 Education Of Children Of Military Families
 - iv. Administrative Regulation 6183 Home And Hospital Instruction
 - v. Exhibit 6183 Home And Hospital Instruction
 - vi. Board Bylaws 9322 Agenda/Meeting Materials
 - vii. Board Bylaws 9324 Minutes And Recordings
- b. Discussion on Board Reading Presentations

F. BOARD POLICIES FOR REVIEW

- a. The following policies will be presented to the board (First Reading)
 - i. Administrative Regulation 3580 District Records
 - ii. Board Policy 3290 Gifts, Grants and Bequests
 - iii. Board Policy 3320 Claims And Actions Against The District
 - iv. Administrative Regulation 3320 Claims And Actions Against The District
 - v. Administrative Regulation 3460 Financial Reports And Accountability
 - vi. Board Policy 4114 Transfers

G. ADJOURN TO CLOSED SESSION (Read Items Below)

- a. Public Employee Discipline/Dismissal/Release (Government Code 54597).

H. ADJOURN TO CLOSED SESSION AT 7:31 PM

I. RECONVENE TO OPEN SESSION AT 7:36 PM

J. REPORT OF ACTION TAKEN IN CLOSED SESSION (IF ANY) – None

IX. NEXT SCHEDULED BOARD MEETING

- A. Regular Board Meeting: February 11, 2020 (6:00 PM)

X. ADJOURNMENT AT 7:37 PM

Respectfully Submitted,

Andy Manning, Clerk



Steve Tsuboi <stsuboi@sunnysideunion.com>

Save the Children Activities

1 message

Diana Mata <dmata@sunnysideunion.com>

To: Steve Tsuboi <stsuboi@sunnysideunion.com>

Tue, Jan 14, 2020 at 2:25 PM

Steve,

Handed out Vroom Tee Shirts to all the Parent Participants in the 23-5 Book Bag Program, handing out a total of 42 Tee Shirts. In order to receive a free shirt, parents had to actively submit 3 monthly calendars showing how many times they read to their child. Parents were very happy to receive such a gift. Parents were also given packets of activities they could do as a family during the winter break.

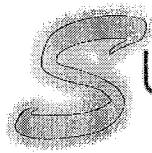
Home Visits went well, just a little on the cold side, but the children really enjoyed playing family games and helping the younger sibling with developing skills needed to succeed. I enrolled 2 new pregnant mom and 3 toddlers.

This month, the Parent/Child Group will focus on sharing with parents different activities they can do to help their child build "engineering skills". We will start with reading "This Is Not A Box". Parents will have the opportunity to create projects with their child that can be used at home.

We will be having parents fill out a First 5 Survey- healthy habits, early education, family schedules, and community resources.

On Jan. 23-25, the Save the Children Team will be holding a Yearly Cluster Meeting at The Pines Resort near Oakhurst. We will be team building and sharing program goals.

Diana



SUNNYSIDE UNION SCHOOL DISTRICT

21644 Avenue 196 - Strathmore, California 93267 - (P) 559-568-1741 - www.sunnysideunion.com

AGENDA ITEM SUMMARY SHEET

Agenda Heading

- ☐ Closed Session
- ☐ Acknowledgement and Reports
- ☒ Routine Matters – Consent Calendar
- ☐ Information and Discussion
 - ☐ Business
 - ☐ Maintenance, Operations, and Transportation
 - ☐ Instruction
 - ☐ Board
- ☐ Local Control Accountability Plan
- ☒ Action Items

Agenda Item: VI. A. d. Approve Minutes from January 28, 2020, Special Governing Board Meeting

Date: February 11, 2020

Presented By: Jeannette Torres-Marquez

Attachments: Yes ☒ No ☐

Summary

The attached board meeting minutes are from the special board meeting held on January 28, 2020.
The notes on the minutes are from the information gathered during the board meeting.

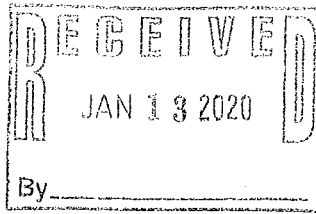
Board of Trustee: Kimberly Brazier | Humberto Cardenas | Schuyler Glover | Andy Manning | Humberto Quezada
Administration: Steve Tsuboi, Superintendent-Principal | Jody Gunderman, Vice Principal-Categorical Manager
Candy Alari, Business Manager | Jeannette Torres-Marquez, Administrative Secretary

Sunnyside Union Elementary School
Special Governing Board Minutes
January 28, 2020
6:00 pm – STEM Room, Room 17

- I. CALL TO ORDER AT 6:06 PM
 - A. Attendees
 - Board of Education Present: Kimberly Braziel, Humberto Quezada, Andy Manning
- II. ADA ACCOMMODATIONS REQUIREMENT
 - A. All Accommodation Meet
 - B. All Accommodation Meet
- III. GENERAL BUSINESS
 - A. Pledge of Allegiance – Humberto Quezada
 - B. Welcome – None
 - C. Approve the Agenda of the January 28, 2020 Special Board Meeting
 - Motion by: Kimberly Braziel
 - Second by: Andy Manning
 - Votes: 3-0
- IV. PUBLIC COMMENTS – None
- V. INFORMATION AND DISCUSSION
 - A. Governing Board Planning Meeting for 2020-2021 (Budget Development, Local Control and Accountability Plan, and General Goal Setting). Mr. Tsuboi asked the board if they had any suggestions or recommendations for the 2020-2021 budget in regards to the school. The board did not have any suggestions to discuss but asked Mr. Tsuboi to bring a prioritized list to the February 11th board meeting so that they can review the suggested items for next year's budget. The After School Interventions were also discussed. Mr. Tsuboi is to look into the feasibility of a 2-3 hour program after school.
- VI. NEXT SCHEDULED BOARD MEETING
 - A. Regular Board Meeting: February 11, 2020 (6:00 PM)
- VII. ADJOURNMENT AT 6:54 PM

Respectfully Submitted,

Andy Manning, Clerk



For TCOE Office Use	
Vendor #	_____
Req. #	_____
PO #	_____
Contract #	_____
TCOE CONTRACT #: <u>200577</u>	

AGENCY AGREEMENT

THIS AGREEMENT, is entered into between the **Tulare County Superintendent of Schools**, referred to as SUPERINTENDENT and **Sunnyside Union School District**, referred to as DISTRICT.

ACCORDINGLY, IT IS AGREED:

- TERM:** This Agreement shall become effective as of August 1, 2019 and shall expire on June 30, 2020.
- SERVICES:** SUPERINTENDENT shall provide services as set forth: (See attached Exhibit for details. The Exhibit is made part of this Agreement by reference.)
Provide a qualified staff member(s) pursuant to Education Code section 44872, 44267.5 and 44877 to perform health/school nursing services including:
 - Conducting medical case finding, screening and referral activities related to health defects of pupils.
 - Referring parents of pupils needing medical care or welfare assistance to appropriate resources.
 - Conducting a program directed toward the control of communicable diseases in the school and community.
 - Serving as a health education resource person to staff and pupils.
- COST OF SERVICES:** DISTRICT agrees to pay SUPERINTENDENT the sum of **\$34,094.00** for **Health/School Nursing services** for **35 days** as provided in this Agreement. Salary and benefits are estimated and will be adjusted to actual costs.
 - Pay all mileage directly to the staff member(s) for travel from the SUPERINTENDENT'S central office to the assigned areas and back to SUPERINTENDENT'S central office.
 - Allow staff member(s) time to attend professional conferences associated with the services provided to the DISTRICT.
- METHOD OF PAYMENT:** District agrees to pay SUPERINTENDENT for Health/School Nursing services as provided in this Agreement. Pursuant to Education Code section 1752, SUPERINTENDENT shall transfer this sum from the funds of DISTRICT to the County School Service Fund after **March 1, 2020**.
- INDEMNIFICATION:** SUPERINTENDENT and DISTRICT shall hold each other harmless, defend and indemnify their respective agents, officers and employees from and against any liability, claims, actions, costs, damages or losses of any kind, including death or injury to any person and/or damage to property, arising out of the activities of SUPERINTENDENT or DISTRICT or their agents, officers and employees under this Agreement. This indemnification shall be provided by each party to the other party regarding its own activities undertaken pursuant to this Agreement, or as a result of the relationship thereby created, including any claims that may be made against either party by any taxing authority asserting that an employer-employee relationship exists by reason of this Agreement, or any claims made against either party alleging civil rights violations by such party under Government Code section 12920 et seq. (California Fair Employment and Housing Act). This indemnification obligation shall continue beyond the term of this Agreement as to any acts or omissions occurring under this Agreement or any extension of this Agreement.
- TERMINATION:** Either party may terminate this Agreement without cause by giving thirty (30) calendar days advance written notice to the other party.

THE PARTIES, having read and considered the above provisions, indicate their agreement by their authorized signatures below.

DISTRICT
Sunnyside Union School District
21644 Ave. 196
Strathmore, CA 93267

SUPERINTENDENT
Tim A. Hire, County Superintendent of Schools
Business Services
Tulare County Office of Education
P.O. Box 5091
Visalia CA 93278-5091

By: _____

By:  _____

Date: _____

Date: 12/27/19

TCOE Program Information

Contact Person and Phone No.: Nan Arnold, Program Manager, (559) 651-0130 ext. 3710
Division: Instructional Services
Program Title: School Health Programs
Budget Number: 010-00040-0-000000-000000-86770-0-0-0

Please return an original copy to:

Tulare County Office of Education
ATTN: Elizabeth Sisk, Business Services Secretary
P.O. Box 5091
Visalia, CA 93278-5091

SUNNYSIDE UNION SCHOOL DISTRICT

21644 Avenue 196 - Strathmore, California 93267 - (P) 559-568-1741 - www.sunnysideunion.com

From: Sunnyside Union Elementary

County: Tulare

This Letter of Agency (LOA) is to confirm participation in the Corporation for Education Network Initiatives in California (CENIC) E-rate Consortium as an eligible member entity for E-rate discounts in, 2020-21, 2021-22, 2022-23, 2023-24, and 2024-25 E-rate application years. I authorize CENIC (E-rate Entity No. 225495), under contract with the Imperial County Office of Education (ICOE), to act on my behalf in matters related to the federal E-rate discount program for the purposes of securing those discounts on eligible telecommunications services.

I authorize CENIC, as the consortium lead, to have rights under the USAC's E-rate Productivity Center (EPC), or any future iterations of E-rate application processing, to act on behalf of my entity in activities related to the consortium, including but not limited to filing, submitting and certifying forms.

I understand that in submitting E-rate forms which include us in the consortium, CENIC is making certifications for our school system. By signing this LOA, I make the following certifications on behalf of our entity:

- (a) I certify that our agency, school district, school system, or school has complied with all E-rate program rules and I acknowledge that failure to do so may result in denial of discount funding and/or cancellation of funding commitments. I acknowledge that failure to comply with program rules could result in civil or criminal prosecution by the appropriate law enforcement authorities.
- (b) I certify that I will retain required documents for a period of at least ten years after the last day of service delivered. I certify that I will retain all documents necessary to demonstrate compliance with the statute and Commission rules regarding the application for, receipt of, and delivery of services receiving schools and libraries discounts, and that if audited, I will make such records available to the Administrator. I acknowledge that I may be audited pursuant to participation in the schools and libraries program.
- (c) I certify that I am authorized to sign this Letter of Agency and, to the best of my knowledge, information, and belief, all information provided to the CENIC E-rate Consortium for E-rate submission is true.

I understand that participating in the CENIC E-rate consortium does not affect my entity's ability to apply for and receive E-rate discounts on eligible services received directly by my entity.

I understand that persons willfully making false statements on the E-rate forms or through this LOA can be punished by fine or forfeiture, under Communications Act, 47 U.S.C. §§ 502, 503(b), or fine or imprisonment under Title 18 of the United States Code, 18 U.S.C.

Board of Trustee: Kimberly Braziel | Humberto Cardenas | Schuyler Glover | Andy Manning | Humberto Quezada
Administration: Steve Tsuboi, Superintendent-Principal | Jody Gunderman, Vice Principal-Categorical Manager
Candy Alari, Business Manager | Jeannette Torres-Marquez, Administrative Secretary

LEA INFORMATION

Sunnyside Union Elementary

Printed Name of School System (District, COE, ROP)

54721810000000

School System's 14-digit County-District-School Number (CDS Number)

1538693

School District FCC Registration Number (FCC RN)

143901

USAC/E-rate Billed Entity Number (BEN)

559-568-1741

Phone number for School System

SIGNER INFORMATION

February 6, 2020

Signature of authorized person

Date Signed

Steve Tsuboi

Printed name (first last) of authorized person

Superintendent-Principal

Title or position of authorized signer

CONTACT INFORMATION

Printed name (first last) of contact person, if different from signer

Phone number for contact person

Email for contact person

Community Relations

BP 1100(a)

Communication With The Public

The Governing Board recognizes the district's responsibility to keep the public informed regarding the goals, programs, achievements, and needs of the schools and district and to be responsive to the concerns and interests of the community. The Superintendent or designee shall establish strategies for effective two-way communications between the district and the public and shall consult with the Board regarding the role of Board members as advocates for the district's students, programs, and policies.

(cf. 5020 - Parent Rights and Responsibilities)

(cf. 9000 - Role of the Board)

The Superintendent or designee shall provide the Board and staff with communications protocols and procedures to assist the district in presenting a consistent, unified message on district issues. Such protocols and procedures may include, but are not limited to, identification of the spokesperson(s) authorized to speak to the media on behalf of the district, strategies for coordinating communications efforts and activities, and legal requirements pertaining to confidentiality as well as the public's right to access records.

(cf. 1112 - Media Relations)

(cf. 1340 - Access to District Records)

(cf. 2111 - Superintendent Governance Standards)

(cf. 3580 - District Records)

(cf. 5125 - Student Records)

(cf. 5125.1 - Release of Directory Information)

(cf. 9005 - Governance Standards)

(cf. 9010 - Public Statements)

(cf. 9011 - Disclosure of Confidential/Privileged Information)

The Superintendent or designee shall utilize a variety of methods to provide information to the public with access to information. Such methods may include, but are not limited to, district and school newsletters, web sites, social media, electronic communications, mailings, notices sent home with students, recorded telephone messages for parent/guardian information, community forums and public events, news releases, meetings with education reporters and editorial boards, presentations at parent organization meetings, and meetings with representatives of local governments, community organizations, and businesses.

