



January 15, 2019



DEHESA

**Regular Governing
Board Meeting**



Agenda

Welcome

Welcome to the meeting of the Dehesa School District Governing Board. Your interest in our school district is appreciated.

Our Governing Board

Our community elects five Board members who serve four-year terms. The Board members are responsible for the overall operation for the school district. Among its duties, the Board adopts and annual budget, approves expenditures, establishes policies and regulations, authorizes employment of all personnel, approves curriculum and textbooks, and appoints the Superintendent.

Cindy White

Mrs. White was first elected to the governing Board in November 2002, re-elected in 2006, 2010, 2014 and 2018. Her current term expires in 2022.

Karl Becker

Mr. Becker was elected to the board in 2010 and reelected in 2014 and 2018. His current term expires in 2022

Christina Becker

Mrs. Becker was first elected to the Governing Board in the year 2014 and reelected in 2018. Her current term expires in 2022.

Mark Zacovic

Dr. Zacovic was first elected to the governing Board in November 2016. His current term expires in 2020.

Karen Kirkpatrick

Mrs. Kirkpatrick was appointed to the governing Board in December 2017 and elected to the Board in 2018. Her current term expires in 2020.

DEHESA SCHOOL DISTRICT

LOCATION & TIME

CLOSED SESSION - 4:00 p.m.

Dehesa School – Room D4

LOCATION & TIME -

OPEN SESSION -5:00 p.m.

Dehesa School - MPR

REGULAR GOVERNING BOARD MEETING

JANUARY 15, 2019

AGENDA

Accommodations: In compliance with the American with Disabilities Act 1990, if you need special assistance to participate in this meeting, please contact the office of the Superintendent at 619-444-2161. Notification of 48 hours prior to the meeting will enable the District to make reasonable arrangements to ensure accessibility to that meeting.

In compliance with Government Code section 54957.5, non-exempt writings that are distributed to a majority or all of the board in advance of a meeting, may be viewed at Dehesa School District, 4612 Dehesa Road, El Cajon, CA 92019, or at the scheduled meeting. In addition, if you would like a copy of any record related to an item on the agenda, please contact Deborah Cagney.

Board of Education agendas and minutes are, by law, public documents. Please note the Dehesa School District posts Board agendas and minutes on the school website; <https://dehesasd.sdcoc.net>.

I. Call to Order

- A. Public Comment on Closed Session Items.

II. Closed Session

- A. PUPIL PERSONNEL MATTERS: The Governing Board will recess to Closed Session to consider pupil personnel matters pursuant to Government Code Section 35146, 72122, and 48918
- B. PERSONNEL MATTERS: The Governing Board will recess to Closed Session to consider personnel matters pursuant to Government Code Section 54957
 - 1. Appointment, Employment, Evaluation of Performance, Discipline, Leaves, or Dismissal of a Public Employee
- C. NEGOTIATIONS: The Governing Board will recess to Closed Session to consider negotiations and related matters pursuant to Government Code 54957.
 - 1. Employee Organizations: DTA, CSEA, and Unrepresented Employees
- D. POTENTIAL LITIGATION: The Governing Board will recess to Closed Session for conference with Legal Counsel regarding Anticipated Litigation-Significant exposure to litigation pursuant to paragraph (2) or (3) of subdivision (d) of Government Code section 54956.9.

- E. REAL PROPERTY: The Governing Board will recess to Closed Session to consider real property pursuant to Government Code 54956.8 (b) (1).

III. Public Meeting

- A. Call to Order and Establishing a Quorum
- B. Closed Session Report of Any Action Taken
- C. Pledge of Allegiance
- D. Agenda Approval

IV. Requests to Address the Board

A. District/Community Organization Reports

- 1. Presentation of Certificates of Election
- 2. 7th Grade Presentation
- 3. Parents' Club – Jade Clark, President
- 4. Dehesa Teacher's Association – Farida Blakey, President
- 5. California School Employees Association #663 – Jackie Finch, President
- 6. Dehesa Charter – Terri Novacek
- 7. Diego Hills Central Charter School – Kevin Ogden
- 8. The Heights Charter School – Diana Whyte
- 9. Inspire Charter & Pacific Coast Academy – Nick Nichols
- 10. Method Schools – Jessica Spallino
- 11. Valiant Charter / California Academy of Sport Science/ University Prep – Justin Schmitt
- 12. Citizen Input

B. Board Input

V. Routine Action Items

The following items are considered by the Superintendent to be of a routine nature and are acted on with one motion. Any recommendation may be removed at the request of any Board Member and placed under new and/or unfinished business.

- A. Approval of Minutes – It is recommended that the board of Trustees approve the minutes of the following meetings:
 - 1. Regular Board Meeting – December 13, 2018.
- B. Approval of Warrants and Purchase Orders – It is recommended that the Board of Trustees approve the commercial warrants and purchase orders as presented.

- C. Conferences and Workshops
 - 1. ACSA Superintendent's Conference.
 - 2. CASBO Annual Conference.

VI. Information & Proposals (Action may be taken)

A. Correspondence:

- 1. Sweetwater Authority letter

B. Report, Information, and Presentations

- 1. Budget Report
- 2. State School Building Report
- 3. Principal's Report
- 4. Enrollment
- 5. Williams Report
- 6. Asbestos Hazard Emergency Response Act 3-Year Re-inspection

C. Discussion

VII. Action Items

A. Public Hearings - None

B. Old Business – None

C. New Business

- 1. The Board will consider approval of the Inspire Charter School Material Revision.
- 2. The Board will consider approval of Contract with Purposeful Play.
- 3. The Board will consider approval of World of Work Grant.
- 4. The Board will consider approval of the 2017-18 Audit Report.

D. Negotiations – None

E. Board Policies

- 1. Updated Board Policies, Regulations and Exhibits BP 4131- 4161.5.

F. Personnel

Certificated:

- 1. Hire a long term substitute effective 12/18/2018 - 06/13/2019.

Classified:

2. Hire an Instructional Aide effective 1/14/2019 - 06/13/2019.

VIII. Advance Planning

A. Next Meeting

1. Regular Board Meeting February 21, 2019. Closed Session at 4:00 p.m.
Open Session at 5:00 p.m.

- B. Agenda Items** – Trustees may request placing items on the next agenda.

IX. Adjournment

Dehesa School District
Board Meeting Amended Minutes
December 13, 2018

I. Call to order

President, Cindy White called the meeting to order at 4:00 p.m. The Board convened into Closed Session

II. Closed Session

III. Public Meeting

The Board reconvened at 5:00 p.m. President, Cindy White called the meeting to order and reported no action was taken in Closed Session. Cindy White led the pledge of allegiance. Christina Becker made a motion to approve the agenda. Seconded by Mark Zacovic. Vote as follows:

Ayes: Cindy White, Mark Zacovic, Christina Becker, Karl Becker, Karen Kirkpatrick

Nays: None

Absent: None

Abstain: None

IV. Annual Board Reorganization

A. Oath of Office – Nancy Hauer administered the Oath of Office to Cindy White, Karl Becker, Christina Becker, and Karen Kirkpatrick who begin their new terms of office.

B. Election of Officers

1. President: Cindy White handed the gavel over to Nancy Hauer. Nancy Hauer called for the nomination of President. Christina Becker nominated Cindy White for President. Seconded by Karl Becker. No other nominations were given. Vote as follows:

Ayes: Cindy White, Mark Zacovic, Christina Becker, Karl Becker, Karen Kirkpatrick

Nays: None

Absent: None

Abstain: None

2. **Vice President:** Nancy Hauer handed the gavel over to elected President, Cindy White. President White called for nominations for Vice President. Christina Becker nominated Mark Zacovic. Seconded by Karen Kirkpatrick. No other nominations were received. Vote as follows:

Ayes: Cindy White, Mark Zacovic, Christina Becker, Karl Becker, Karen Kirkpatrick

Nays: None

Absent: None

Abstain: None

3. **Clerk of the Board:** President White asked for nominations for Clerk of the Board. Christina Becker nominated Karen Kirkpatrick. Seconded by Mark Zacovic. No other nominations were received. Vote as follows:

Ayes: Cindy White, Mark Zacovic, Christina Becker, Karl Becker, Karen Kirkpatrick

Nays: None

Absent: None

Abstain: None

- C. **Regular Meeting Dates 2019:** Christina Becker made a motion to approve the proposed meeting dates for the 2019 calendar year. Seconded by Mark Zacovic. Discussion about the March 14th date and how Karl Becker is not available that day. Possibly will need to change the October 7th date. Vote as follows:

Ayes: Cindy White, Mark Zacovic, Christina Becker, Karl Becker, Karen Kirkpatrick

Nays: None

Absent: None

Abstain: None

V. Requests to Address the Board

A. District/Community Organization Reports

- 1. 6th Grade Thank You:** The 6th grade class thanked Mark Zacovic for his generous donation to the 6th Grade Catalina trip.
- 2. 4th Grade Presentation:** Lee Anne Barbara the 4th grade teacher addressed the Board. There was only one student present due to illnesses in the class. Lee Anne read for the student that was present their Christmas wish writing piece.
- 3. Kirsten Yuhl proposal to Board for books:** Kirsten Yuhl gave a brief overview of the scope and sequence of the lessons. Trajectory classes teach students to adopt and put into action the positive, self-disciplined behaviors needed to achieve their goals. Activities, discussions, projects, and guest speakers are used to help motivate students to adopt positive habits of self-discipline. Would like all middle school students to have the book Sophia the Bionic Cat. The author Sergeant Smith will be speaking to the middle school class on January 24, 2019 and will autograph all the books. Cindy White gave direction to Nancy Hauer to fund Kirsten Yuhl's proposal.
- 4. Parents' Club:** Heather Griffiths spoke on behalf of Parents' Club. They are doing the Santa Secret Shop right now. The Secret Santa Shop is an opportunity for the kids to shop for their families. This year 6th grade is also doing a fundraiser of gift wrapping.
- 5. Dehesa Teacher's Association:** No Report
- 6. California School Employees Association #663:** No report
- 7. Dehesa Charter:** No Report
- 8. Diego Hills Central Charter School:** Nancy Hauer spoke on behalf of Diego Hills Central. Enrollment is at 546 students. They are doing a toy drive and gift donation. Annually, the site gathers donations and gifts to give to students with young children and/or for their young siblings. Students attended a San Diego Regional Field Trip with the counselors to UCSD. Staff were trained about Commercial Sexual Exploitation of Children by Ebony Jones a survivor. Athletic students attended a 12 week seminar class where they learned leadership skills with a collimating project that took them to New York and the Baseball Hall of Fame. Twenty students participated in the first mid-year San Diego Region graduation at the Kroc Center on December 5th.
- 9. The Heights Charter School:** Nancy Hauer spoke on behalf of The Heights

Charter School. Enrollment is at 244 students. Some of the technical workshops that they offer their students are coding, technology, and engineering. They are having a field trip to Legoland this Friday, December 14th. Their students are participating in the classes offered there: Robotics, Simple Machines II, Lego Music Maker, and Build & Tell. Their last day of classes before Winter Break is Thursday, December 20th, 2018. Classes resume on Monday, January 7th, 2019.

10. Inspire Charter & Pacific Coast Academy: Nancy Hauer spoke on behalf of Inspire Charter School – South and Pacific Coast Academy. Inspire Charter School – South has enrollment of 4,493 students. Pacific Coast Academy has enrollment of 3,830 students. On December 3rd, Inspire Charter School -South and Pacific Coast Academy teachers came together to host an Entrepreneur Fair where students were able to sell their own handmade goods.

11. Method Schools: Nancy Hauer spoke on behalf of Method Schools. Enrollment is at 176. Students are completing practice CAASPP testing this week. New Tile courses started including: Anime, Guitar, Robotics, Flag Football, Comic Book Conquerers. Method Schools continues to participate in a variety of service and volunteer projects, including: Beach clean-up, Christmas gift bags and toy drive for Koinina Foster Home, meal preparation and serve for Solutions for Change, family homeless shelter, and ongoing volunteer work at local food pantries. Summer enrollment begins January 28th. They have developed many new enrollment and curriculum tools to scale summer 2019 growth.

12. Valiant Charter/ California Academy of Sport Science/ University Prep: Justin Schmidt spoke on behalf of Valiant Charter/ California Academy of Sport Science and University Prep. **Valiant Academy of Southern California** has an estimated P1 ADA of 3,098. Enrollment continues to grow in Valiant. Valiant has increased local resources for students, including tutoring in small-group and in-person opportunities with credentialed teachers. State testing preparations are underway. I-Ready testing initial window has launched this week. Nearly 20% of students have already tested. We are actively enriching learning experiences and serving our diverse learners through offering enhanced and different curricular and program options. ELAC meetings are underway to support EL students. Offering many field trips such as Legoland, SeaLand Aquarium, Gubler Orchard Farm, Bower's Kids Museum, San Diego Safari Park, Cool Creations, Oceanview Gem Mine, The Living Desert, and Calm Zoo. **California Academy of Sports Science** has estimated P1ADA of 853. We are preparing for the accreditation process/finalization in the coming month(s). State testing

preparations are underway. We are continuing to establish partnerships with community bodies and more nationally recognized entities. ELAC meetings are underway to support EL students. Field Trips include Palm Springs Tram, Civil War, and Riley's Civil War. **University Prep** has estimated P1 ADA of 2,378. Enrollment remains strong and is increasing. We have begun our partnerships with ASU and students are beginning to sign up for Spring semester term. We are still working on finalizing details with Concordia University for dual enrollment opportunities. We have interest from Brandman University to partner together to offer dual enrollment. Students have begun their internal assessments (iReady) to measure academic performance and growth.

13. Citizen Input: None

B. Board Input: Christina Becker said she really enjoyed the Code to the Future Showcase. She said that the presentations were very impressive in all the grades K-8. She wanted to note that there was an issue with slow WiFi in Middle School. Mark Zacovic said that he really enjoyed the *Goldilocks on Trial* play and is looking forward to the Winter Performance on Friday. Karen Kirkpatrick gave an update on the new website. She said that Dominick Avera, Deborah Cagney and herself will be getting trained on using the website next week.

VI. Routine Action Items

Christina Becker made a motion to approve the Routine Action Items. Seconded by Karen Kirkpatrick. Vote as follows:

Ayes: Christina Becker, Mark Zacovic, Karen Kirkpatrick, Cindy White, Karl Becker

Nays: None

Absent: None

Abstain: None

VII. Information & Proposals

A. Correspondence: The Board reviewed the correspondence. Nancy Hauer spoke about the upcoming Code to the Future District Leadership Conference. The Kindergarten Immunization Assessment Report showed that all immunizations have been completed and we are in compliance.

B. Report, Information, and Presentations

- 1. Budget Report:** Anna Buxbaum reviewed the budget numbers with the Board.
- 2. State School Building Report:** Anna Buxbaum said that we ordered curtains through ABC Curtains. There are very limited companies that provide the stage curtains. The new stage curtains will be fully compliant with fire and safety code. Suggestions from Christina Becker: Valance, Flag Posting, Display Cases for the Code 2 the Future Posters.
- 3. Principal's Report:** Heather Griffiths was in attendance and spoke about how we have implemented the whole school morning meetings. According to feedback from Teachers, Parents, and Students, all are enjoying the change and have seen a marked improvement in behavior inside and outside the classroom. Surveys went out to the staff about the all school morning meetings and Heather showed the Board the data from that survey. Heather and Nancy attended the Global Youth Ambassador Educational Summit in China and it was amazing. We will be getting 15 exchange students and 2 teachers from Huzhou Paddington Bilingual School from January 28th-February 7th. An informational letter will be going out to parents and we will be looking for host families for the students. Teachers are participating in Strategic Planning/Improvement Science in Professional Development. The focus is on writing. We are looking at curriculum options in order to schedule possible consultant for the February PD training day. There was a great parent response to the Awards Assembly but, minimal parent response to the Code to the Future Showcase where students presented their projects. Discussed changes with Kevin Weiss from Code to the Future about ways to improve parent participation for Trimester 2 showcase. Santa's Secret Shop is open from December 12-14. Over \$1,000 was made in the first day of shopping. Sixth Grade is doing a fundraiser during the Santa Shop by wrapping the student's gifts for a small fee. The Winter Performance is Friday, December 14, 2018 at 5:30 p.m. Santa will be in attendance and Amy Merriman of Merriman photography will be there to take pictures of families with Santa. Sixth grade will be doing a fundraiser selling hot chocolate, coffee, water, cookies, treats, and apples. The Character education for December is Caring.
- 4. Enrollment:** Nancy Hauer said that enrollment is at 149 students.