(cf. 0510 - School Accountability Report Card)

(cf. 1113 - District and School Web Sites)

(cf. 1114 - District-Sponsored Social Media)

(cf. 1400 - Relations Between Other Governmental Agencies and the Schools)

(cf. 1700 - Relations Between Private Industry and the Schools)

Communication With The Public (continued)

In developing communications strategies, the Superintendent or designee shall take into account the needs of all members of the public, including individuals with disabilities and those whose primary language is not English.

(cf. 0410 - Nondiscrimination in District Programs and Activities)

The Superintendent or designee may provide staff members with professional development to assist them in effectively responding to requests for information or assistance by parents/guardians or members of the public.

(cf. 4131 - Staff Development)

(cf. 4231 - Staff Development)

(cf. 4331 - Staff Development)

The Superintendent or designee shall provide multiple avenues and opportunities for members of the public to give input on district and school issues and operations. Community members are encouraged to become involved in school activities, participate on district and school committees, provide input at Board meetings, submit suggestions to district staff, and use the district's complaint procedures as appropriate.

(cf. 0460 - Local Control and Accountability Plan)

(cf. 1220 - Citizen Advisory Committees)

(cf. 1230 - School-Connected Organizations)

(cf. 1240 - Volunteer Assistance)

(cf. 1250 - Visitors/Outsiders)

(cf. 1260 - Educational Foundation)

(cf. 1312.1 - Complaints Concerning District Employees)

(cf. 1312.2 - Complaints Concerning Instructional Materials)

(cf. 1312.3 - Uniform Complaint Procedures)

(cf. 1312.4 - Williams Uniform Complaint Procedures)

(cf. 3555 - Nutrition Program Compliance)

(cf. 6020 - Parent Involvement)

(cf. 9322 - Agenda/Meeting Materials)

(cf. 9323 - Meeting Conduct)

Mass Mailings at Public Expense

Newsletters or mass mailings regarding ballot measures, candidates, legislative activities, or any other campaign activities shall be sent and distributed in accordance with law and Board policy.

(cf. 1160 - Political Processes)

Communication With The Public (continued)

A mass mailing is prohibited if all of the following criteria are met: (Government Code 89001-89002)

1. The mailing involves sending a tangible item, such as a videotape, record, button, or written document, which is delivered by any means to recipients at their residence, place of employment or business, or post office box.
2. The item features a Board member or includes the name, office, photograph, or other reference to a Board member and is prepared or sent in cooperation, consultation, coordination, or concert with the Board member.
3. The costs of distribution, or any costs of design, production, and printing exceeding \$50, are paid with district funds.
4. More than 200 substantially similar items, as defined in Government Code 89002, are sent in a single calendar month.

The above prohibition does not apply to the types of mass mailings specified in Government Code 89002(b), including, but not limited to: (Government Code 89002)

1. An item in which the Board member's name appears only in a roster containing the names of all Board members or in the letterhead or logotype of the stationery, forms, and envelopes of the district, a district committee, or the Board member
2. An announcement including only a single mention of the Board member's name which concerns a public meeting related to the Board member's duties or any official district event(s) for which the district is providing the use of its facilities, staff, or other financial support
3. A business card that contains only one mention of the Board member's name and no photograph of the Board member

However, any of the excepted mailings listed in items #1-3 above that meets the criteria for prohibited mass mailings shall not be sent within 60 days preceding an election in which a Board member to whom the mailing relates will appear on the ballot as a candidate. (Government Code 89003)

Comprehensive Communications Plan

The Superintendent or designee shall develop a written communications plan which establishes priorities for proactive community outreach to build support for district programs and issues.

Communication With The Public (continued)

The plan shall identify specific communications goals aligned with the district's vision and goals for student learning. For each communications goal, the plan shall identify key messages, individuals or groups that can help the district achieve its goal, strategies tailored to each target audience, timelines, persons responsible for each activity, and budget implications.

(cf. 0000 - Vision)

(cf. 0200 - Goals for the School District)

As appropriate for each issue, target audiences may include parents/guardians, the media, local governmental agencies, businesses, community organizations and civic groups, postsecondary institutions, health care professionals, child care providers, community leaders, state or federal legislators or agencies, and/or other segments of the public.

The plan shall incorporate strategies for effective communications during a crisis or other emergency situation that may arise.

(cf. 0450 - Comprehensive Safety Plan)

(cf. 3516 - Emergencies and Disaster Preparedness Plan)

The Superintendent or designee shall periodically evaluate the implementation and effectiveness of the district's communications plan and recommend to the Board whether the goals and key issues identified in the plan need to be revised to meet changing circumstances or priorities.

Legal Reference:

EDUCATION CODE

7054 Use of district property or funds re: ballot measures and candidates

35145.5 Board meetings, public participation

35172 Promotional activities

38130-38138 Civic Center Act

48980-48985 Parental notifications

GOVERNMENT CODE

54957.5 Meeting agendas and materials

82041.5 Mass mailing

89001-89003 Newsletter or mass mailing

CODE OF REGULATIONS, TITLE 2

18901.1 Campaign-related mailings sent at public expense

CODE OF FEDERAL REGULATIONS, TITLE 28

35.101-35.190 Americans with Disabilities Act

Communication With The Public (continued)

Management Resources:

WEB SITES

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

California School Public Relations Association: <http://www.calspra.org>

Fair Political Practices Commission: <http://www.fppc.ca.gov>

(3/08 3/11) 10/18

Policy
Updated:

SUNNYSIDE UNION ELEMENTARY SCHOOL DISTRICT
Strathmore, California

Instruction

BP 6173.2(a)

Education Of Children Of Military Families

The Governing Board recognizes that children of military families face challenges to their academic success caused by the frequent moves or deployments of their parents/guardians in fulfillment of military service. The district shall provide such students with academic resources, services, and opportunities for extracurricular and enrichment activities that are available to all district students.

(cf. 5125 - Student Records)
(cf. 6011 - Academic Standards)
(cf. 6145 - Extracurricular and Cocurricular Activities)
(cf. 6145.2 - Athletic Competition)
(cf. 6179 - Supplemental Instruction)

The Superintendent or designee may waive district policies or rules when necessary to facilitate the enrollment, placement, advancement, eligibility for extracurricular activities, or on-time graduation of children of military families, in accordance with the Interstate Compact on Educational Opportunity for Military Children as ratified in Education Code 49700-49704.

(cf. 5117 - Interdistrict Attendance)
(cf. 6146.1 - High School Graduation Requirements)
(cf. 6146.3 - Reciprocity of Academic Credit)

The Superintendent or designee shall provide information and/or training to administrators, other appropriate district staff, and military families regarding the provisions of the Interstate Compact and the educational rights of children of military families.

(cf. 4131 - Staff Development)
(cf. 4231 - Staff Development)
(cf. 4331 - Staff Development)
(cf. 5020 - Parent Rights and Responsibilities)

The Superintendent or designee shall collaborate with parents/guardians, school liaison officers from military installations, and/or other agencies within and outside the state to facilitate the transition of children of military families into and out of the district.

(cf. 1020 - Youth Services)
(cf. 1400 - Relations Between Other Governmental Agencies and the Schools)
(cf. 6020 - Parent Involvement)

The Superintendent or designee shall annually report to the Board and the public on the educational outcomes of children of military families. Such reports may include, but are not limited to, school attendance, student achievement test results, promotion and retention rates by grade levels, and graduation rates.

Education Of Children Of Military Families (continued)

(cf. 0500 - Accountability)
(cf. 5123 - Promotion/Acceleration/Retention)
(cf. 6162.51 - State Academic Achievement Tests)

Legal Reference:

EDUCATION CODE

35160.5 District policy rules and regulations; requirements; matters subject to regulation
35179 Interscholastic athletics; associations or consortia
35181 Students' responsibilities
35351 Assignment of students to particular schools
46600-46611 Interdistrict attendance agreements
48050-48054 Nonresidents
48200-48208 Persons included (compulsory education law)
48300-48316 Student attendance alternatives, school district of choice program
49700-49704 Education of children of military families
51225.2 Course credits

51225.3 Requirements for graduation

51240-51246 Exemptions from requirements

51250-51251 School-age military dependents

66204 Certification of high school courses as meeting university admissions criteria

CODE OF REGULATIONS, TITLE 5

4600-4670 Uniform complaint procedures

UNITED STATES CODE, TITLE 10

101 Definitions

1209 Transfer to inactive status list instead of separation

1211 Members on temporary disability retired list: return to active duty; promotion

UNITED STATES CODE, TITLE 20

1400-1482 Individuals with Disabilities Education Act

6311 State plan

UNITED STATES CODE, TITLE 29

794 Section 504 of the federal Rehabilitation Act

Management Resources:

CALIFORNIA CHILD WELFARE COUNCIL

Partial Credit Model Policy and Practice Recommendations

CALIFORNIA DEPARTMENT OF EDUCATION PUBLICATIONS

Final Report to the Legislature on the Interstate Compact on Educational Opportunity for Military Children, April 2014

Education Of Children Of Military Families (continued)

WEB SITES

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

California Child Welfare Council: <http://www.chhs.ca.gov/Pages/CACildWelfareCouncil.aspx>

California Department of Education, Educational Options Office: <http://www.cde.ca.gov/ls/pf/mc>

Military Interstate Children's Compact Commission: <http://www.mic3.net>

(11/09) 10/17

Policy
Updated:

SUNNYSIDE UNION ELEMENTARY SCHOOL DISTRICT
Strathmore, California

Instruction

AR 6173.2(a)

Education Of Children Of Military Families

Definitions

Children of military families are school-aged children in the household of: (Education Code 49701)

1. Members who are in full-time duty status in the active uniformed service of the United States, including any member of the National Guard and Reserve on active duty order pursuant to 10 USC 1209 or 1211
2. Members or veterans of the uniformed services who are severely injured and medically discharged or retired, for one year after their medical discharge or retirement
3. Members of the uniformed services who have died while on active duty or as a result of injuries sustained on active duty, for one year after their death

Enrollment and Residency

The Superintendent or designee shall facilitate the enrollment of children of military families and ensure that they are not placed at a disadvantage due to difficulty in the transfer of their records from previous school districts and/or variations in entrance or age requirements. (Education Code 49701)

A child of a military family shall be deemed to meet district residency requirements if the parent/guardian, while on active military duty pursuant to an official military order, is transferred or is pending transfer to a military installation within the state. The Superintendent or designee shall accept electronic submission of such a student's application for enrollment, including enrollment in a specific school or program within the district, and for course registration. (Education Code 48204.3)

(cf. 5111.1 - District Residency)

When a child of a military family is transferring into the district, the Superintendent or designee shall enroll the student based on unofficial education records, if official records are not yet available. Upon enrollment, the Superintendent or designee shall immediately request the student's official records from the student's previous district. The Superintendent or designee shall allow the student 30 days from the date of enrollment to obtain all required immunizations. (Education Code 49701)

Education Of Children Of Military Families (continued)

(cf. 5111 - Admission)

(cf. 5125 - Student Records)

(cf. 5141- Health Care and Emergencies)

(cf. 5141.31- Immunizations)

A child of a military family shall be allowed to continue attending the school of origin, regardless of any change of residence of the family during that school year, for the duration of the student's status as a child of a military family. (Education Code 48204.6)

To provide a child of a military family the benefit of matriculating with peers in accordance with the established feeder patterns of the district, the following shall apply: (Education Code 48204.6)

1. If the student is transitioning between grade levels, the student shall be allowed to continue in the school district of origin in the same school attendance areas.
2. If the student is transitioning to a high school and the school designated for matriculation is in another district, the student shall be allowed to continue to the school designated for matriculation in that school district.

The principal or designee of the new school shall ensure that the student is immediately enrolled even if the student has outstanding fees, fines, textbooks, or other items or moneys due to the school last attended or is unable to produce clothing or records normally required for enrollment, such as previous academic records, medical records, including, but not limited to, records or other proof of immunization history pursuant to Health and Safety Code 120325-120480, proof of residency, other documentation, or school uniforms. (Education Code 48204.6)

If the student's status changes during a school year due to the end of military service of the student's parent/guardian, the following shall apply: (Education Code 48204.6)

1. If the student is in grades K-8, the student shall be allowed to continue attending the school of origin through the duration of that academic school year.
2. If the student is in high school, the student shall be allowed to continue attending the school of origin through graduation.

A child of an active military duty parent/guardian shall not be prohibited from transferring out of the district, if the school district of proposed enrollment approves the application for transfer. (Education Code 46600, 48307)

(cf. 5117 - Interdistrict Attendance)

Education Of Children Of Military Families (continued)

When a child of a military family is transferring out of the district, the Superintendent or designee shall provide the student's parents/guardians with a complete set of the student's records or, if the official student record cannot be released, an unofficial or "hand-carried" record. Upon request from the new district, the Superintendent or designee shall provide a copy of the student's record to the new district within 10 days. (Education Code 49701)

Transportation

The Superintendent or designee may, but is not required to, provide transportation to enable a child of a military family to attend the school of origin or to matriculate to a feeder school as described above, except when indicated in the individualized education program (IEP) of a student with a disability or otherwise required by federal law. (Education Code 48204.6)

Placement

Whenever a student's parent/guardian is serving on active duty or has been discharged from military service within the last year and the student transfers to a new school as the direct result of the military transfer or discharge, the Superintendent or designee may, prior to the receipt of official transcript(s) or the arrival of the student, review the student's coursework to date, including any unofficial transcript(s), to determine the appropriate placement of the student in classes. The evaluation shall also include communication with school counselors and teachers at the former school by videoconferencing, email, and/or telephone calls. (Education Code 51251)

The Superintendent or designee shall initially honor the placement of any child of a military family in educational courses and programs based on the student's enrollment and/or assessment in the previous school. The Superintendent or designee may, to the extent permitted by Board policy, waive course or program prerequisites, preconditions, and/or application deadlines when making decisions regarding placement of children of military families and their eligibility for extracurricular academic, athletic, and social activities. (Education Code 49701)

(cf. 6141.5 - Advanced Placement)

(cf. 6145 - Extracurricular and Cocurricular Activities)

(cf. 6145.2 - Athletic Competition)

(cf. 6172 - Gifted and Talented Student Program)

(cf. 6174 - Education for English Learners)

When a child of a military family transferring into the district has been identified as an individual with a disability pursuant to 20 USC 1400-1482, the Superintendent or designee shall provide comparable services based on the student's current IEP.