VIII. Action Items

A. Public Hearings

- 1. Inspire Charter School Material Revision:** Cindy White opened the Public Hearing for Inspire Charter School Material Revision. There was no public comment and the Public Hearing was closed.

B. Old Business – None

C. New Business

- 1. Renewal of Charter Petition for Inspire Charter School - South:** Mark Zacovic made a motion to approve the Renewal of Charter Petition for Inspire Charter School – South. Seconded by Karen Kirkpatrick. Vote as follows:

Ayes: Cindy White, Mark Zacovic, Christina Becker, Karl Becker, Karen Kirkpatrick

Nays: None

Absent: None

Abstain: None

- 2. Material Revision for Pacific Coast Academy:** Karl Becker made a motion to approve the Material Revision for Pacific Coast Academy. Seconded by Mark Zacovic. Vote as follows:

Ayes: Cindy White, Mark Zacovic, Christina Becker, Karl Becker, Karen Kirkpatrick

Nays: None

Absent: None

Abstain: None

- 3. Contract to Replace Aging Phone System:** Christina Becker made a motion to approve the contract to replace aging phone system. Seconded by Mark Zacovic. Nancy Hauer mentioned that the current system does not support expansions. The new system will have a PA system. Vote as follows:

Ayes: Cindy White, Mark Zacovic, Christina Becker, Karl Becker, Karen Kirkpatrick.

Nays: None

Absent: None

Abstain: None

- 4. GASB 75 Actuarial Valuation for Year Ending June 30, 2018:** Karl Becker made a motion to approve the GASB 75 Actuarial Valuation for Year Ending June 30, 2018. Seconded by Christina Becker. Anna Buxbaum handed out handouts and explained that accrued liability decreased due to negotiated agreement to end early retirement. Vote as follows:

Ayes: Cindy White, Mark Zacovic, Karen Kirkpatrick, Karl Becker, Christina Becker.

Nays: None

Absent: None

Abstain: None

- 5. Contract for Fascia Repair:** Christina Becker made a motion to approve the Contract for Fascia Repair. Seconded by Karen Kirkpatrick. Vote as follows:

Ayes: Cindy White, Mark Zacovic, Karen Kirkpatrick, Karl Becker, Christina Becker.

Nays: None

Absent: None

Abstain: None

- 6. Contract for Landscape Architect:** Christina Becker made a motion to approve the Contract for Landscape Architect. Seconded by Karen Kirkpatrick. Anna Discussed the bids for the landscape architecture. Worked with Tom Silva on the selection of the company to use. Chose a company that was reasonably priced with a project proposal that aligns with the district's vision for the project. The current structure weathered the recent rain storms well but, improvements need to be made. Cindy White said that there should be drought tolerant plants and no topiaries. Tom Silva discussed the possibility of an outdoor classroom thus enhancing the educational value of the projects. Vote as follows:

Ayes: Cindy White, Mark Zacovic, Karen Kirkpatrick, Karl Becker, Christina Becker.

Nays: None

Absent: None

Abstain: None

- 7. 2018-2019 First Interim Report:** Karl Becker made a motion to approve the 2018-2019 First Interim Report. Seconded by Christina Becker. Anna Buxbaum presented the Board with a handout that explained the 2018-2019 First Interim Report. Vote as follows:

Ayes: Cindy White, Mark Zacovic, Karen Kirkpatrick, Karl Becker, Christina Becker.

Nays: None

Absent: None

Abstain: None

D. Negotiations - None

E. Board Policies

- 1. Updated Board Policies, Regulations and Exhibits 4000-4121:** Karl Becker made a motion to approve updated Board Policies, Regulations and Exhibits 4000-4121. Seconded by Karen Kirkpatrick. Vote as follows:

Ayes: Cindy White, Mark Zacovic, Christina Becker, Karl Becker, Karen Kirkpatrick

Nays: None

Absent: None

Abstain: None

F. Personnel

- 1. To Hire a six hour Child Nutrition Aide effective 11/26/2018:** Karen Kirkpatrick made a motion to Hire a six hour Child Nutrition Aide effective 11/26/2018. Seconded by Mark Zacovic. Vote as follows:

Ayes: Cindy White, Mark Zacovic, Christina Becker, Karl Becker, Karen Kirkpatrick

Nays: None

Absent: None

Abstain: None

IX. Advance Planning

A. Next Meeting

1. Next meeting will be January 15, 2019. Closed session at 4:00 p.m. Open Session at 5:00 p.m.

X. Adjournment

Cindy White adjourned the open meeting at 6:20 p.m. and stated that the Board would be reconvening into Closed Session. The Board went back into Closed Session and Reconvened into Open Session at 6:23p.m. President, Cindy White reported that in Closed Session, the Board took action to issue notice of nonreelection to probationary certificated employee Identification Number 601385 pursuant to Education Code section 44921.21, subdivision (b), effective at the end of the 2018-2019 school year, and directed the Superintendent or designee to send out appropriate legal notices. The roll call vote was as follows:

Ayes: Cindy White, Mark Zacovic, Karen Kirkpatrick, Karl Becker, Christina Becker

Nays: None

Absent: None

Abstain: None

Cindy White Adjourned the Open Meeting at 6:25 p.m.

Respectfully Submitted by:

Approved by:

Deborah Cagney
Administrative Secretary

Karen Kirkpatrick
Clerk of the Board

**DEHESA SCHOOL DISTRICT
PURCHASE ORDERS
December 2018**

DATE	PO NUMBER	VENDOR	Description	AMOUNT	BUDGET CATEGORY
12/05/18	7792	VIRCO	Lunch Tables for MPR room	\$ 1,899.60	General Fund
12/05/18	7793	SDCOE	Registration Reproductive Education Curriculum (Lavigne)	\$ 25.00	General Fund
12/10/18	7794	STS Education	Computer Screen Replacement (teacher)	\$ 96.19	General Fund
12/10/18	7795	Lancaster Archery	Archery Equipment	\$ 883.78	General Fund
12/10/18	7796	Amazon	Fan for Restroom	\$ 91.28	General Fund
12/10/18	7797	School Nurse Supply	Nursing Supplies	\$ 380.68	General Fund
12/17/18	7798	AB	MPR Stage Curtains	\$ 4,019.00	Special Resource Fund
12/17/18	7799	BorderLan	Phone System	\$ 10,544.40	Special Resource Fund
12/18/18	7800	EWG	Spirit Wear	\$ 2,173.66	General Fund
12/18/18	7801	ACSA	ACSA Conference	\$ 650.00	General Fund
Total				\$ 20,763.59	