Education Of Children Of Military Families (continued)

In addition, when the child of a military family transferring into the district is eligible for services under Section 504 of the federal Rehabilitation Act, the Superintendent or designee shall make reasonable accommodations and modifications to address the needs of the student subject to the student's existing Section 504 plan. The district may authorize subsequent evaluations of the student to ensure appropriate placement. (Education Code 49701)

(cf. 6159 - Individualized Education Program)

(cf. 6164.4 - Identification and Evaluation of Individuals for Special Education)

(cf. 6164.6 - Identification and Education Under Section 504)

Absences

When a student's parent/guardian is an active duty member and is called to duty for, is on leave from, or is immediately returned from deployment to a combat zone or to combat support posting, the Superintendent or designee may grant additional excused absences to the student to visit with the parent/guardian. (Education Code 49701)

(cf. 5113 - Absences and Excuses)

To determine whether a child of a military family is in the third or fourth year of high school, the district shall use either the number of credits earned as of the date of the transfer or the length of school enrollment, whichever qualifies the student for the exemption. (Education Code 51225.1)

Notification and Complaints

Information regarding the educational rights of children of military families, as specified in Education Code 51225.1 and 51225.2, shall be included in the annual uniform complaint procedures notification distributed to students, parents/guardians, employees, and other interested parties pursuant to 5 CCR 4622. (Education Code 51225.1, 51225.2)

Any complaint alleging that the district has not complied with requirements regarding the education of children of military families, as specified in Education Code 51225.1 or 51225.2, may be filed in accordance with the district's procedures in AR 1312.3 - Uniform Complaint Procedures.

(cf. 1312.3 - Uniform Complaint Procedures)

(3/16 10/17) 12/18

Regulation
Updated:

SUNNYSIDE UNION ELEMENTARY SCHOOL DISTRICT
Strathmore, California

Instruction

AR 6183(a)

Home And Hospital Instruction

A student with a temporary disability which makes school attendance impossible or inadvisable shall be entitled to receive individual instruction at home or in a hospital or other residential health facility, excluding state hospitals. (Education Code 48206.3)

(cf. 5112.2 - Exclusions from Attendance)

Temporary disability means a physical, mental, or emotional disability incurred while a student is enrolled in regular day classes or an alternative education program, and after which the student can reasonably be expected to return to regular day classes or the alternative education program in which the student is enrolled. Temporary disability does not include a disability that would qualify a student for special education pursuant to Education Code 56026. (Education Code 48206.3)

(cf. 5141.22 - Infectious Diseases)

(cf. 6158 - Independent Study)

(cf. 6164.4 - Identification and Evaluation of Individuals for Special Education)

At the beginning of the school year, the Superintendent or designee shall notify parents/guardians of district students regarding: (Education Code 48206.3, 48208, 48980)

1. The availability of individual instruction for any student with a temporary disability, including information regarding student eligibility for, and the duration of, individual instruction
2. The rights and responsibilities of parents/guardians of any student with a temporary disability pursuant to Education Code 48207 and 48208

(cf. 5145.6 - Parental Notifications)

Parents/guardians shall notify the principal or designee when their child is temporarily disabled and needs individual instruction at home or in a hospital or other residential health facility.

Determination of Student Eligibility

Not later than five working days after receiving notification from a parent/guardian that a student has a temporary disability, the Superintendent or designee shall determine whether the student will be able to receive individual instruction at home or in a hospital or residential health facility. (Education Code 48208)

The Superintendent or designee may require verification through any reasonable means that the student is temporarily disabled and needs individual instruction.

Home And Hospital Instruction (continued)

Provision of Individual Instruction

Individual instruction at a student's home or in a hospital or other residential health facility shall begin no later than five working days after the Superintendent or designee makes the determination that the student is eligible to receive individual instruction. (Education Code 48207.5, 48208)

The district shall be responsible for providing individual instruction to any temporarily disabled student who is in a hospital or other residential health facility located within district boundaries, whether or not the student is enrolled in the district. If the student is enrolled in another district, the Superintendent or designee may enter into an agreement to have the student's district of residence provide the individual instruction. The Superintendent or designee may also enter into an agreement to provide individual instruction to a district student who is in a hospital or other residential health facility located within the boundaries of another district. (Education Code 48208)

(cf. 5111.1 - District Residency)

Whenever the district provides individual instruction to a non-district student who is in a hospital or other residential health facility located within district boundaries, the Superintendent or designee shall, within five working days of the beginning of the individual instruction, provide written notification to the student's district of residence that, effective on the date on which individual instruction began, the district of residence may not count the student for purposes of computing that district's average daily attendance. (Education Code 48208)

A student receiving individual instruction in a hospital or residential health facility for a partial week shall be entitled to attend school or receive individual instruction at home on days in which the student is not receiving individual instruction in the hospital or other residential health facility, if the student is well enough to do so. (Education Code 48207.3)

Home or hospital instruction shall be provided only by teachers with valid California teaching credentials who consent to the assignment. (Education Code 44865)

(cf. 4112.2 - Certification)

(cf. 4113 - Assignment)

Insofar as possible, the teacher providing home or hospital instruction shall consult with the student's current classroom teacher(s) so as to provide a continuity of instruction that enables the student to stay abreast with the regular school program.

Home And Hospital Instruction (continued)

The district's attendance supervisor shall ensure that the absences of any temporarily disabled student receiving individual instruction at home or in a hospital or other residential health facility are excused until the student is able to return to the regular school program. (Education Code 48240)

(cf. 5113 - Absences and Excuses)

(cf. 5113.11 - Attendance Supervision)

Return to School

A student receiving individual instruction who is well enough to return to school shall be allowed to return to the school that the student attended immediately before receiving individual instruction, if the return occurs during the school year in which the individual instruction was initiated. (Education Code 48207.3)

Legal Reference:

EDUCATION CODE

44865 Qualifications for home teachers

45031 Home teachers

48200 Minimum school day

48206.3-48208 Students with temporary disabilities; individual instruction

48240 Supervisors of attendance

48980 Parental notifications

51800-51802 Employment of home teachers

56026 Individual with exceptional needs

CODE OF REGULATIONS, TITLE 5

421 Method of verification

423 Prolonged illness

(6/89 10/98) 12/18

Regulation

Updated:

SUNNYSIDE UNION ELEMENTARY SCHOOL DISTRICT

Strathmore, California

Home & Hospital Referral

COMPLETED PACKET IS TO BE RETURNED TO THE STUDENT'S HOME SCHOOL FOR COMMITTEE TO REVIEW ELIGIBILITY.

Section 1 – To be completed by REFERRING SCHOOL

Name of Student _____ Date of Birth _____ Grade _____

Start Date _____ End Date _____ Full Day _____ Partial Day _____

Special services the student receives: 504 Plan _____ Special Education _____ GATE _____ Other _____

If the student is on an active IEP or 504, **a transition meeting must be scheduled and held before the student transfers.**

Is the student on a SARB contract? Yes _____ No _____ Referral to: SARB _____ D.A. _____

Section II – PARENT/GUARDIAN FORM to be completed by the parent/guardian.

Full Name of Father/Guardian _____ Work Phone _____

Full Name of Mother/Guardian _____ Work Phone _____

Telephone numbers – Home _____ Cell _____

Address _____ City/Zip Code _____

Email Address _____

Release of Information

I understand that the Home & Hospital Review Committee may request a review of the information provided on these forms by local health personnel. I give my permission for the treating medical personnel, Sunnyside Union School nurse, and Sunnyside Union School psychologist to have access to pertinent information regarding this request.

Signature of Parent _____ Date _____

If the student is to be out of school for 20 days or fewer, parents may opt to have a Short-Term Independent Study contract through the student's home school instead of Home & Hospital service.

EDUCATION CODE INFORMATION

The purpose of home and hospital instruction is to help students maintain continuity of instruction during a period of **temporary disability**. **"Temporary disability"** means a physical, mental, or emotional disability incurred while a student is enrolled in regular day classes or alternative education program and **after which a student can reasonably be expected to return to regular day classes or an alternative educational program without special interventions.** (CA Education Code Sections 48206.3)

EC Section 48206.3 specifies each hour of individualized instruction counts as one day of attendance.

Home & Hospital Referral

Section III – PHYSICIAN STATEMENT – To be completed by the physician.

The purpose of home and hospital instruction is to help students maintain continuity of instruction during a period of **temporary disability**. “**Temporary disability**” means a physical, mental, or emotional disability incurred while a student is enrolled in regular day classes or alternative education program and **after which a student can reasonably be expected to return to regular day classes or an alternative educational program without special interventions.**” (CA Education Code Sections 48206.3)

Name of Student _____ Birthdate _____

Home School Sunnyside Union School Grade _____

Additional Physician Information: Please note that this information must be reviewed; therefore, Sunnyside Union School District nurses and psychologists might be in contact to acquire additional information as needed (see medical release on page one).

1. Specific reason(s) why student is unable to attend school at this time _____

2. Is this condition *temporary* _____ OR *chronic* _____?

3. Is the condition contagious? YES _____ NO _____

4. Is the student/patient expected to be out of school for a period of 2 weeks or more (10 school days or more)? YES _____ NO _____

5. What is the estimated date the student/patient is expected to return to campus? _____

6. Is the student/patient able to meet with a teacher one-on-one at the school setting? YES _____
NO _____

If YES, is the student also able to take academic examinations at the school setting for a period of up to four-five hours (including breaks as needed)? YES _____ NO _____

7. In which P.E. program will the student/patient participate:

Regular _____ Adaptive _____ Waiver P.E. _____

8. Is the student able to attend school for _____ 1 hour _____ 2 hours per day?

Home & Hospital Referral

Please note that this form must be signed by an M.D.

Physician's name _____

Physician's signature _____ Date _____

Office/Specially _____

Address _____

City _____ Zip _____

Phone Number (_____) _____ Fax Number (_____) _____

Will you be treating and/or following the progress of the patient? YES _____ NO _____

*If **another** physician will be treating and/or following the progress of this patient, please give **his/her** contact information:

Physician's Name _____

Address _____ City _____ Zip _____

Phone Number (_____) _____ Fax Number (_____) _____

Home & Hospital Referral

Section IV – HOME/HOSPITAL REVIEW COMMITTEE FORM

Name of Student _____

Date Application Received _____ Approved _____ Denied _____ Incomplete _____

If approved, date of services will be from _____ until review date _____

If eligibility for services has been denied, reason for denial _____

Date of Request _____ Person Contacted _____

Phone Number (_____) _____ Cell Number (_____) _____

Signatures of Committee Members

Vice Principal _____ Date _____

Teacher _____ Date _____

Superintendent-Principal _____ Date _____

Additional Personnel

Special Education Teacher _____ Date _____

Psychologist _____ Date _____

School Nurse _____ Date _____

OT/PT _____ Date _____

Additional Comments _____

Home & Hospital Referral

Notes:

Home & Hospital Referral

Section V – DOCTOR'S EARLY RELEASE FROM HOME AND HOSPITAL INSTRUCTION

This form must be **completed and signed by the physician** and given to the parent **before** the student will be readmitted to class.

Please readmit _____ to his/her regular school or classroom setting, effective _____.

My recommendations for this student are:

Regular School Program _____

Shortened School Day _____

Restricted activities? YES _____ NO ____ If YES, please explain _____

Other _____

The recommendations stated above will be followed until further communication from the physician has been received.

Physician's Signature _____ Date _____

Physician's Name (please print) _____

Address _____

City _____ Zip _____

Phone Number (_____) _____ Fax Number (_____) _____

Exhibit
Updated:

SUNNYSIDE UNION ELEMENTARY SCHOOL DISTRICT
Strathmore, California

Board Bylaws

BB 9322(a)

Agenda/Meeting Materials

Agenda Content

Governing Board meeting agendas shall reflect the district's vision and goals and the Board's focus on student learning.

(cf. 0000 - Vision)

(cf. 0200 - Goals for the School District)

Each agenda shall state the meeting time and place and shall briefly describe each business item to be transacted or discussed, including items to be discussed in closed session. (Government Code 54954.2)

(cf. 9320 - Meetings and Notices)

(cf. 9321- Closed Session Purposes and Agendas)

The agenda shall provide members of the public the opportunity to address the Board on any agenda item before or during the Board's consideration of the item. However, the agenda need not provide an opportunity for public comment when the agenda item has previously been considered at an open meeting of a committee comprised exclusively of Board members, provided that members of the public were afforded an opportunity to comment on the item at that meeting and that the item has not been substantially changed since the committee considered it. (Government Code 54954.3)

The agenda for a regular Board meeting shall also provide members of the public an opportunity to provide comment on matters which are not on the agenda but which are within the subject matter jurisdiction of the Board. (Education Code 35145.5; Government Code 54954.3)

(cf. 9323 - Meeting Conduct)

Each agenda for a regular meeting shall list the address designated by the Superintendent or designee for public inspection of documents related to an open session item that have been distributed to the Board less than 72 hours before the meeting. (Government Code 54957.5)

The agenda shall include information regarding how, when, and to whom a request should be made if an individual requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting. (Government Code 54954.2)

Agenda/Meeting Materials (continued)

Agenda Preparation

The Board president and the Superintendent, as secretary to the Board, shall work together to develop the agenda for each regular and special meeting.

(cf. 9121 - President)

(cf. 9122 - Secretary)

Any Board member or member of the public may request that a matter within the jurisdiction of the Board be placed on the agenda of a regular meeting. The request shall be submitted in writing to the Superintendent or designee with supporting documents and information, if any, at least one week before the scheduled meeting date. Items submitted less than a week before the scheduled meeting date may be postponed to a later meeting in order to allow sufficient time for consideration and research of the issue.

The Board president and Superintendent shall decide whether a request from a member of the public is within the subject matter jurisdiction of the Board. Items not within the subject matter jurisdiction of the Board may not be placed on the agenda. In addition, before placing the item on the agenda, the Board president and Superintendent shall determine if the item is merely a request for information or whether the issue is covered by an existing policy or administrative regulation.