**DEHESA SCHOOL DISTRICT
COMMERCIAL WARRANT LISTING
December 2018**

Date	Warrant ID	Vendor Name	Fund	Invoice	Object Descr	Inv Amount	Warrant Amt
12/3/2018	14482999	CAJON VALLEY UNION SCHOOL DIST	GENERAL FUND	Oct 2018 Bus Maint	Materials And Supplies	868.40	2,224.90
12/3/2018	14482999	CAJON VALLEY UNION SCHOOL DIST	GENERAL FUND	Aug-Sept 2018 Bus Maint	Materials And Supplies	1,356.50	
12/3/2018	14483000	Prevention Partners, Inc.	GENERAL FUND	Drug Free Wristband	Materials And Supplies	53.98	53.98
12/3/2018	14483001	Rosetta Stone Ltd.	GENERAL FUND	Language Lessons	Materials And Supplies	1,209.51	1,509.51
12/3/2018	14483001	Rosetta Stone Ltd.	GENERAL FUND	Language Lessons	Materials And Supplies	300.00	
12/5/2018	14483980	Jaime Martina	CHILD DEVELOPMENT FUND	Student Care Snacks	Materials And Supplies	42.58	42.58
12/5/2018	14483981	MRC SMART TECHNOLOGY SERVICES	GENERAL FUND	IN976862	Materials And Supplies	806.28	806.28
12/5/2018	14483982	School Fix	GENERAL FUND	Logo Mat	Materials And Supplies	316.11	678.10
12/5/2018	14483982	School Fix	GENERAL FUND	Parking Signs/Posts	Materials And Supplies	361.99	
12/5/2018	14483983	Teacher Created Resources	GENERAL FUND	Bulletin Board Supplies	Materials And Supplies	210.57	210.57
12/5/2018	14483984	WASTE MANAGEMENT	GENERAL FUND	December 2018	Operations & Housekeeping	342.73	342.73
12/5/2018	14483985	WAXIE SANITARY SUPPLY	GENERAL FUND	77860406	Materials And Supplies	1,522.00	1,522.00
12/6/2018	14484532	Heather Griffiths	GENERAL FUND	NEU National Conference Reimb	Travel And Conferences	880.76	880.76
12/10/2018	14485624	DAVID BEST	GENERAL FUND	Supplies	Materials And Supplies	298.65	298.65
12/10/2018	14485625	HOLLANDIA DAIRY, INC.	CAFETERIA SPECIAL REVENUE FUND	11.29.18	Food	236.19	469.49
12/10/2018	14485625	HOLLANDIA DAIRY, INC.	CAFETERIA SPECIAL REVENUE FUND	12.06.18	Food	233.30	
12/10/2018	14485626	LYNN'S LOCKSMITH SERVICE	GENERAL FUND	11.30.2018	Materials And Supplies	23.27	23.27
12/10/2018	14485627	PETTY CASH-Deborah Cagney	GENERAL FUND	6.23.18-10.29.18	Postage	46.98	206.72
12/10/2018	14485627	PETTY CASH-Deborah Cagney	GENERAL FUND	6.23.18-10.29.18	Materials And Supplies	121.45	
12/10/2018	14485627	PETTY CASH-Deborah Cagney	CHILD DEVELOPMENT FUND	6.23.18-10.29.18	Materials And Supplies	38.29	
12/10/2018	14485628	SOUTH BAY FENCE INC.	GENERAL FUND	Retention Payment	Land Improvements	17,100.00	17,100.00
12/10/2018	14485629	SOUTHWEST SCHOOL SUPPLY	GENERAL FUND	Goggles & Single Hole Punchers	Materials And Supplies	68.38	68.38
12/11/2018	14486144	CDI Computer Dealers, Inc.	GENERAL FUND	Headphones	Materials And Supplies	599.25	599.25
12/11/2018	14486145	Law Offices of Meagan Nunez	GENERAL FUND	Settlement	Legal Expense	5,000.00	5,000.00
12/11/2018	14486146	VISTA HILL	GENERAL FUND	November	Prof/Consult Srv&Operate Exp	1,417.00	1,417.00
12/14/2018	14488222	A1 LIVESCAN	GENERAL FUND	Diana Hansen	Prof/Consult Srv&Operate Exp	19.00	19.00
12/14/2018	14488223	CDI Computer Dealers, Inc.	GENERAL FUND	Coding Computers	Non-Capitalized Equipment	2,398.00	3,035.87
12/14/2018	14488223	CDI Computer Dealers, Inc.	GENERAL FUND	HDMI (TK teacher)	Materials And Supplies	68.00	
12/14/2018	14488223	CDI Computer Dealers, Inc.	GENERAL FUND	Coding Computers	Non-Capitalized Equipment	569.87	
12/14/2018	14488224	Heather Griffiths	GENERAL FUND	International Cell Service	Travel And Conferences	70.00	70.00
12/14/2018	14488225	HOLLANDIA DAIRY, INC.	CAFETERIA SPECIAL REVENUE FUND	12.13.2018	Food	259.16	259.16
12/14/2018	14488226	The Howard E Nyhart Company Inc	GENERAL FUND	17-18 Actuarial Study	Prof/Consult Srv&Operate Exp	4,750.00	4,750.00
12/14/2018	14488227	SAN DIEGO CTY SPEECH PATHOLOGY	GENERAL FUND	November 2018	Prof/Consult Srv&Operate Exp	3,060.00	3,060.00
12/14/2018	14488228	SAN DIEGO GAS & ELECTRIC	GENERAL FUND	November 2018	Operations & Housekeeping	3,647.05	3,647.05
12/14/2018	14488229	SYCUAN RESORT	GENERAL FUND	October 2018	Materials And Supplies	1,820.00	1,820.00
12/17/2018	14489153	REVOLVING FUND	GENERAL FUND	December 2018	Travel And Conferences	167.96	1,293.33
12/17/2018	14489153	REVOLVING FUND	GENERAL FUND	December 2018	Travel And Conferences	167.96	
12/17/2018	14489153	REVOLVING FUND	GENERAL FUND	December 2018	Materials And Supplies	14.54	
12/17/2018	14489153	REVOLVING FUND	GENERAL FUND	December 2018	Materials And Supplies	86.19	
12/17/2018	14489153	REVOLVING FUND	GENERAL FUND	December 2018	Travel And Conferences	405.55	
12/17/2018	14489153	REVOLVING FUND	GENERAL FUND	December 2018	Travel And Conferences	12.00	
12/17/2018	14489153	REVOLVING FUND	GENERAL FUND	December 2018	Travel And Conferences	19.27	
12/17/2018	14489153	REVOLVING FUND	GENERAL FUND	December 2018	Materials And Supplies	161.96	
12/17/2018	14489153	REVOLVING FUND	GENERAL FUND	December 2018	Materials And Supplies	257.90	
12/18/2018	14489681	Sheila White	GENERAL FUND	Mileage Oct-Dec 2018	Travel And Conferences	55.59	55.59
12/18/2018	14489682	ATKINSON, ANDELSON, LOYA, RUDD	GENERAL FUND	Oct 2018	Legal Expense	3,071.25	3,071.25
12/18/2018	14489683	AB Blinds	GENERAL FUND	Blinds 7780	Buildings&Improvmts Of Builds	1,300.00	1,300.00
12/18/2018	14489684	Anna Buxbaum	GENERAL FUND	SSDA/CBO Symposium Meals	Travel And Conferences	75.00	194.68
12/18/2018	14489684	Anna Buxbaum	GENERAL FUND	Mileage Sept-Oct 2018	Travel And Conferences	56.24	
12/18/2018	14489684	Anna Buxbaum	GENERAL FUND	Mileage Nov 2018	Travel And Conferences	63.44	
12/18/2018	14489685	NANCY HAUER	GENERAL FUND	Negotiation Training Lyft	Travel And Conferences	46.27	46.27

DEHESA SCHOOL DISTRICT
COMMERCIAL WARRANT LISTING
December 2018

Date	Warrant ID	Vendor Name	Fund	Invoice	Object Descr	Inv Amount	Warrant Amt
12/18/2018	14489686	Tom Silva Consulting	GENERAL FUND	October 2018	Prof/Consult Srv&Operate Exp	812.50	2,687.50
12/18/2018	14489686	Tom Silva Consulting	GENERAL FUND	November 2018	Prof/Consult Srv&Operate Exp	1,875.00	
12/18/2018	14489687	HOME DEPOT/GEFC	GENERAL FUND	Supplies	Materials And Supplies	153.47	153.47
12/18/2018	14489688	Verbal Behavior Associates	GENERAL FUND	October 2018	Prof/Consult Srv&Operate Exp	5,457.00	5,457.00
12/19/2018	14490745	Shannon, Angela	GENERAL FUND	CSEA Dues Reimb.	Expenditure Suspense Deductions	12.00	12.00
12/19/2018	14490746	EWG	GENERAL FUND	Spirit Wear	Materials And Supplies	2,173.66	2,173.66
12/19/2018	14490747	OTAY WATER DISTRICT	GENERAL FUND	Dec 2018	Operations & Housekeeping	359.07	359.07
12/19/2018	14490748	XEROX EDUCATION PUBLICATIONS	GENERAL FUND	11.22.18- 12.21.18	Rent,Lease,Repair&Non-Cap Imp	717.62	717.62
12/20/2018	14491714	ATKINSON, ANDELSON, LOYA, RUDD	GENERAL FUND	Nov 2018	Legal Expense	767.97	767.97
12/21/2018	14492497	Hatch & Cesario	GENERAL FUND	September_12133	Legal Expense	1,058.00	1,058.00
12/21/2018	14492498	New York Giant Pizza	CAFETERIA SPECIAL REVENUE FUND	November 2018	Food	432.00	432.00
TOTAL						69,894.66	69,894.66