If the Board president and Superintendent deny a request from a Board member to place an item on the agenda, the Board member may request the Board to take action to determine whether the item shall be placed on the agenda.

The Board president and Superintendent shall also decide whether an agenda item is appropriate for discussion in open or closed session, and whether the item should be an action item subject to Board vote or an information item that does not require immediate action.

In order to promote efficient meetings, the Board may bundle a number of items and act upon them together by a single vote through the use of a consent agenda. Consent items shall be items of a routine nature and items for which Board discussion is not anticipated and for which the Superintendent recommends approval. When any Board member requests the removal of an item from the consent agenda, the item shall be removed and given individual consideration for action as a regular agenda item.

The agenda shall provide an opportunity for members of the public to comment on any consent agenda item that has not been previously considered. (Government Code 54954.3)

Agenda/Meeting Materials (continued)

Any Board action that involves borrowing \$100,000 or more shall be discussed, considered, and deliberated upon as a separate item of business on the meeting agenda. (Government Code 53635.7)

(cf. 9323.2 - Actions by the Board)

All public communications with the Board are subject to requirements of relevant Board policies and administrative regulations.

(cf. 1312.1 - Complaints Concerning District Employees)

(cf. 1312.2 - Complaints Concerning Instructional Materials)

(cf. 1312.3 - Uniform Complaint Procedures)

(cf. 1312.4 - Williams Uniform Complaint Procedures)

(cf. 3320 - Claims and Actions Against the District)

(cf. 5144.1 - Suspension and Expulsion/Due Process)

Agenda Dissemination to Board Members

At least 72 hours before each regular meeting, each Board member shall be provided a copy of the agenda and agenda packet, including the Superintendent or designee's report; minutes to be approved; copies of communications; reports from committees, staff, and others; and other available documents pertinent to the meeting.

When special meetings are called, Board members shall receive, at least 24 hours prior to the meeting, notice of the business to be transacted. (Government Code 54956)

Board members shall review agenda materials before each meeting. Individual members may confer directly with the Superintendent or designee to ask questions and/or request additional information on agenda items. However, a majority of Board members shall not, outside of a noticed meeting, directly or through intermediaries or electronic means discuss, deliberate, or take action on any matter within the subject matter jurisdiction of the Board.

(cf. 9012 - Board Member Electronic Communications)

Agenda Dissemination to Members of the Public

Any agenda and related materials distributed to the Board shall be made available to the public upon request without delay. Only those documents which are disclosable public records under the Public Records Act and which relate to an agenda item scheduled for the open session portion of a regular meeting shall be made available to the public. (Government Code 54957.5)

Agenda/Meeting Materials (continued)

At least 72 hours prior to a regular meeting, the agenda shall be posted at one or more locations freely accessible to members of the public. (Government Code 54954.2)

In addition, the Superintendent or designee shall post the agenda on the homepage of the district web site. The posted agenda shall be accessible through a prominent direct link to the current agenda or to the district's agenda management platform in accordance with Government Code 54954.2. When the district utilizes an integrated agenda management platform, the link to that platform shall take the user directly to the web site with the district's agendas, and the current agenda shall be the first available. (Government Code 54954.2)

(cf. 1113 - District and School Web Sites)

(cf. 1340 - Access to District Records)

If a document which relates to an open session agenda item of a regular Board meeting is distributed to the Board less than 72 hours prior to a meeting, the Superintendent or designee shall make the document available for public inspection at a designated location at the same time the document is distributed to all or a majority of the Board. (Government Code 54957.5)

The Superintendent or designee shall mail a copy of the agenda or a copy of all the documents constituting the agenda packet to any person who requests the items. The materials shall be mailed at the time the agenda is posted or upon distribution of the agenda to a majority of the Board, whichever occurs first. (Government Code 54954.1)

Any request for mailed copies of agendas or agenda packets shall be in writing and shall be valid for the calendar year in which it is filed. Written requests must be renewed following January 1 of each year. (Government Code 54954.1)

Persons requesting mailing of the agenda or agenda packet shall pay an annual fee, as determined by the Superintendent or designee, not to exceed the cost of providing the service.

Any document prepared by the district or Board and distributed during a public meeting shall be made available for public inspection at the meeting. Any document prepared by another person shall be made available for public inspection after the meeting. These requirements shall not apply to a document that is exempt from public disclosure under the Public Records Act. (Government Code 54957.5)

Upon request, the Superintendent or designee shall make the agenda, agenda packet, and/or any writings distributed at the meeting available in appropriate alternative formats to persons with a disability, as required by the Americans with Disabilities Act. (Government Code 54954.1)

Agenda/Meeting Materials (continued)

Legal Reference:

EDUCATION CODE

35144 *Special meetings*

35145 *Public meetings*

35145.5 *Right of public to place matters on agenda*

GOVERNMENT CODE

6250-6270 *Public Records Act*

53635.7 *Separate item of business*

54954.1 *Mailed agenda of meeting*

54954.2 *Agenda posting requirements; board actions*

54954.3 *Opportunity for public to address legislative body*

54954.5 *Closed session item descriptions*

54956.5 *Emergency meetings*

54957.5 *Availability of public records*

54960.2 *Challenging board actions; cease and desist*

UNITED STATES CODE, TITLE 42

12101-12213 *Americans with Disabilities Act*

CODE OF FEDERAL REGULATIONS, TITLE 28

35.160 *Effective communications*

36.303 *Auxiliary aids and services*

COURT DECISIONS

Mooney v. Garcia, (2012) 207 Cal.App.4th 229

Caldwell v. Roseville Joint Union High School District, 2007 U.S. Dist. LEXIS 66318

ATTORNEY GENERAL OPINIONS

99 Ops. Cal. Atty. Gen. 11 (2016)

78 Ops. Cal. Atty. Gen. 327 (1995)

Management Resources:

CSBA PUBLICATIONS

Call to Order: A Blueprint for Great Board Meetings, 2015

The Brown Act: School Boards and Open Meeting Laws, rev. 2014

ATTORNEY GENERAL PUBLICATIONS

The Brown Act: Open Meetings for Legislative Bodies, rev. 2003

WEB SITES

CSBA, Agenda Online: <http://www.csba.org>

California Attorney General's Office: <http://www.oag.ca.gov>

(3/08 11/12) 12/18

Bylaws

Updated:

SUNNYSIDE UNION ELEMENTARY SCHOOL DISTRICT
Strathmore, California

Board Bylaws

BB 9324(a)

Minutes And Recordings

The Governing Board recognizes that maintaining accurate minutes of Board meetings helps foster public trust in Board governance and provides a record of Board actions for use by district staff and the public.

(cf. 9000 - Role of the Board)

(cf. 9005 - Governance Standards)

(cf. 9323 - Meeting Conduct)

The secretary of the Board shall keep minutes and record all official Board actions. The Board's minutes shall be public records and shall be made available to the public upon request.
(Education Code 35145, 35163)

(cf. 1340 - Access to District Records)

(cf. 9122 - Secretary)

(cf. 9323.2 - Actions by the Board)

The minutes of Board meetings shall include, but not be limited to:

1. A notation of which Board members are present, in person or by teleconference, and whether a member is not present for part of the meeting due to late arrival and/or early departure

(cf. 9250 - Remuneration, Reimbursement and Other Benefits)

(cf. 9320 - Meetings and Notices)

2. A brief summary of the Board's discussion on each agenda topic, rather than a verbatim record of each Board member's specific points of view during the discussion

3. A summary of the public comments made on agendized items and unagendized topics

4. The specific language of each motion and the names of the Board members who made and seconded the motion

5. Any action taken by the Board, and the vote or abstention on that action of each Board member present (Education Code 35145; Government Code 54953)

Upon request by a student's parent/guardian, or by the student if age 18 or older, the minutes shall not include the student's or parent/guardian's address, telephone number, date of birth, or email address, or the student's name or other directory information as defined in Education Code 49061. The request to exclude such information shall be made in writing to the secretary or clerk of the Board. (Education Code 49073.2)

Minutes And Recordings (continued)

(cf. 5125.1 - Release of Directory Information)

The Board agenda shall include a statement of the option and process for students and parents/guardians to request that such information be excluded from the minutes.

The Superintendent or designee shall distribute a copy of the "unapproved" minutes of the previous meeting(s) with the agenda for the next regular meeting. The Board shall approve the minutes as circulated or with necessary amendments.

Upon approval by the Board, the minutes shall be signed by the board clerk.

Official Board minutes and recordings shall be stored in a secure location and shall be retained in accordance with law.

(cf. 3580 - District Records)

Any minutes or recordings kept for Board meetings held in closed session shall be kept separately from the minutes or recordings of regular and special meetings. Minutes or recordings of closed sessions are not public records. (Government Code 54957.2)

(cf. 9321.1 - Closed Session Actions and Reports)

Recording or Broadcasting of Meetings

The district may tape, film, stream, or broadcast any open Board meeting. At the beginning of the meeting, the Board president shall announce that a recording or broadcasting is being made at the direction of the Board and that the recording or broadcast may capture images and sounds of those attending the meeting. As practicable, the recorder or camera shall be placed in plain view of meeting participants.

Any district recording may be erased or destroyed 30 days after the meeting. Recordings made at the direction of the Board during a meeting are public records and, upon request, shall be made available for inspection by members of the public on district equipment without charge. (Government Code 54953.5)

Minutes And Recordings (continued)

Legal Reference:

EDUCATION CODE

35012 *Number of members; terms; student board members*

35145 *Public meetings*

35163 *Official actions, minutes and journals*

35164 *Vote requirements*

49061 *Student records; definitions*

49073.2 *Privacy of student and parent/guardian personal information*

GOVERNMENT CODE

54952.2 *Meeting defined*

54953 *Meetings*

54953.5 *Audio or video recording of proceedings*

54953.6 *Broadcasting of proceedings*

54957.2 *Closed sessions; clerk; minute book*

54960 *Violations and remedies*

PENAL CODE

632 *Unlawful to intentionally record a confidential communication without consent*

CODE OF REGULATIONS, TITLE 5

16020-16027 *Classification and retention of records*

Management Resources:

CSBA PUBLICATIONS

Call to Order: A Blueprint for Great Board Meetings, 2015

The Brown Act: School Boards and Open Meeting Laws, rev. 2014

WEB SITES

CSBA, Agenda Online: <http://www.agendaonline.com>

(7/08 4/14) 12/18

Bylaws

Updated:

SUNNYSIDE UNION ELEMENTARY SCHOOL DISTRICT

Strathmore, California

Tulare County
Office of Education
Committed to Students, Support & Service

RECEIVED
JAN 22 2020
TULARE COUNTY OFFICE OF EDUCATION

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 14, 2020

Mr. Steve Tsuboi, Superintendent
Sunnyside Union School District
21644 Avenue 196
Strathmore, CA 93267

SUBJECT: REVIEW OF FIRST PERIOD INTERIM REPORT, 2019-20

Dear Steve:

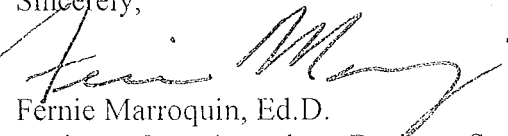
The county office has reviewed the 2019-20 First Period Interim Report of the Sunnyside Union School District, and will be able to certify to the California Department of Education that the district has submitted a positive report for the period ending October 31, 2019.

We find that these documents reflect a satisfactory fiscal position and indicate the district will be able to meet its financial obligations during this fiscal year and the two subsequent years as certified by your governing board. We thank you for the timely filing of your Interim Report with our office. The efforts of your staff in the preparation and submission of this report along with the supporting documentation is appreciated.

Please read our attached addendum for further comments and recommendations.

If you have any concerns or questions about this review, our comments or recommendations, please do not hesitate to call at 733-6474.

Sincerely,


Fernie Marroquin, Ed.D.
Assistant Superintendent, Business Services
Tulare County Office of Education

FM/es
Encls.

cc: Humberto Cardenas, Board President
District Business Manager

BACKGROUND

Our review of the district's 2019-20 First Period Interim Report and the comments included are based on information the district had available at the time the Interim Report was prepared. The enacted 2019-20 State Budget reflects continued increases in funding for California Public Education, while maintaining a healthy state Budget reserve for future economic downturns. Roughly \$2 billion in Prop 98 funding has been dedicated to the statutory COLA of 3.26% which still allows the State to make a first-time deposit of \$389 million into the Public School System Stabilization Account on top of a \$4.3 billion contribution to the Prop 2 Rainy Day Budget Reserve.

The Governor maintains the State's commitment to full funding of the Local Control Funding Formula (LCFF) while introducing many of his own new priorities. The State Budget includes an unprecedented \$3.15 billion, non-Prop 98 contribution for debt payments toward CalSTRS and CalPERS liabilities for school employers. The Governor has also directed funding to Special Education in the form of the Special Education Early Intervention Preschool Grant (\$492.7 million) and SELPA base rate adjustment (\$152 million). These items outlined above significantly improve the near term financial position of California school districts.

However, the Department of Finance's 2019-20 Budget Summary cautions that even a moderate recession could cause State revenues to drop by nearly \$70 billion. The Department of Finance recognizes that the State economy continues to grow but there are signs of slowing. A slowing economy combined with risks unique to California including emergency preparedness costs due to wildfires, affordable housing woes, state-wide declining enrollment and an uncertain relationship with the federal government point to the importance of districts exercising fiscal prudence even when times are good.

Local Control Accountability Plan

Also of note is the growing emphasis on accountability measures as outlined in each district's Local Control Accountability Plan (LCAP). As 2019-20 represents the second year of full funding under the LCFF model, it is expected that districts are meeting their minimum proportionality requirement (MPP) as calculated under Title 5, California Code of Regulations, Section 15496(a). During 2019-20 it is critical that districts not only budget to meet the MPP requirement, but also respond to the performance data released by the California School Dashboard to develop goals and actions that are meeting the needs of each district's diverse student population. Due to the passage of AB1808 in 2018 the LCAP template for 2019-20 incorporates a new section titled "Budget Overview for Parents" which is intended to help stakeholders better understand funding decisions included in the LCAP. This bill takes an additional step towards increasing transparency over those additional supplemental and concentration dollars generated by unduplicated students.

RETIREMENT COSTS

The Governmental Accounting Standards Board Statement No. 68 (GASB 68) reporting requirements took effect for the 2014-15 financial statements for State and local government employers. Districts now need to recognize their proportionate share of the net pension liability (NPL) for both CalSTRS and CalPERS retirees in their accrual based financial statements (Audit Reports).