County of San Diego

MICHAEL VU
Registrar of Voters

REGISTRAR OF VOTERS
County Operations Center Campus
5600 Overland Avenue, Suite 100, San Diego, California 92123-1266

CYNTHIA L. PAES
Assistant Registrar of Voters

Telephone: (858) 565-5800 Toll-free: 1 (800) 696-0136 TDD: (858) 694-3441
Facsimile: (858) 694-2955 Web Address: www.sdvote.com

December 6, 2018

TO: District Secretary/Representative

FROM: Elvira Vargas
Campaign Services

CERTIFICATE OF ELECTION

Enclosed are Certificates of Election for your jurisdiction. Please present these certificates to your elected board members.

If you have questions, please call the Registrar of Voters Office at 858-505-7210.

THANK YOU for your cooperation this year. We appreciate your help and look forward to working together again.

Please confirm that your District has received the certificates Elvira.vargas@sdcounty.ca.gov

Enclosures

Requestor's Responsibility: Obtain Travel Approval, Pre-Register Yourself, Make All Travel Arrangements

DEHESA SCHOOL DISTRICT TRAVEL & CONFERENCE REQUEST FORM

DATE **January 29-February 1**

EMPLOYEE NAME	EE ID #	POSITION	SUBSTITUTE REQUIRED:		FULL DAY(S)	1/2 DAY(S)	SUB COST
			Yes	No			
Nancy Hauer		Superintendent		X	3		N/A

CONFERENCE / WORKSHOP / MEETING INFORMATION			
VENDOR/ORGANIZATION NAME	ACSA		
TITLE	Superintendent's Conference		
LOCATION	Monterey, CA		
DESCRIPTION/BUSINESS PURPOSE	Update on new Governor's budget and various other matters. I have not attended this conference for 3 years.		
DATES	1/29/2019		2/1/2019
OVERNIGHT STAY REQUIRED?	YES		NO

ESTIMATED EXPENSES	QTY	RATE	TOTAL	NOTES/COMMENTS
REGISTRATION FEE(S)	1	\$ 650.00	\$ 650.00	PLEASE ATTACH REGISTRATION INFORMATION
LODGING	3	\$ 201.00	\$ 603.00	
TRANSPORTATION: AIRFARE, BUS, TRAIN		\$ 153.00	\$ 389.00	
MILEAGE (RATE PER MILE \$.545 AS OF 1/1/2018)		\$ 0.545	\$ -	
ENTER NUMBER OF MILES TO BE DRIVEN			\$ -	
RENTAL CAR, CAB/TAXI, SHUTTLE, PARKING, OTHER	Sharing with Mountain Empire		#VALUE!	
MEALS				
BREAKFAST (\$7.00 PER DAY MAX)			\$ -	
LUNCH (\$11.00 PER DAY MAX)			\$ -	
DINNER (\$23.00 PER DAY MAX)			\$ -	
TOTAL			\$ 1,642.00	

BUDGET	
BUDGET	

APPROVED BY (NAME):	<i>Anna Buxbaum</i>	
SUPERVISOR SIGNATURE	<i>Anna</i>	DATE <i>12/18/18</i>

By signing below, I certify the requested travel is appropriate and necessary for conducting official District business, and agree to comply with Board Policy.		
EMPLOYEE SIGNATURE	<i>Nancy Hauer</i>	DATE <i>12/18/18</i>

SUPERINTENDENT SIGNATURE	<i>Nancy Hauer</i>	DATE <i>12-18-18</i>
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Superintendents' Symposium

Event Information



This annual event brings school leaders from around the state together for an invaluable two and a half days of professional learning, networking and advocacy. This is the best time to look at the governor's budget and for superintendents to get together to review the state-of-the-state and the state-of-the-district.

More than ever before it is time for superintendents to lead a movement to restore California schools to their once-held rank of the best in the nation. A focus will be on integrating technology into curriculum and professional development in a digital world.

REGISTER NOW ([HTTP://WWW.CVENT.COM/D/QTQ5XD/4W](http://www.cvent.com/d/qtq5xd/4w))

Jan. 29 - Feb. 1, 2019
Monterey Conference Center

Registration Fees:

Superintendent:

ACSA Member: \$650 | Non-Member: \$999

Retired Superintendent:

ACSA Member: \$325 | Non-Member: \$525

Registration Fees Include:

- Attendance to all educational activities, Wednesday through Friday
- Lunch and Reception on Wednesday and Thursday
- Breakfast on Friday

Leave a message



Upcoming Dates & Locations

2020: Jan. 29-31 | Hyatt Regency, Indian Wells, CA

2021: Jan. 27-29 | Monterey Conference Center, CA

More learning opportunities like this...

Summer Residential Programs at UCLA (<https://www.acsa.org/Professional-Learning/Conferences/summerprograms>)

Every Child Counts Symposium (<https://www.acsa.org/Professional-Learning/Conferences/every-child-counts-symposium>)

Women in School Leadership Forum (<https://www.acsa.org/Professional-Learning/Conferences/womensforum>)

(tel:8006082272)

Quick Links

 Shop (<http://shop.acsa.org>)  Catalog (<https://www.acsa.org/About-Us>)  About Us (<https://www.acsa.org/About-Us>)

Follow Us On

 Facebook (<https://www.facebook.com/acsafaculty>)  Twitter (<https://twitter.com/acsafaculty>)  LinkedIn (<https://www.linkedin.com/company/association-of-collegiate-school-administrators>)  YouTube (<https://www.youtube.com/channel/UCa1fmg>)

Latest Tweets

Leave a message





ACSA

@ACSA_info

thecoastnews.com/school-board-h...

1h



ACSA

@ACSA_info

Tulare County welcomes new Superintendent of Schools
visaliatimesdelta.com/story/news/201... via @vtdnews

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(<http://www.schoolcity.com>)

Powered by SchoolCity.

Leave a message



Requestor's Responsibility: Obtain Travel Approval, Pre-Register Yourself, Make All Travel Arrangements

DEHESA SCHOOL DISTRICT TRAVEL & CONFERENCE REQUEST FORM

DATE

EMPLOYEE NAME	EE ID #	POSITION	SUBSTITUTE REQUIRED:		FULL DAY(S)	1/2 DAY(S)	SUB COST
			Yes	No			
Anna Buxbaum	452095	Business Manager		X	3		

CONFERENCE / WORKSHOP / MEETING INFORMATION				
VENDOR/ORGANIZATION NAME	CASBO			
TITLE	Annual Conference			
LOCATION	San Diego Convention Center			
DESCRIPTION/BUSINESS PURPOSE	CASBO 2019 Annual Conference & CA School Business Expo. Opportunity to attend a choice of approximately 150 workshops related to school business.			
DATES	TO	4/16/19	FROM	4/18/19
OVERNIGHT STAY REQUIRED?	YES		NO	X

ESTIMATED EXPENSES	QTY	RATE	TOTAL	NOTES/COMMENTS
REGISTRATION FEE(S)	1	\$ 795.00	\$ 795.00	PLEASE ATTACH REGISTRATION INFORMATION
LODGING	0	\$ -	\$ -	
TRANSPORTATION: AIRFARE, BUS, TRAIN	0		\$ -	
MILEAGE NUMBER OF MILES	138.6	\$ 0.580	\$ 80.39	
(RATE PER MILE \$.58 AS OF 1/1/2019)			\$ -	
RENTAL CAR, CAB/TAXI, SHUTTLE, PARKING, OTHER	3	\$ 30.00	\$ 90.00	Parking
MEALS				
BREAKFAST (\$7.00 PER DAY MAX)		\$ 7.00	\$ -	
LUNCH (\$11.00 PER DAY MAX)	3	\$ 11.00	\$ 33.00	
DINNER (\$23.00 PER DAY MAX)		\$ 23.00	\$ -	
TOTAL			\$ 998.39	