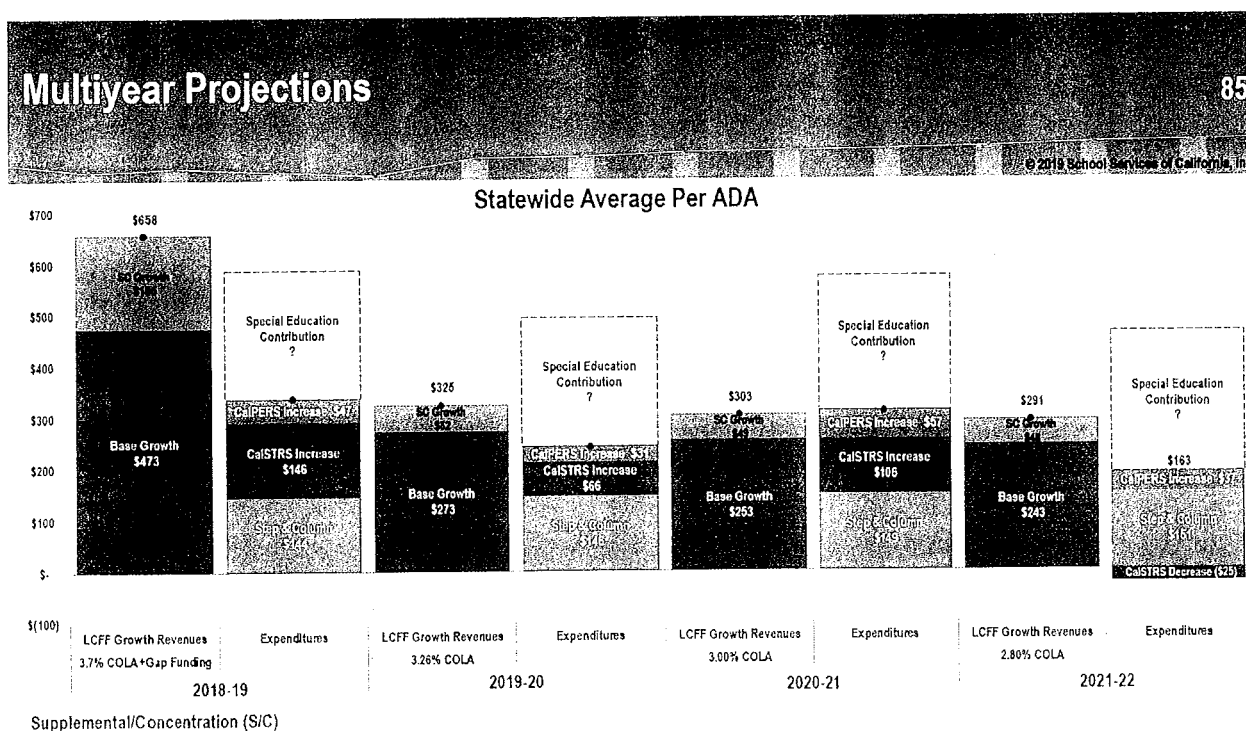
The CalPERS Board adopted changes to the actuarial assumptions that became effective June 30, 2015. The changes result in a projected increase to the employer contribution rates for 2015-16 and for the following five years. The CalPERS Circular Letter 200-012-14 dated March 10, 2014 provided projected rates for 2014-15 through 2020-21 which were subsequently modified as shown below. As previously mentioned, these rates are still subject to change. Both the CalPERS and CalSTRS rates shown for 2019-20 and beyond include the subsidy provided as part of the Governor's Budget Proposal.

CalPERS Actual and Projected Rates						
2015-16 Actual	2016-17 Actual	2017-18 Actual	2018-19 Actual	2019-20 Actual	2020-21 Projected	2021-22 Projected
11.847%	13.888%	15.531%	18.062%	19.721%	22.70%	24.60%

Likewise, Assembly Bill 1469 increased the contribution rates that employers, employees and the state pay to support the State Teachers Retirement System. Employer rates will continue to increase until 2020-21. Thereafter, the STRS employer rate is set by the CalSTRS board.

CalSTRS Rates per Education Code Sections 22901.7 and 22950.5							
	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
Employer	10.73%	12.58%	14.43%	16.28%	18.13%	19.1%	18.10%

The following chart was included in the handouts of the School Services Inc., 2019-20 School Finance and Management Conference. It gives perspective on the magnitude of retirement cost increases compared to anticipated LCFF funding increases for the average district.



RESERVES

Reserve Caps – Our office continues to reinforce the need for reserves over the state minimum reserve requirements. Past experience has clearly demonstrated these minimum levels are not sufficient to protect educational programs from severe disruption in an economic downturn. The typical 3% reserve minimum represents less than two weeks of payroll for nearly all districts. Many LEAs have established reserve policies calling for higher than state minimum reserves, recognizing their duty to maintain fiscal solvency.

In October 2017 the Governor signed Senate Bill 751 which made significant changes to the previous Senate Bill 858 reserve cap requirements. These changes became effective January 1, 2018. The cap now allows for 10% of assigned or unassigned ending balances on a more limited number of district funds. It also exempts districts with fewer than 2,501 average daily attendance from the cap requirement.

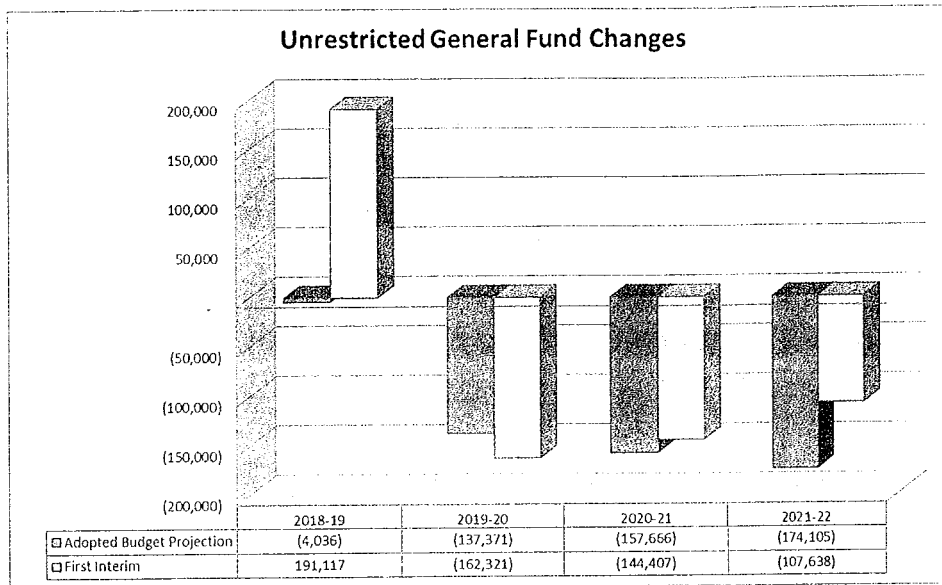
The provisions of SB 751 are not imposed until the year after funds in the Public School System Stabilization Account equals or exceeds 3% of Proposition 98 funding for school districts. The State Superintendent of Public Instruction is required to notify districts and county offices of education when the conditions are met. The \$389 million contribution made as part of the Governor's 2019-20 budget was short of the \$2.1 billion contribution amount that would have triggered the cap on district reserves in 2020-21.

Full Accrual Financial Position - As audit reports have begun to recognize long-term pension obligations under GASB 68, districts find their annual audit report may reflect a negative unrestricted balance on their Statement of Net Position. Beginning with fiscal year 2017-18, district audit reports will also reflect the full impact of long-term commitments for Other Post-Employment Benefits (Retiree health plans) under GASB 75. This will further reduce a district's unrestricted net position. This will likely result in public concern over the fiscal management of the school district and higher costs associated with long-term financing. Below is a comparison of the district's 2018-19 unaudited actual available reserves (modified accrual basis of accounting) compared to the 2018-19 audited unrestricted net position, which includes the full accrual impact of GASB 68 and GASB 75.

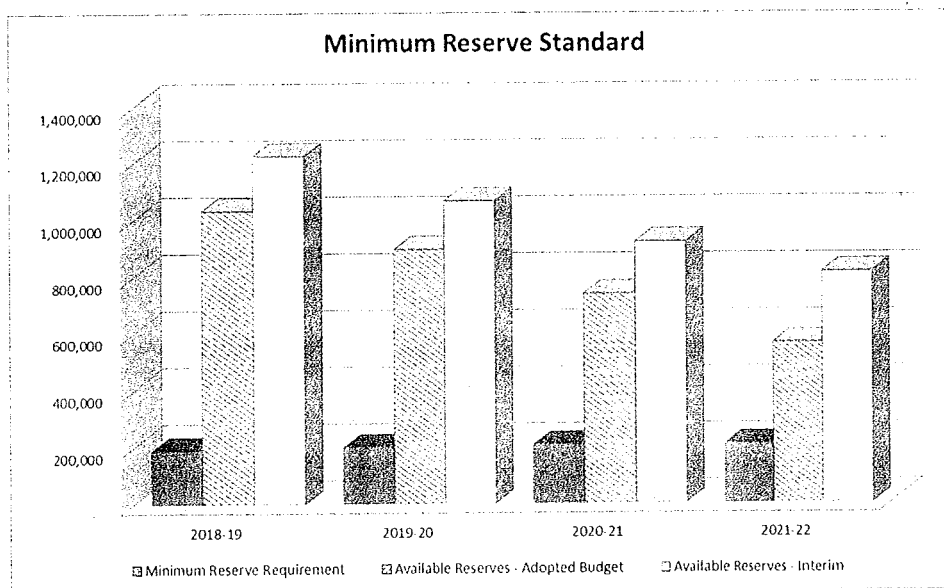
Unaudited Actuals Available Reserves	Audit Report Unrestricted Net Position	Difference
\$1,226,835	-\$2,478,599	-\$3,705,434

LOCAL CONTROL FUNDING FORMULA PROJECTIONS

Below is a comparison of the district's adopted budget and the current interim's anticipated change in the unrestricted general fund balance. The differences primarily represent an updated beginning balance for the year, changes in state LCFF estimates and changes in district provided ADA estimates.



The next graph presents the district's 2019-20 First Interim reserve status compared with the original adopted budget and state minimum reserve requirement.



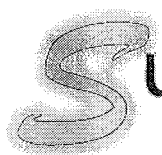
COMMENTS AND RECOMMENDATIONS

This section of our letter lists comments and recommendations we consider appropriate as a result of our review and current state budget projections.

- *The district is projecting significant deficit spending over the current and subsequent two fiscal years. This trend in declining balances must be addressed by the district to maintain district solvency. Below is a summary of the district's deficit spending pattern and available reserves calculation:*

	2019-20	2020-21	2021-22
Projected general fund			
deficit spending	(157,075)	(240,884)	(141,011)
Available Reserves \$	1,066,514	922,108	814,470
Available Reserves %	21.45%	17.92%	15.79%

- ◆ *The district has prior year accruals including accounts payable and accounts receivable that have not been reversed. We recommend the district review these accruals and reverse balances that are no longer payable or pending receipt.*
- ◆ *There are no additional comments or recommendations.*



SUNNYSIDE UNION SCHOOL DISTRICT

21644 Avenue 196 - Strathmore, California 93267 - (P) 559-568-1741 - www.sunnysideunion.com

AGENDA ITEM SUMMARY SHEET

Agenda Heading

- ☐ Closed Session
- ☐ Acknowledgement and Reports
- ☐ Routine Matters – Consent Calendar
- ☒ Information and Discussion
 - ☐ Business
 - ☐ Maintenance, Operations, and Transportation
 - ☐ Instruction
 - ☒ Board
- ☐ Local Control Accountability Plan
- ☐ Action Items

Agenda Item: VIII. E. a. Form 700 for 2019-2020 SY

Date: February 11, 2020

Presented By: Jeannette Torres-Marquez

Attachments: Yes ☒ No ☐

Summary

Information regarding Form 700 to be signed and submitted during the March 10, 2020, board meeting.

Board of Trustee: Kimberly Brazier | Humberto Cardenas | Schuyler Glover | Andy Manning | Humberto Quezada
Administration: Steve Tsuboi, Superintendent-Principal | Jody Gunderman, Vice Principal-Categorical Manager
Candy Alari, Business Manager | Jeannette Torres-Marquez, Administrative Secretary

**2019/2020
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

Contents

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• When to File.....	Page 6
• Terms & Definitions	Page 8

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 Boards and Commissions of Newly Created Agencies

Members must fully disclose their investments, interests in real property, business positions, and income (including loans, gifts, and travel payments) until the positions are covered under a conflict of interest code.

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.

Types of Form 700 Filings

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, 2019, through December 31, 2019. If the period covered by the statement is different than January 1, 2019, through December 31, 2019, (for example, you assumed office between October 1, 2018, and December 31, 2018 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 2019.

- 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, 2019, through the date you stopped performing the duties of your position. If the period covered differs from January 1, 2019, through the date you stopped performing the duties of your position (for example, you assumed office between October 1, 2018, and December 31, 2018, 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 2019.

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.

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 Boards and Commissions of Newly Created Agencies:

File with your newly created agency or with your agency's code reviewing body as provided by your code reviewing body.

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

Assuming Office Statements:

Filer	Deadline
Elected officials	30 days after assuming office
Appointed positions specified in Gov. Code Section 87200 or Newly created board and commission members not covered by a conflict of interest code	30 days after assuming office or 10 days after appointment or nomination if subject to Senate or judicial confirmation
Other appointed positions (including those held by newly-hired employees) that are or will be designated in a conflict of interest code	30 days after assuming office (30 days after appointment or nomination if subject to Senate confirmation)
Positions newly added to a new or amended conflict of interest code	30 days after the effective date of the code or code amendment

Exceptions:

- Elected state officers who assume office in December or January are not required to file an assuming office statement, but will file the next annual statement due.
- 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 an assuming 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 an assuming 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.

Late statements are subject to a late fine of \$10 per day per position up to \$100 for each day the statement is late.

Annual Statements:

- Elected state officers (including members of the state legislature, members elected to the Board of Administration of the California Public Employees' Retirement System and members elected to the Teachers' Retirement Board);
Judges and court commissioners; and
Members of state boards and commissions specified in Gov. Code Section 87200:
File no later than **Monday, March 2, 2020.**
- County and city officials specified in Gov. Code Section 87200:
File no later than **Wednesday, April 1, 2020.**
- Multi-County officials:
File no later than **Wednesday, April 1, 2020.**
- State and local officials and employees designated in a conflict of interest code:
File on the date prescribed in the code (April 1 for most filers).

Exception:

If you assumed office between October 1, 2019, and December 31, 2019, and filed an assuming office statement, you are not required to file an annual statement until March 2, 2021, or April 1, 2021, whichever is applicable. The annual statement will cover the day after you assumed office through December 31, 2020.

Incumbent officeholders who file candidate statements also must file annual statements by the specified deadlines.

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

The instructions located on the back of each schedule describe the types of interests that must be reported. The purpose of this section is to explain other terms used in Form 700 that are not defined in the instructions to the schedules or elsewhere.

Blind Trust: See Trusts, Reference Pamphlet, page 16.

Business Entity: Any organization or enterprise operated for profit, including a proprietorship, partnership, firm, business trust, joint venture, syndicate, corporation, or association. This would include a business for which you take business deductions for tax purposes (for example, a small business operated in your home).

Code Filer: An individual who has been designated in a state or local agency's conflict of interest code to file statements of economic interests.

An individual hired on or after January 1, 2019 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 such disclosure. See Regulation 18734.

Commission Income: "Commission income" means gross payments of \$500 or more received during the period covered by the statement as a broker, agent, or salesperson, including insurance brokers or agents, real estate brokers or agents, travel agents or salespersons, stockbrokers, and retail or wholesale salespersons, among others.

In addition, you may be required to disclose the names of sources of commission income if your pro rata share of the gross income was \$10,000 or more from a single source during the reporting period. If your spouse or registered domestic partner received commission income, you would disclose your community property share (50%) of that income (that is, the names of sources of \$20,000 or more in gross commission income received by your spouse or registered domestic partner).

Report commission income as follows:

- If the income was received through a business entity in which you and your spouse or registered domestic partner had a 10% or greater ownership interest (or if you receive commission income on a regular basis as an independent contractor or agent), use Schedule A-2.
- If the income was received through a business entity in which you or your spouse or registered domestic partner **did not receive commission income on a regular basis** or you had a less than 10% ownership interest, use Schedule C.

The "source" of commission income generally includes all parties to a transaction, and each is attributed the full value of the commission.

Examples:

- You are a partner in Jameson and Mulligan Insurance Company and have a 50% ownership interest in the company. You sold two Businessmen's Insurance Company policies to XYZ Company during the reporting period. You received commission income of \$5,000 from the first transaction and \$6,000 from the second. On Schedule A-2, report your partnership interest in and income received from Jameson and Mulligan Insurance Company in Parts 1 and 2. In Part 3, list both Businessmen's Insurance Company and XYZ Company as sources of \$10,000 or more in commission income.
- You are a stockbroker for Prince Investments, but you have no ownership interest in the firm. You receive commission income on a regular basis through the sale of stock to clients. Your total gross income from your employment with Prince Investments was over \$100,000 during the reporting period. On Schedule A-2, report your name as the name of the business entity in Part 1 and the gross income you have received in Part 2. (Because you are an employee of Prince Investments, you do not need to complete the information in the box in Part 1 indicating the general description of business activity, fair market value, or nature of investment.) In Part 3, list Prince Investments and the names of any clients who were sources of \$10,000 or more in commission income to you.
- You are a real estate agent and an independent contractor under Super Realty. On Schedule A-2, Part 1, in addition to your name or business name, complete the business entity description box. In Part 2, identify your gross income. In Part 3, for each transaction that resulted in commission income to you of \$10,000 or more, you must identify the brokerage entity, each person you represented, and any person who received a finder's or other referral fee for referring a party to the transaction to the broker.

Note: If your pro rata share of commission income from a single source is \$500 or more, you may be required to disqualify yourself from decisions affecting that source of income, even though you are not required to report the income. (See Reference Pamphlet, page 12.)

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 his or her 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 he or she could significantly affect through the exercise of his or her 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 he or she holds 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)

Diversified Mutual Fund: Diversified portfolios of stocks, bonds, or money market instruments that are managed by investment companies whose business is pooling the money of many individuals and investing it to seek a common investment goal. Mutual funds are managed by trained professionals who buy and sell securities. A typical mutual fund will own between 75 to 100 separate securities at any given time so they also provide instant diversification. *Only diversified mutual funds registered with the Securities and Exchange Commission under the Investment Company Act of 1940 are exempt from disclosure.* In addition, Regulation 18237 provides an exception from reporting other funds that are similar to diversified mutual funds. (See Reference Pamphlet, page 13.)

Elected State Officer: Elected state officers include the Governor, Lieutenant Governor, Attorney General, Insurance Commissioner, State Controller, Secretary of State, State Treasurer, Superintendent of Public Instruction, members of the State Legislature, members of the State Board of Equalization, elected members of the Board of Administration of the California Public Employees' Retirement System and members elected to the Teachers' Retirement Board.

Enforcement: The FPPC investigates suspected violations of the Act. Other law enforcement agencies (the Attorney General or district attorney) also may initiate investigations under certain circumstances. If violations are found, the Commission may initiate administrative enforcement proceedings that could result in fines of up to \$5,000 per violation.

Instead of administrative prosecution, a civil action may be brought for negligent or intentional violations by the appropriate civil prosecutor (the Commission, Attorney General, or district attorney), or a private party residing within the jurisdiction. In civil actions, the measure of damages is up to the amount or value not properly reported.

Persons who violate the conflict of interest disclosure provisions of the Act also may be subject to agency discipline, including dismissal.

Finally, a knowing or willful violation of any provision of the Act is a misdemeanor. Persons convicted of a misdemeanor may be disqualified for four years from the date of the conviction from serving as a lobbyist or running for elective office, in addition to other penalties that may be imposed. The Act also provides for numerous civil penalties, including monetary penalties and damages, and injunctive relief from the courts.

Expanded Statement: Some officials or employees may have multiple filing obligations (for example, a city council member who also holds a designated position with a county agency, board, or commission). Such officials or employees may complete one expanded statement covering the disclosure requirements for all positions and file a complete, originally signed copy with each agency.

Fair Market Value: When reporting the value of an investment, interest in real property, or gift, you must disclose the fair market value – the price at which the item would sell for on the open market. This is particularly important when valuing gifts, because the fair market value of a gift may be different from the amount it cost the donor to provide the gift. For example, the wholesale cost of a bouquet of flowers may be \$10, but the fair market value may be \$25 or more. In addition, there are special rules for valuing free tickets and passes. Call or email the FPPC for assistance.

Gift and Honoraria Prohibitions

Gifts:

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 officials and employees of state and local government agencies who are designated in a conflict of interest code were prohibited from accepting a gift or gifts totaling more than \$470 in a calendar year from a single source in 2018. The gift limit is \$500 in 2019 and 2020.

In addition, elected state officers, candidates for elective state offices, and officials and employees of state agencies are subject to a \$10 per calendar month limit on gifts from lobbyists and lobbying firms registered with the Secretary of State.

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.

Terms & Definitions - (continued)

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 he or she is 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 his or her income.

Separate Property Agreement: Generally, a public official is required to disclose his or her community property share of his or her spouse's income. But, when a public official and his or her 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 his or her 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)

- Pat and Mark Johnson, a married couple, own Classic Autos. Income to this business was \$200,000. In determining the amount to report for income on Schedule A-2, Part 2, Mark must include his 50% share (\$100,000) and 50% of his spouse's share (\$50,000). Thus, his reportable income would be \$150,000 and he will check the box indicating \$100,001-\$1,000,000. (See Reference Pamphlet, page 13, for an example of how to calculate the value of this investment and interest in real property.)

You are not required to report:

- Salary, reimbursement for expenses or per diem, 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
- 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.
- Campaign contributions
- A cash bequest or cash inheritance
- Returns on a security registered with the Securities and Exchange Commission, including dividends, interest, or proceeds from a sale of stocks or bonds unless the purchaser can be identified.
- Redemption of a mutual fund
- Payments received under an insurance policy, including an annuity
- Interest, dividends, or premiums on a time or demand deposit in a financial institution, shares in a credit union, an insurance policy, or a bond or other debt instrument issued by a government agency
- Your spouse's or registered domestic partner's income that is legally "separate" income so long as the funds are not commingled with community funds or used to pay community expenses
- Income of dependent children
- Automobile trade-in allowances from dealers
- Loans and loan repayments received from your spouse or registered domestic partner, child, parent, grandparent, grandchild, brother, sister, parent-in-law, brother-in-law, sister-in-law, nephew, niece, aunt, uncle, or first cousin unless he or she was acting as an intermediary or agent for any person not covered by this provision
- Alimony or child support payments
- Payments received under a defined benefit pension plan qualified under Internal Revenue Code Section 401(a)

- Any loan from a commercial lending institution made in the lender's regular course of business on terms available to the public without regard to your official status
- Any retail installment or credit card debts incurred in the creditor's regular course of business on terms available to the public without regard to your official status
- Loans made to others. However, repayments may be reportable on Schedule C
- A loan you co-signed for another person unless you made payments on the loan during the reporting period

Incentive Compensation: "Incentive compensation" means income over and above salary that is either ongoing or cumulative, or both, as sales or purchases of goods or services accumulate. Incentive compensation is calculated by a predetermined formula set by the official's employer which correlates to the conduct of the purchaser in direct response to the effort of the official.

Incentive compensation does not include:

- Salary
- Commission income (*For information regarding disclosure of "commission income," see Reference Pamphlet, page 8.*)
- Bonuses for activity not related to sales or marketing, the amount of which is based solely on merit or hours worked over and above a predetermined minimum
- Executive incentive plans based on company performance, provided that the formula for determining the amount of the executive's incentive income does not include a correlation between that amount and increased profits derived from increased business with specific and identifiable clients or customers of the company
- Payments for personal services which are not marketing or sales

The purchaser is a source of income to the official if all three of the following apply:

- the official's employment responsibilities include directing sales or marketing activity toward the purchaser; and
- there is direct personal contact between the official and the purchaser intended by the official to generate sales or business; and
- there is a direct relationship between the purchasing activity of the purchaser and the amount of the incentive compensation received by the official.

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 his or her 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)

See the following explanations to determine what your jurisdiction is:

State Offices and All Courts: Your jurisdiction is the state if you are an elected state officer, a state legislator, or a candidate for one of these offices. Judges, judicial candidates, and court commissioners also have statewide jurisdiction. (*In re Baty* (1979) 5 FPPC Ops. 10) If you are an official or employee of, or a consultant to, a state board, commission, or agency, or of any court or the State Legislature, your jurisdiction is the state.

County Offices: Your jurisdiction is the county if you are an elected county officer, a candidate for county office, or if you are an official or employee of, or a consultant to, a county agency or any agency with jurisdiction solely within a single county.

City Offices: Your jurisdiction is the city if you are an elected city officer, a candidate for city office, or you are an official or employee of, or a consultant to, a city agency or any agency with jurisdiction solely within a single city.

Multi-County Offices: If you are an elected officer, candidate, official or employee of, or a consultant to a multi-county agency, your jurisdiction is the region, district, or other geographical area in which the agency has jurisdiction. (Example: A water district has jurisdiction in a portion of two counties. Members of the board are only required to report interests located or doing business in that portion of each county in which the agency has jurisdiction.)

Other (for example, school districts, special districts and JPAs): If you are an elected officer, candidate, official or employee of, or a consultant to an agency not covered above, your jurisdiction is the region, district, or other geographical area in which the agency has jurisdiction. See the multi-county example above.

Leasehold Interest: The term "interest in real property" includes leasehold interests. An interest in a lease on real property is reportable if the value of the leasehold interest is \$2,000 or more. The value of the interest is the total amount of rent owed by you during the reporting period or, for a candidate or assuming office statement, during the prior 12 months.

You are not required to disclose a leasehold interest with a value of less than \$2,000 or a month-to-month tenancy.

Loan Reporting: Filers are not required to report loans from commercial lending institutions or any indebtedness created as part of retail installment or credit card transactions that are made in the lender's regular course of business, without regard to official status, on terms available to members of the public.

Loan Restrictions: State and local elected and appointed public officials are prohibited from receiving any personal loan totaling more than \$250 from an official, employee, or consultant of their government agencies or any government agency over which the official or the official's agency has direction or control. In addition, loans of more than \$250 from any person who has a contract with the official's agency or an agency under the official's control are prohibited unless the loan is from a commercial lending institution or part of a retail installment or credit card transaction made in the regular course of business on terms available to members of the public.

State and local elected officials are also prohibited from receiving any personal loan of \$500 or more unless the loan agreement is in writing and clearly states the terms of the loan, including the parties to the loan agreement, the date, amount, and term of the loan, the date or dates when payments are due, the amount of the payments, and the interest rate on the loan.

Campaign loans and loans from family members are not subject to the \$250 and \$500 loan prohibitions.

A personal loan made to a public official that is not being repaid or is being repaid below certain amounts will become a gift to the official under certain circumstances. Contact the FPPC for further information, or 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).

Privileged Information: FPPC Regulation 18740 sets out specific procedures that must be followed in order to withhold the name of a source of income. Under this regulation, you are not required to disclose on Schedule A-2, Part 3, the name of a person who paid fees or made payments to a business entity if disclosure of the name would violate a legally recognized privilege under California or Federal law. However, you must provide an explanation for nondisclosure, separately stating for each undisclosed person: the legal basis for the assertion of the privilege, facts demonstrating why the privilege is applicable, and that to the best of your knowledge you have not and will not make, participate in making, or use your official position to influence a governmental decision affecting the undisclosed person in violation of Government Code Section 87100. 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,

Terms & Definitions - (continued)

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 exceeds \$2,000, she will be required to disclose the real property on Schedule B for that reporting period.

Terms & Definitions - (continued)

Trusts: Investments and interests in real property held and income received by a trust (including a living trust) are reported on Schedule A-2 if you, your spouse or registered domestic partner, and your dependent children together had a 10% or greater interest in the trust and your pro rata share of a single investment or interest in real property was \$2,000 or more.