BUDGET	Special Reserve Fund
BUDGET	

APPROVED BY (NAME):	Nancy Hauer	
SUPERVISOR SIGNATURE		DATE 1/8/19

By signing below, I certify the requested travel is appropriate and necessary for conducting official District business, and agree to comply with Board Policy.		
EMPLOYEE SIGNATURE		DATE 1/8/19

SUPERINTENDENT SIGNATURE		DATE 1/8/19
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Requestor's Responsibility: Obtain Travel Approval, Pre-Register Yourself, Make All Travel Arrangements

DEHESA SCHOOL DISTRICT TRAVEL & CONFERENCE REQUEST FORM


DATE

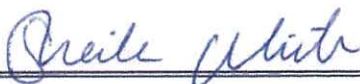
EMPLOYEE NAME	EE ID #	POSITION	SUBSTITUTE REQUIRED:		FULL DAY(S)	1/2 DAY(S)	SUB COST
			Yes	No			
Sheila White	601560	Bus. Services Specialist		X	3		


CONFERENCE / WORKSHOP / MEETING INFORMATION				
VENDOR/ORGANIZATION NAME	CASBO			
TITLE	Annual Conference			
LOCATION	San Diego Convention Center			
DESCRIPTION/BUSINESS PURPOSE	CASBO 2019 Annual Conference & CA School Business Expo. Opportunity to attend a choice of approximately 150 workshops related to school business.			
DATES	TO	4/16/19	FROM	4/18/19
OVERNIGHT STAY REQUIRED?	YES		NO	X

ESTIMATED EXPENSES	QTY	RATE	TOTAL	NOTES/COMMENTS
REGISTRATION FEE(S)	1	\$ 795.00	\$ 795.00	PLEASE ATTACH REGISTRATION INFORMATION
LODGING	0	\$ -	\$ -	
TRANSPORTATION: AIRFARE, BUS, TRAIN	0		\$ -	
MILEAGE NUMBER OF MILES	138.6	\$ 0.580	\$ 80.39	
(RATE PER MILE \$.58 AS OF 1/1/2019)			\$ -	
RENTAL CAR, CAB/TAXI, SHUTTLE, PARKING, OTHER	3	\$ 30.00	\$ 90.00	Parking
MEALS				
BREAKFAST (\$7.00 PER DAY MAX)		\$ 7.00	\$ -	
LUNCH (\$11.00 PER DAY MAX)	3	\$ 11.00	\$ 33.00	
DINNER (\$23.00 PER DAY MAX)		\$ 23.00	\$ -	
TOTAL			\$ 998.39	

BUDGET	Special Reserve Fund
BUDGET	

APPROVED BY (NAME):	Anna Buxbaum	
SUPERVISOR SIGNATURE		DATE 1/8/19

By signing below, I certify the requested travel is appropriate and necessary for conducting official District business, and agree to comply with Board Policy.		
EMPLOYEE SIGNATURE		DATE 1/8/19

SUPERINTENDENT SIGNATURE		DATE 1-8-19
--------------------------	---	-------------

CASBO: Cultivating Connections in School Business Starts Here!

The human brain is wired to connect. In fact, the science of connection shows that how connected you are is directly relevant to your overall wellness. Those with close professional or personal ties to others have a sense of safety and support. Those who try to go it alone often feel isolated and without a trusted confidante.

That's why it's more important than ever to get to the premier event for cultivating connections in school business – the CASBO 2019 Annual Conference & California School Business Expo, April 15-18 in San Diego.

That's where you'll find hundreds of opportunities to take all the steps involved in cultivating connections: collaborating, communicating and creating. And you'll do it alongside the smartest minds in the school business industry.

CASBO 2019 features the nation's most engaging keynote speakers, over 150 professional development sessions and dozens of career-advancing and networking opportunities.

Throughout conference, you'll learn from state and national education experts, have a chance to re-connect with your personal and professional networks, and learn about the amazing work of your colleagues in school business.

And because we always want to provide as many opportunities as possible to collaborate, communicate and create, you'll find a variety of learning formats, including partner-hosted events, professional growth seminars, networking mixers and best-practices workshops. We think your creativity will really be sparked at the Fourth Annual "Battle of the Sections" Lip Sync Contest, back by popular demand.

Finally, some serious connection curation is sure to happen at the California School Business Expo where as many as 300 vendors will share the innovative education solutions they've created. The Expo is literally the largest of its kind in California – and *the* place to see what's up, what's new and what new product or service might benefit your local education agency (LEA).

And it all takes place in gorgeous San Diego, a favorite location for conference attendees thanks to the Gas Lamp District, sporting events, beaches and spectacular weather!

Join us in San Diego this April. Register today to ensure you're continuing to cultivate top-notch connections in school business!



A Message From CASBO's President



Research proves that connecting with others is not only critical for a successful career, it improves our moods and our physical health. This is huge.

That's why I'm excited about the CASBO 2019 Annual Conference & California School Business Expo and our main theme of "Cultivating Connections." Conference is the single best place for school business leaders to cultivate connections, and I can point to three ways this happens – through collaboration, communication and creation!

At CASBO 2019 the opportunities to collaborate abound, whether they're with peers, old friends or subject-matter experts. They'll all be there. You can also leverage conference as an opportunity to communicate – perhaps about your knowledge of a critical topic, your LEA's big idea, or even about what you'd like to learn from others.

And at CASBO 2019 you *can* create ... new relationships, new work strategies, new ways of thinking.

These are just a few of the reasons I'm encouraging you to join us in San Diego this April. At conference, you'll find hundreds of sessions to advance your professional development, a variety of networking events to connect you to like-minded leaders and multiple opportunities to grow your career. At the California School Business Expo, you'll meet up to 300 exhibitors who are ready to collaborate on solutions, communicate about the latest tools and co-create the resources you need to do your job better.

Our Annual Conference Committee and Annual Conference Volunteer Task Force also focused on cultivating connections as they planned this unique learning experience for you. This registration guide will help you discover all the ways you can form connections that are sure to advance your career and enhance your leadership.

See you in San Diego!

Christina Aguilar
President



CASBO
Annual
Conference 2019
& California School Business Expo
Cultivating Connections
Collaborate • Communicate • Create

Conference Registration Information

Register for Annual Conference Online at casbo.org/AC2019

For Employee Members and Associate Members*

If registered on or before **January 11, 2019**: \$795 – 3 Day

If registered after **January 11, 2019**: \$895 – 3 Day

Single-day registration: \$515 – 1 Day

For Career Builder Members

If registered on or before **January 11, 2019**: \$1,015 – 3 Day

If registered after **January 11, 2019**: \$1,115 – 3 Day

Single-day registration: \$565 – 1 Day

For Retiree Members

If registered on or before **March 22, 2019**: \$200

For Non-Members

All registrations: \$1,165 – 3 Day

Single-day registration: \$615 – 1 Day

Registration Package Includes

- Attendance at all General Sessions
- More than 150 workshop sessions
- Tuesday evening California School Business Expo Grand Opening Reception
- Tuesday evening New Professionals Mixer
- Tuesday night Dance & Social Event
- Wednesday evening Associate Member-hosted Hospitality Suites
- Wednesday night Gala Cabaret & Casino

**Non-Associate and Associate Members who are 2019 exhibitors are eligible to attend any non-ticketed conference event at no additional cost.*

*Non-Associate Members who are **NOT** 2019 exhibitors and who are eligible to purchase a CASBO associate membership may **NOT** attend conference in any capacity. For more information about associate membership, please visit casbo.org > **Join** > **Associate**.*

PLEASE NOTE:

This year, Annual Conference will be held Monday through Thursday, not Wednesday through Saturday, as in years past.