You have an interest in a trust if you are a trustor and:

- Can revoke or terminate the trust;
- Have retained or reserved any rights to the income or principal of the trust or retained any reversionary or remainder interest; or
- Have retained any power of appointment, including the power to change the trustee or the beneficiaries.

Or you are a beneficiary and:

- Presently receive income (see Gov. Code Section 82030); or
- Have an irrevocable future right to receive income or principal. (See FPPC Regulation 18234 for more information.)

Examples:

- Sarah Murphy has set up a living trust that holds her principal residence, stock in several companies that do business in her jurisdiction, and a rental home in her agency's jurisdiction. Since Sarah is the trustor and can revoke or terminate the trust, she must disclose any stock worth \$2,000 or more and the rental home on Schedule A-2. Sarah's residence is not reportable because it is used exclusively as her personal residence.
- Chao Yee is listed as a beneficiary in his grandparents' trust. However, Chao does not presently receive income from the trust, nor does he have an irrevocable future right to receive income or principal. Therefore, Chao is not required to disclose any assets contained in his grandparents' trust.

Blind Trusts:

A blind trust is a trust managed by a disinterested trustee who has complete discretion to purchase and sell assets held by the trust. If you have a direct, indirect, or beneficial interest in a blind trust, you may not be required to disclose your pro rata share of the trust's assets or income. However, the trust must meet the standards set out in FPPC Regulation 18235, and you must disclose reportable assets originally transferred into the blind trust and income from those original assets on Schedule A-2 until they have been disposed of by the trustee.

Trustees:

If you are only a trustee, you do not have a reportable interest in the trust. However, you may be required to report the income you received from the trust for performing trustee services.

Wedding Gifts: Wedding gifts must be disclosed if they were received from a reportable source during the period covered by the statement. Gifts valued at \$50 or more are reportable; however, a wedding gift is considered a gift to both spouses equally. Therefore, you would count one-half of the value of a wedding gift to determine if it is reportable and need only report individual gifts with a total value of \$100 or more.

For example, you receive a place setting of china valued at \$150 from a reportable source as a wedding gift. Because the value to you is \$50 or more, you must report the gift on Schedule D, but may state its value as \$75.

Wedding gifts are not subject to the \$ 500 gift limit, but they are subject to the \$10 lobbyist/lobbying firm gift limit for state officials.

Privacy Information Notice

Information requested on all FPPC forms is used by the FPPC to administer and enforce the Political Reform Act (Gov. Code Sections 81000-91014 and California Code of Regulations Sections 18110-18997). All information required by these forms is mandated by the Political Reform Act. Failure to provide all of the information required by the Act is a violation subject to administrative, criminal, or civil prosecution. All reports and statements provided are public records open for public inspection and reproduction.

If you have any questions regarding this Privacy Notice or how to access your personal information, please contact the FPPC at:

General Counsel
Fair Political Practices Commission
1102 Q Street, Suite 3000
Sacramento, CA 95811
(916) 322-5660
(866) 275-3772

2019-2020 Statement of Economic Interests



Form 700

A Public Document

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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 2019

Quick Start Guide

Detailed instructions begin on page 3.

WHEN IS THE ANNUAL STATEMENT DUE?

- March 2 – 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-FILING 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 \$500 for calendar years 2019 and 2020.

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.
- Members of newly created boards and commissions not yet covered under a conflict of interest code
- 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 Boards and Commissions of Newly

Created Agencies: File with your newly created agency or with your agency's code reviewing body.

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 with your local elections office.

How to file:

The Form 700 is available at www.fppc.ca.gov. Form 700 schedules are also available in Excel format. All

statements must have an original "wet" signature or be duly authorized by your filing officer to file electronically under Government Code Section 87500.2.

When to file:

Annual Statements

➤ March 2, 2020

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

➤ April 1, 2020

- Most other filers

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

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, 2019, and December 31, 2019, and filed an assuming office statement, you are not required to file an annual statement until March 2, 2021, or April 1, 2021, whichever is applicable. The annual statement will cover the day after you assumed office through December 31, 2020. (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, 2019, through December 31, 2019. If the period covered by the statement is different than January 1, 2019, through December 31, 2019, (for example, you assumed office between October 1, 2018, and December 31, 2018 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 2019.

- 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, 2019, through the date you stopped performing the duties of your position. If the period covered differs from January 1, 2019, through the date you stopped performing the duties of your position (for example, you assumed office between October 1, 2018, and December 31, 2018, 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 2019.

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.

COVER PAGE

A PUBLIC DOCUMENT

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, 2019, through
December 31, 2019.

☐ Leaving Office: Date Left / /
(Check one circle.)

-or-

The period covered is / / , through
December 31, 2019.

☐ The period covered is January 1, 2019, through the date of
leaving office.

-or-

☐ The period covered is / / , through
the date of leaving office.

☐ Assuming Office: Date assumed / /

☐ Candidate: Date of Election and office sought, if different than Part 1:

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

Schedules attached

☐ Schedule A-1 - Investments - schedule attached

☐ Schedule C - Income, Loans, & Business Positions - schedule attached

☐ Schedule A-2 - Investments - schedule attached

☐ Schedule D - Income - Gifts - schedule attached

☐ Schedule B - Real Property - schedule attached

☐ Schedule E - Income - Gifts - Travel Payments - schedule attached

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

5. Verification

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

DAYTIME TELEPHONE NUMBER

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.)

Instructions Cover Page

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

Part 1. Office, Agency, or Court

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

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

Example:

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

Part 2. Jurisdiction of Office

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

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

Example:

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

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

Part 3. Type of Statement

Check at least one box. The period covered by a statement is determined by the type of statement you are filing. If you are completing a 2019 annual statement, **do not** change the pre-printed dates to reflect 2020. Your annual statement is used for reporting the **previous year's** economic interests. Economic interests for your annual filing covering January 1, 2020, through December 31, 2020, will be disclosed on your statement filed in 2021. See Reference Pamphlet, page 4.

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

Part 4. Schedule Summary

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

Part 5. Verification

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

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

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:

____/____/19 ____/____/19
ACQUIRED 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:

____/____/19 ____/____/19
ACQUIRED 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:

____/____/19 ____/____/19
ACQUIRED 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:

____/____/19 ____/____/19
ACQUIRED 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:

____/____/19 ____/____/19
ACQUIRED 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:

____/____/19 ____/____/19
ACQUIRED DISPOSED

Comments: _____

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)
- 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.

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.

SCHEDULE A-2
Investments, Income, and Assets
of Business Entities/Trusts
(Ownership Interest is 10% or Greater)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION Name _____

▶ 1. BUSINESS ENTITY OR TRUST

Name _____

Address (Business Address Acceptable) _____

Check one

☐ Trust, go to 2 ☐ Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$0 - \$1,999
☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

_____/_____/19 ____/_____/19
ACQUIRED DISPOSED

NATURE OF INVESTMENT

☐ Partnership ☐ Sole Proprietorship ☐ _____ Other

YOUR BUSINESS POSITION _____

▶ 1. BUSINESS ENTITY OR TRUST

Name _____

Address (Business Address Acceptable) _____

Check one

☐ Trust, go to 2 ☐ Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$0 - \$1,999
☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

_____/_____/19 ____/_____/19
ACQUIRED DISPOSED

NATURE OF INVESTMENT

☐ Partnership ☐ Sole Proprietorship ☐ _____ Other

YOUR BUSINESS POSITION _____

▶ 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)

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

▶ 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)

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

▶ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)

☐ None or ☐ Names listed below

▶ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)

☐ None or ☐ Names listed below

▶ 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST

Check one box:

☐ INVESTMENT ☐ REAL PROPERTY

Name of Business Entity, if Investment, or
Assessor's Parcel Number or Street Address of Real Property

Description of Business Activity or
City or Other Precise Location of Real Property

FAIR MARKET VALUE

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

IF APPLICABLE, LIST DATE:

_____/_____/19 ____/_____/19
ACQUIRED DISPOSED

NATURE OF INTEREST

☐ Property Ownership/Deed of Trust ☐ Stock ☐ Partnership

☐ Leasehold _____
Yrs. remaining

☐ Other _____

☐ Check box if additional schedules reporting investments or real property are attached

▶ 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST

Check one box:

☐ INVESTMENT ☐ REAL PROPERTY

Name of Business Entity, if Investment, or
Assessor's Parcel Number or Street Address of Real Property

Description of Business Activity or
City or Other Precise Location of Real Property

FAIR MARKET VALUE

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

IF APPLICABLE, LIST DATE:

_____/_____/19 ____/_____/19
ACQUIRED DISPOSED

NATURE OF INTEREST

☐ Property Ownership/Deed of Trust ☐ Stock ☐ Partnership

☐ Leasehold _____
Yrs. remaining

☐ Other _____

☐ Check box if additional schedules reporting investments or real property are attached

Comments: _____

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,

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	<input type="checkbox"/> 18
<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"/> \$10,001 - \$100,000
<input checked="" type="checkbox"/> \$100,001 - \$1,000,000	<input type="checkbox"/> Over \$1,000,000
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 Petroilo	
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 type="checkbox"/> \$10,001 - \$100,000	<input type="checkbox"/> Over \$100,000
<input checked="" type="checkbox"/> Guarantor if applicable	
Comments:	

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?

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

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name _____

► **1. INCOME RECEIVED**

NAME OF SOURCE OF INCOME _____

ADDRESS (Business Address Acceptable) _____

BUSINESS ACTIVITY, IF ANY, OF SOURCE _____

YOUR BUSINESS POSITION _____

GROSS INCOME RECEIVED ☐ No Income - Business Position Only

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

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

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

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

☐ Loan repayment

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

(Describe)

☐ Other _____
(Describe)

► **1. INCOME RECEIVED**

NAME OF SOURCE OF INCOME _____

ADDRESS (Business Address Acceptable) _____

BUSINESS ACTIVITY, IF ANY, OF SOURCE _____

YOUR BUSINESS POSITION _____

GROSS INCOME RECEIVED ☐ No Income - Business Position Only

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

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

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

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

☐ Loan repayment

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

(Describe)

☐ Other _____
(Describe)

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

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

NAME OF LENDER* _____

ADDRESS (Business Address Acceptable) _____

BUSINESS ACTIVITY, IF ANY, OF LENDER _____

HIGHEST BALANCE DURING REPORTING PERIOD

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

INTEREST RATE

TERM (Months/Years)

_____ % ☐ None

SECURITY FOR LOAN

☐ None

☐ Personal residence

☐ Real Property _____
Street address

City

☐ Guarantor _____

☐ Other _____
(Describe)

Comments: _____

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

NAME OF SOURCE (Not an Acronym)

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

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

NAME OF SOURCE (Not an Acronym)

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

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

NAME OF SOURCE (Not an Acronym)

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

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

NAME OF SOURCE (Not an Acronym)

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

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

NAME OF SOURCE (Not an Acronym)

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

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

NAME OF SOURCE (Not an Acronym)

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

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

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 \$500 limit in 2019. (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.

▶ NAME OF SOURCE (Not an Acronym) _____

ADDRESS (Business Address Acceptable) _____

CITY AND STATE _____

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

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

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

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE (Not an Acronym) _____

ADDRESS (Business Address Acceptable) _____

CITY AND STATE _____

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

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

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

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE (Not an Acronym) _____

ADDRESS (Business Address Acceptable) _____

CITY AND STATE _____

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

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

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

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE (Not an Acronym) _____

ADDRESS (Business Address Acceptable) _____

CITY AND STATE _____

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

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

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

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

Comments: _____

Instructions – Schedule E Travel Payments, Advances, and Reimbursements

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

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

You are not required to disclose:

- Travel payments received from any state, local, or federal government agency for which you provided services equal or greater in value than the payments received, such as reimbursement for travel on agency business from your government agency employer.
- A payment for travel from another local, state, or federal government agency and related per diem expenses when the travel is for education, training or other inter-agency programs or purposes.
- Travel payments received from your employer in the normal course of your employment that are included in the income reported on Schedule C.
- A travel payment that was received from a 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 \$50 or more from a single source during the period covered by the statement.

When reporting travel payments that are gifts, you must provide a description of the gift, 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

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

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.)

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 personal assets and income. They also must disqualify themselves from participating in decisions that may affect their personal economic interests. 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 law's provisions.

Gift Prohibition

Gifts received by most state and local officials, employees, and candidates are subject to a limit. In 2019-2020, the gift limit is \$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 complete one statement listing the county and the two boards on the Cover Page or an attachment as the agencies for which you will be filing. Report your economic interests using the largest jurisdiction and highest disclosure requirements assigned to you by the three agencies. Make two copies of the entire statement before signing it, sign each copy with an original signature, and distribute one original to the county and to each of the two boards. 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.
- 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.

Questions and Answers Continued

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.)

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.

Questions and Answers

Continued

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 real property for you.

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.

Questions and Answers

Continued

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 2019 the gift limit was \$500, so the Bensons may have given the supervisor artwork valued at no more than \$1,000. 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?

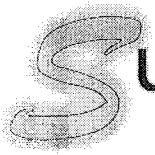
A. Because the gift basket was donated by an outside source (not an agency employee), you have received a reportable gift valued at \$110 (the value of the basket less the consideration paid). The source of the gift is Doug Brewer and the agency is disclosed as the intermediary. Because the quilt was 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.



SUNNYSIDE UNION SCHOOL DISTRICT

21644 Avenue 196 - Strathmore, California 93267 - (P) 559-568-1741 - www.sunnysideunion.com

AGENDA ITEM SUMMARY SHEET

Agenda Heading

- ☐ Closed Session
- ☐ Acknowledgement and Reports
- ☐ Routine Matters – Consent Calendar
- ☒ Information and Discussion
 - ☐ Business
 - ☐ Maintenance, Operations, and Transportation
 - ☐ Instruction
 - ☒ Board
- ☐ Local Control Accountability Plan
- ☐ Action Items

Agenda Item: VIII. E. b. 2020 CSBA Delegate Assembly Election

Date: February 11, 2020

Presented By: Jeannette Torres-Marquez

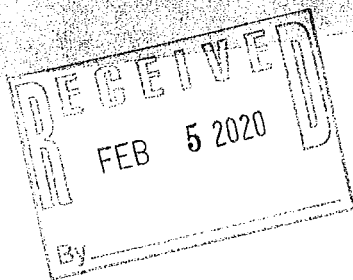
Attachments: Yes ☒ No ☐

Summary

The information is for the 2020 CSBA Delegate Assembly Election (Tulare County); to be voted on during the March 10, 2020, board meeting. Enclosed is the information needed to select the representative for this position by the Sunnyside elected Board Representative.

Board of Trustee: Kimberly Brazier | Humberto Cardenas | Schuyler Glover | Andy Manning | Humberto Quezada
Administration: Steve Tsuboi, Superintendent-Principal | Jody Gunderman, Vice Principal-Categorical Manager
Candy Alari, Business Manager | Jeannette Torres-Marquez, Administrative Secretary





REQUIRES BOARD ACTION

Due: Mon. Mar. 16—return ballot in enclosed envelope

January 31, 2020

MEMORANDUM

To: All Board Presidents and Superintendents — CSBA Member Boards
From: Xilonin Cruz-Gonzalez, CSBA President
Re: 2020 Ballot for CSBA Delegate Assembly — **U.S. Postmark Deadline is Mon. March 16**

Enclosed is the ballot material for election to CSBA's Delegate Assembly from your region or subregion. It consists of: 1) the ballot (on red paper), the reverse side of which contains the names of ALL current members of the Delegate Assembly from your region or subregion; and 2) the required candidate biographical sketch form and, if submitted, a resume. In addition, provided is a copy of the ballot on white paper to include with your board agenda. **Only the ballot on red paper is to be completed and returned to CSBA. It must be postmarked by the U.S. Post Office on or before Monday, March 16, 2020. No exceptions.**

Your Board may vote for up to the number of vacancies in the region or subregion as indicated on the ballot. For example, if there are three vacancies, the Board may vote for up to three candidates. However, your Board may cast no more than one vote for any one candidate. (The ballot also contains a provision for write-in candidates; their name and district must be clearly printed in the space provided.)

The ballot must be signed by the Superintendent or Board Clerk and returned in the enclosed envelope; if the envelope is misplaced, you may use your district's stationery. Please write **DELEGATE ELECTION** prominently on the envelope along with the region or subregion number on the bottom left corner of the envelope (this number appears at the top of the ballot).

If there is a tie vote, a run-off election will be held. All re-elected and newly elected Delegates will serve two-year terms beginning April 1, 2020 – March 31, 2022. The next meeting of the Delegate Assembly takes place on Saturday, May 16 and Sunday, May 17 at the Hyatt Regency in Sacramento. The names of all Delegates will be available on CSBA's website no later than Wednesday, April 1. Please do not hesitate to contact CSBA's Executive Office at (800) 266-3382 should you have any questions.

Encs: Ballot on red paper and watermarked "copy" of ballot on white paper
List of all current Delegates on reverse side of ballot
Candidate(s)' required Biographical Sketch Forms and resumes, if provided
CSBA-addressed envelope to send back ballots

Delegate Assembly Biographical Sketch Form for 2020 election

DUE: Tuesday, January 7, 2020 – no late submissions accepted

Please complete, sign, and date this required biographical sketch form. An optional, ONE-page, single-sided, résumé may also be submitted. Please do not state "see résumé" and do not re-type this form. It is the candidate's responsibility to confirm that all nomination materials have been received by the CSBA Executive Office, call 800.266.3382 or email at nominations@csba.org.

Your signature indicates your consent to have your name placed on the ballot and to serve as a Delegate, if elected.

Signature: 

Date: 11-22-2019

Name: Peter Lara, Jr.

CSBA Region & subregion #: 12-A

District or COE: Porterville Unified School District

Years on board: 15

Profession: Farmer Contact Number (please check ☒ Cell ☒ Home ☒ Bus.): 559-361-4959

*Primary E-mail: plara@portervilleschools.org

(*Communications from CSBA will be sent to primary email)

Are you an incumbent Delegate? ☒ Yes ☒ No | If yes, year you became Delegate: 2014

Why are you interested in becoming a Delegate? Please describe the skills and experiences you would bring to the Delegate Assembly.

To have a more direct voice in ensuring all students have the opportunity at the best public education available. Listening and having the ability to see beyond what is being verbalized. Serving three different districts, elementary, high school, unified, and six superintendents has given me the experience to see that there are many unique solutions to any given opportunity.

Please describe your activities and involvement on your local board, community, and/or CSBA.

I have been on various committees, superintendent search, board vacancy member search, Porterville Education Foundation, and President of the Board. I am a member of the Exchange Club of Porterville, past President for the Exchange Club of Porterville, Ag Advisory Board, Tulare County School Boards Association Vice President, CIF Board Representative, and a member of Region 12A Delegate Assembly.

What do you see as the biggest challenge facing governing boards and how can CSBA help address it?

Communication and marketing. As the voice of the students of California's public schools, we need to be more forceful. We need to applaud our elected representatives in Sacramento and Washington DC when they advocate for our students. We need to publicly recognize when they fall short. Our message needs to be clearer, cleaner and more often. Words matter when we say, 'I want Full and Fair Funding.' The message implies a 'want.' We 'need' Full and Fair Funding. In public education we operate on the basis of need. CSBA has done a very good job of sending that message. CSBA needs to collect best practices in communication and market those practices to all members.

Submit biographical sketch form only once, do not send multiple times. E-mail: nominations@csba.org, or fax to (916) 371-3407, or US Mail to: CSBA Exec. Office | Attn: DA Elections | 3251 Beacon Blvd., West Sacto, CA 95691 by the deadline: Tues. Jan. 7, 2020.

CSBA Regional County Delegate & CCBE Board of Directors Biographical Sketch Form Due Tuesday, January 7, 2020

Please complete, sign, and date this required biographical sketch form. An optional, ONE-page, single-sided, résumé may also be submitted. Please do not state "see résumé" and do not re-type this form. It is the candidate's responsibility to confirm that all nomination materials have been received by the CSBA Executive Office, call 800.266.3382 or email at nominations@csba.org.

Your signature indicates your consent to have your name placed on the ballot to serve as a CSBA Delegate and as a member of the California County Boards of Education (CCBE) Board of Directors, if elected.

Signature: _____ Date: 12/10/2019

Name: Lucia D. Vazquez CSBA Region #: 12A - Tulare
COE or County USD: Tulare County Years on board: 8
Profession: Weaver/ Consultant Contact Number (please v ☒ Cell ☐ Home ☐ Bus.): 559-381-1781
*Primary E-mail: lvazquez@vusd.org
(*Communications from CSBA will be sent to primary email)
Are you an incumbent Delegate? ☒ Yes ☐ No | If yes, year you became Delegate: 2016

Why are you interested in becoming a CSBA Regional County Delegate and a member of CCBE's Board of Directors?
Please describe the skills and experiences you would bring.

My time participating in the Delegate Assembly has been very rewarding. I take my position and representation on the Board of Education very serious. As the first Latina ever elected to my District's Board, I bring a different perspective. I worked at a school district for seven years managing grants. I believe in higher education and walk the talk. I have a B.A. in science. My Master's degree thesis focused on young adult Latina literature. My doctoral degree is in organizational leadership. I work as a consultant, facilitator, and executive coach. I am a very good leader, listener and team player. These are the skills and experiences I bring to the Delegate Assembly.

Please describe your activities and involvement on your local board, community, CSBA, and/or CCBE.

I represent females and people of color in large and small schools. We have both rural schools in our district and at almost 30,000 students are almost an urban district. Before joining the Board, I participated in School Site Council, district committees and served as PTA president. I bring my education and these experiences to the Board and to the Assembly. In my district, I am frequently involved in School Smarts, PIQE and Joven Noble graduation ceremonies. I participate in several board committees and am the current president of the city and school joint Facilities Board. I am very active in the community as well: offering strategic planning and grant writing often pro-bono for non profits. I was recently elected to the Board of CLSBA and am chairing the Planning Committee for the Central Valley Regional Summit.

What do you see as the biggest challenge facing governing boards and how can CSBA and/or CCBE help address it?

We are doing it:

1. Full and Fair funding. So many of our districts are still in survival mode instead of thriving.
2. Coming together to learn from each other in the ACE and board trainings help board members increase their capacity. Learning about issues like the political climate, how to understand LCAP, and restorative justice make us better board members

We could use some implicit bias training. Learning to work with others that don't share our same values can be difficult.

Submit biographical sketch form only once, do not send multiple times. E-mail: nominations@csba.org, or fax to (916) 371-3407, or US Mail to: CSBA Exec. Office | Attn: DA Elections | 3251 Beacon Blvd., West Sacto, CA, 95691 by Tues. Jan. 7, 2020.

Lucia DeAnda Vázquez

132 East Sweet Avenue, Visalia, CA 93291
(559) 381-1781, luciavisalia58@gmail.com

Employment History

2018- Present	Weaver	Central Valley Equal Voice Network, CA
2014- Present	Consultant/Grant Writer/Facilitator	Organización De Mujeres Unidas, WildPlaces
2012-2013	Community Organizer	Dolores Huerta Foundation, CA
2010-present	Field Interviewer	Mathematica Policy Research, CA, AL
2010	Consultant	Tulare County Dept. of Public Health, CA
2010	Survey Coordinator	UC Cooperative Extension, Tulare County, CA
2000-Present	Field Interviewer	Neilson Media Research, CA, CO, OR, TX
2009-10 & 2014	Onsite Evaluation, Data Collection	UC Berkeley Center for Weight and Health
2006-2008	Teacher Assistant	UC Merced – Literature, Political Science, CA
2005- 2007	Nutrition Program Manager	UC Cooperative Extension, Kings County, CA
2005- 2007	Senior Survey Worker	UC Cooperative Extension, Tulare County, CA
1997-2007	Field Interviewer	Research Triangle Institute, CA
1998- 2005	Program Director	Farmersville Unified School District, CA
1998-2000	Facilitator	United Way of Tulare County, Tulare, CA
1994-1997	Heart Smart Coordinator	Tulare Healthcare District & City of Tulare, CA
1993-1995	Nutrition Educator	UC Cooperative Extension, Tulare County, CA
1992-1993	Long Term Substitute	Long Beach Unified School District, CA

EDUCATION

Mt Whitney High School	1973-1976	High School diploma
Fresno City College	1976-1978	AS
University of San Francisco	1978-1981	BS
Harvard University	Summer 79	Biology
U C San Francisco	1982-1984	Medicine
Cal State Dominguez Hills	Fall 1992	Education
College of the Sequoias	1995-1997	Language. Statistics
UC Merced	2006- 2009	MA: World Cultures History & Literature
Brandman University	2014- 2019	Ed. D.: Organizational Leadership

CERTIFICATIONS:

California Emergency Teaching Credential; Math and Life Science, Certified Massage Technician. *Safe Serv* Certified

LANGUAGES:

English, fluent in Spanish and understand basic American Sign Language.

PROFESSIONAL MEMBERSHIPS

- Visalia Unified School District Board of Education, 2011- 2020, President 2016-2017
- California School Board Association Delegate, 2016 – present
- California Latino School Board Association, Board member 2019 – present
- Tulare County Office of Education Foundation – Director 2017- present
- Visalia Joint facility Use committee – 2017 -current President
- Sierra Health Foundation - Health Leadership Program Class XII, Graduate
- Mujeres Activas in Letras y Cambio Social, MALCS, Women Active in Letters and Social Change
- National Association for Chicano & Chicana Studies
- Tulare League of Mexican American Women, past President
- Visalia Unified School District, Property Committee, PTA, School Site Council
- Hispanic Advisory Committee to the Visalia Police Chief
- Hispanic Round Table and Tulare Kings Hispanic Coalition
- Women's Health Leadership, Graduate

AWARDS

- 2000 Finalist "OUTSTANDING LEADERSHIP AWARD" - Assembly Women Sarah Reyes
- 2005 Recipient "Women Helping Women Award" Sorooptimist International of Visalia
- 2008 Nominee "Outstanding Graduate Student Award" UC Merced
- 2016 Fred Davis Community Recognition Award, Central Committee Democratic
- 2017 "Community ACTivist Award" ACT for Women and Girls
- 2018 Recipient "Women Making History" Latino Police Officers Association

REQUIRES BOARD ACTION

This completed **ORIGINAL** Ballot must be **SIGNED** by the Superintendent or Board Clerk and returned in the enclosed envelope postmarked by the U.S. post office no later than **MONDAY, MARCH 16, 2020**. Only ONE Ballot per Board. Be sure to mark your vote "X" in the box.

A PARTIAL, UNSIGNED, PHOTOCOPIED, OR LATE BALLOT WILL NOT BE VALID.

OFFICIAL 2020 DELEGATE ASSEMBLY BALLOT
SUBREGION 12-A
(Tulare County)

(Vote for no more than 2 candidates)

Delegates will serve two-year terms beginning April 1, 2020 – March 31, 2022

**denotes incumbent*

☐ Peter Lara (Porterville USD)*

☐ Lucia Vazquez (Visalia USD)*

Provision for Write-in Candidate Name

School District

Signature of Superintendent or Board Clerk

Title

School District

Date of Board Action

See reverse side for a current list of all Delegates in your Region.

REGION 12 – 13 Delegates (11 elected/3 appointed ♦)

Director: Bill Farris (Sierra Sands USD)

Below are the current Delegates and their terms (as of January 31, 2020).

Subregion 12-A (Tulare)

Peter Lara, Jr. (Porterville USD), term expires 2020
Cathy Mederos (Tulare Joint Union HSD), term expires 2021
Dean Sutton (Exeter USD), term expires 2021
Lucia Vazquez (Visalia USD), term expires 2020

Subregion 12-B (Kern)

Pamela (Pam) Baugher (Bakersfield City SD), term expires 2021
Cynthia Brakeman (Kern HSD) ♦, appointed term expires 2020
Jeff Flores (Kern HSD) ♦, appointed term expires 2021
Pamela Jacobsen (Standard ESD), term expires 2020
Tim Johnson (Sierra Sands USD), term expires 2021
Geri Rivera (Arvin Union SD), term expires 2021
Lillian Tafoya (Bakersfield City SD) ♦, appointed term expires 2020
Keith Wolaridge (Panama-Buena Vista Union SD), term expires 2021
Vacant, term expires 2020

County Delegate:

Donald (Don) Cowan (Kern COE), term expires 2020

Counties

Tulare (Subregion A)
Kern (Subregion B)