Ticketed Items

- Professional Council Lunches: \$60 each
- Third General Session Luncheon: FREE* with full early-bird registration

**If you do not register during the early-bird period, you must purchase a separate ticket for the Third General Session Luncheon. Tickets for Professional Council Lunches and the Third General Session Luncheon may be purchased separately. We strongly recommend that you obtain your tickets in advance as onsite purchase of tickets for these events is limited and based on availability.*

Important Dates

January 11, 2019: Early-bird registration deadline

March 22, 2019: Registration deadline

March 29, 2019: Cancellation deadline

After March 22, 2019, only onsite registration is available and includes increased fees as follows:

\$1,165 for full conference attendance for members, non-members and retired members.

Attendees must be paid members prior to registration to enjoy member discounts. Before you register, join or renew on our website at casbo.org > **Join**.



Register by January 11 for early-bird savings!



Please Read – Important Information and Helpful Hints for Registering

Guests

- You may register a guest at no additional charge if eligible.
- Ineligible guests include anyone (even a spouse of a member) who is eligible to purchase a CASBO membership.

Confirmations

- For any registrations other than late/onsite registrations, CASBO will send you an email confirming registration fees and any additional ticketed items purchased, as well as your unique attendee QR code required for check-in.
- You must bring your printed confirmation email with you or have it available on your mobile device when you check in at registration.

Onsite Registration

- If you miss both the **January 11** early-bird registration deadline and the regular **March 22** registration deadline, you may still attend.
- Register onsite at the San Diego Convention Center, but remember that increased fees will apply, and space may be limited.
- Onsite registration must be accompanied by payment via any of the methods described below.

Method of Payment

- Register with a purchase order; check; or credit card (we accept Visa, MasterCard, Discover and American Express). *All invoices are due net 30 days from date of registration.*
- Checks must be delivered to CASBO; we will not accept faxed copies of checks as registration.
- We regret that we are unable to accept cash payments of any kind.

Returns and Refusals

- CASBO will assess a \$25 fee for any check returned by the bank.
- CASBO will not process registration on credit cards declined by the bank, and you will be notified of the problem.

Cancellations

- **Cancellation requests must be in writing and will require a fee.** Registrants must email cancellation requests to cancel@casbo.org no later than **5:00 p.m. on March 29, 2019**.
- CASBO charges \$150 for each cancellation. To waive the cancellation fee, a registrant may transfer his/her registration to another individual, provided he/she does so prior to March 29, 2019. Thereafter, registration transfers are not permitted.
- There are no refunds for no-shows on the conference start date or for cancellation requests received after March 29, 2019.
- CASBO reserves the right to cancel Annual Conference in case of a catastrophic natural event, such as earthquake, flood, fire, etc. If CASBO cancels Annual Conference due to such an event occurring in nature, registrants will receive a full refund.

If you have any questions or concerns about online registration, please call us at (916) 447-3783.

NEW FOR 2019!
ExpressPass™ Self-Service Check-In for Pre-Registered Attendees. Skip the long lines this year! Visit our self-service kiosk to check into conference **and** print your badge & event tickets automatically!



Hotel Reservation Information



Hotel Reservation Information

These are the hotels with which CASBO has negotiated a discount rate. If you require accommodations, please contact a hotel directly by calling the number listed or by clicking on the link provided.

In some cases, certain nights may already be sold out (especially the first night of your stay). During your search, if the date range you select returns a “no lodging available” result, try adjusting your dates on either end of your range.

If you are unable to get the lodgings you want at a CASBO-contracted hotel, there are others available in the area. For alternate accommodations, please consult your travel agent or use an online search engine such as hotels.com or kayak.com.

Manchester Grand Hyatt San Diego

1 Market Place, San Diego, CA 92101, (619) 232-1234

Ask for the CASBO discount room rate of **\$259*** per night (single or double bed).

You may also reserve your room online at: <http://bit.ly/Hyatt2019AC>

** Discount room rate deadline is **March 14, 2019**, or until the group block is sold out, whichever comes first. A non-refundable one night's room and tax deposit are required at the time of booking for each reservation.*

Manchester Grand Hyatt

Available Dates:

April 16, 2019

April 17, 2019

April 18, 2019

Embassy Suites San Diego Bay Downtown

601 Pacific Highway, San Diego, CA 92101, (619) 239-2400

Ask for the CASBO discount room rate of **\$205*** per night (king or two double bed).

You may also reserve your room online at: <http://bit.ly/Embassy2019AC>

** Discount room rate deadline is **March 15, 2019**, or until the group block is sold out, whichever comes first. A non-refundable one night's room and tax deposit are required at the time of booking for each reservation.*



WATCH FOR UPDATES!

CASBO will provide ongoing conference updates. Check your inbox and our website at casbo.org.

Welcome, First-Time Attendees



We're Glad You're Joining Us in San Diego!

Again this year, we've created a special meeting spot just for our conference first-timers: **the Epicenter, located at the San Diego Convention Center.**

Come and check out the CASBO 2019 Annual Conference & California School Business Expo and meet other newbies. Stop by for a chance to network and meet staff members and volunteers who are eager to answer questions and provide guidance for navigating your first conference.

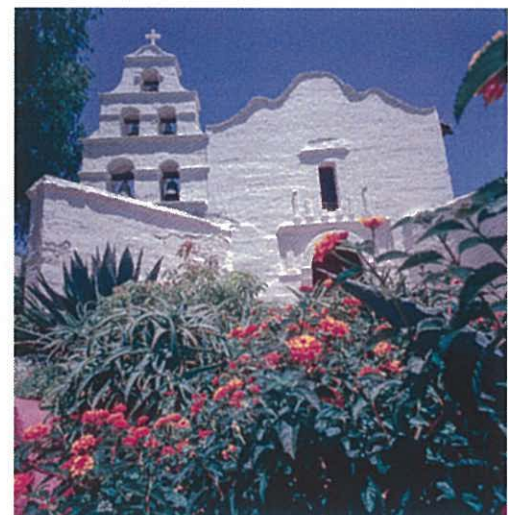
Tuesday, April 16, Through Thursday, April 18

Pop by the Epicenter first thing in the morning (7:30 – 8:30 a.m.) to meet up and chat with other first-time attendees and some regulars before heading to morning workshops or the General Sessions. Our staff and volunteers want to help you navigate conference as easily as possible; we'll frequent this lounge throughout the day to answer your questions and help you map out your day!

Who Should Attend Annual Conference?

Chief business officials	Superintendents
Department directors	Department supervisors
Auditors and controllers	Purchasing and procurement agents and staff
Risk managers and safety officers	Police chiefs and security personnel
Accountants and budget managers	Special education staff
Printing managers and staff	Nutritionists and food service staff
School board members	Business clerical staff
District attorneys and negotiators	Facility planners and engineers
Maintenance and operations staff	Transportation officials
Community college staff	Charter school staff
Confidential employees	School principals and ASB advisors
Personnel officers and staff	MIS and technology staff
Lobbyist and public information staff	Payroll professionals
Webmasters and web designers	Anyone involved in school business!

Get your early-bird savings!
Register by January 11, 2019.



WANT A MEMBER DISCOUNT?

Remember to join or renew before registering.
Visit our website at casbo.org > Join.

Professional Development Opportunities

CASBO Offers an Abundance of Opportunities

California School Business Expo

This year's Expo will take place at the San Diego Convention Center, and our Grand Opening Reception on Tuesday, April 16, will include approximately 300 exhibitors who will offer the latest products, services and information in their respective specialties and areas, as well as a variety of food and beverages, all compliments of the exhibiting companies.

Professional networking opportunities will be expanded on the exhibit floor on Tuesday, April 16, from 5:30 p.m. – 7:30 p.m., and again on Wednesday, April 17, from 10:00 a.m. – 4:00 p.m. The Expo will be closed for lunch from 12:15 p.m. – 1:30 p.m. We will have designated expo hours again this year on Wednesday, April 17, from 1:45 p.m. – 3:45 p.m., during which time no workshops will be in session.

Career-Focus Lunch – RETURNING FOR A THIRD YEAR!

Back by popular demand is our career-focus lunch. Join us at the Manchester Grand Hyatt San Diego on Wednesday, April 17, and make plans to grow your career with an informative lunch session that also provides a great way to network with your colleagues at conference this year! As this booklet goes to press, we're still developing the topic, so be sure to watch your inbox and check our website for updates.

Continuing Education Units/Certification Renewal

All sessions at Annual Conference qualify for continuing education units (CEUs), which are expressed in measurements of one (1) unit per hour of instruction. (Workshops count as 0.75 hour; General Sessions count as 1.5 hours.) Within 60 days after close of conference, CASBO will email a general statement of attendance to all attendees and enter into their CASBO online profiles the number of CEUs awarded (up to a maximum of 10). Annual Conference CEUs may be used to renew a CASBO certification; to verify CEUs received per each session attended, please submit with your renewal application the self-certification verification form (available at casbo.org > Resources > Forms/Applications).

General Sessions

Our General Session speakers were carefully chosen to offer CASBO members a blend of current trends, inspiration and motivation to help you in your daily lives, both in and out of the office. Please refer to pages 14-16 for complete descriptions of the General Sessions. The First and Second General Sessions will take place at the San Diego Convention Center, beginning at 9:15 a.m. on Tuesday, April 16, and Wednesday, April 17, respectively. This year, CASBO also continues its tradition of the Third General Session Luncheon, "The Future of California's Education Economy – The 2019 CASBO Economic Summit," beginning at noon on Thursday, April 18, at the Manchester Grand Hyatt. This is a ticketed function that is included in the price of your early-bird registration. Attendees who do not register prior to the early-bird deadline must purchase a separate ticket.

Partner-Presented School Business Best Practices Workshops – BACK BY POPULAR DEMAND!

CASBO has 33 year-round partners who play a critical role within our network, building strong, lasting business partnerships with California's K-14 decision makers. These companies are committed to providing solutions to the challenges you face in school business, and they are once again stepping forward to serve as your "thought leaders" at conference this year and share valuable information to enhance your professional development. Look for workshop descriptions under the category "School Business Best Practices" which appear later in this registration booklet.

Professional Council Lunches

This year, CASBO's Professional Council members have planned several lunch sessions to be held at the Manchester Grand Hyatt San Diego. These lunch sessions will cover many school business disciplines, including chief business officials, child nutrition, human resources, maintenance & operations, payroll, purchasing, and risk management.

Professional Council Workshops

Each year, CASBO solicits proposals for new and innovative workshops from our members with the goal of adding value to conference and providing attendees with additional opportunities



SWEETWATER AUTHORITY

505 GARRETT AVENUE
POST OFFICE BOX 2328
CHULA VISTA, CALIFORNIA 91912-2328
(619) 420-1413
FAX (619) 425-7469
<http://www.sweetwater.org>

GOVERNING BOARD

STEVE CASTANEDA, CHAIR
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JERRY CANO
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HECTOR MARTINEZ
ALEJANDRA SOTELO-SOLIS

TISH BERGE
GENERAL MANAGER

JENNIFER H. SABINE
ASSISTANT GENERAL MANAGER

January 3, 2019

Dear Property Owner:

Our records indicate that your property is within the 100-year flood plain of the Sweetwater River. This letter is to inform you that Sweetwater Authority (Authority) may conduct a controlled release of water from Loveland Reservoir into the Sweetwater River channel sometime between now and March 31, 2019. The release will transfer water from Loveland Reservoir to Sweetwater Reservoir for use by Authority customers. The transfer will last approximately three to four weeks. The Authority will monitor flows in the river during the transfer, and adjust the rate of release to balance with natural flows in the river to minimize potential high water impacts. No releases are expected after March 31, 2019.

As a precaution, the Authority recommends that you inspect your property, relocate any equipment, material, or livestock in the floodway, and clean all critical culverts as soon as possible. Your efforts to clear the river channel and floodway of obstructions will reduce the possibility of damage to your property, as well as to neighboring properties.

If you have any questions regarding this matter, please contact Mr. Erick Del Bosque at (619) 409-6752, or edelbosque@sweetwater.org.

Sincerely,

SWEETWATER AUTHORITY

Jennifer H. Sabine
Assistant General Manager

DEHESA SCHOOL DISTRICT

To: Members of the Board
and Supt. Nancy Hauer

From: Anna Buxbaum
Business Manager

Subject: Monthly Budget Update

Meeting Date: January 15, 2019

- Action
- First Reading
- Information
- Presentation
- Discussion
- Public Hearing
- Roll Call Vote Required

Background:

At the October 20, 2011 Board Meeting, Members were asked about their preferences for monthly budget updates. Consensus was that a statement of fund balances and clear, concise updates on key issues would be preferred during months falling in-between major reports.

Report:

Attached are 1) Fund balances (Cash in County Treasury), 2) Construction expenditure reports for the Bond and Developer Fee Funds

Financial Impact:

N/A-Form Informational Purposes Only

Student Impact:

NA – For Informational Purposes Only

Recommendation:

NA – For Informational Purposes Only

Dehesa School District

Fund Balances

(Cash in County Treasury as of December 20, 2018)

FUND	DESCRIPTION	BALANCE
01-00	GENERAL FUND	2,093,716.55
09-00	CHARTER SCHOOLS SPECIAL REVENUE FUND (FD 39)	131,915.58
12-06	CHILD DEVELOPMENT FUND	14,025.30
13-00	CAFETERIA SPECIAL REVENUE FUND	17,669.22
17-42	SPECIAL RESOURCE FUND (CHARTER OVERSIGHT)	1,621,497.60
20-00	SPECIAL RESERVE OPEB/RETIREE BENEFITS FUND	770,865.40
25-19	CAPITAL FACILITIES/SB2068 FUND	20,636.35
40-00	SPECIAL RESERVES/CAPITAL PROJECTS	250,351.89
	GRAND TOTAL	\$4,920,677.89

Please note that cash balances in the General Fund fluctuate on a regular basis. This is a normal feature of the fluid budget/accounting process.

**Dehesa School District
Capital Facilities Funds 25-19**

12/31/2018

Current Year Project Activity			Revenue Amount
7/1/2018	Beginning Fund Balance		19,273.03
7/1/2018	Interest	2017-18 4th Qtr Interest	28.02
8/28/2018	Developer Fees	Residential Developer Fees	1,956.00
9/29/2018	Interest	2017-18 4th Qtr Interest - 2nd Distribution	61.48
10/29/2018	Interest	2018-19 1st Qtr Interest	20.32
12/20/2018	Interest	2018-19 1st Qtr Interest - 2nd Distribution	77.01
TOTAL CURRENT YEAR REVENUE			\$ 21,415.86
Payment Date	Service Provider	Services Performed	Expenditure Amount
10/4/2018	School Facility Consultants	State Bond Allocation Consultation	702.50
TOTAL CURRENT YEAR EXPENSES			\$ 702.50
TOTAL FUNDS AVAILABLE AS OF 12/31/2018			\$ 20,713.36

**Dehesa School District
Building Fund 21-39**

12/31/2018

Date			Revenue Amount
7/1/2018	Beginning Balance		\$2,825.30
7/25/2018	Interest	2017-18 4th Qtr Interest - 2nd Distribution	\$119.30
8/2/2018	Interfund Transfer	Return of Temporary Cash Flow Tranfser to General Fund	-\$2,700.00
TOTAL			\$244.60
Payment Date	Service Provider	Services Performed	Expenditure Amount
7/23/2018	Acculine Surveys	Property Survey	\$1,200.00
8/2/2018	Acculine Surveys	Reclass To General Fund	-\$1,200.00
9/11/2018	Fund Closing Entry	Restatement of Interest to General Fund to Close Account	\$244.60
TOTAL CURRENT YEAR EXPENSES			\$244.60
TOTAL FUNDS AVAILABLE AS OF 12/31/2018			\$0.00

DEHESA SCHOOL DISTRICT

To: Members of the Board
From: Nancy Hauer
Subject: Dehesa School Enrollment
as of January 15, 2019

- Meeting Date: January 15, 2019
- Action
 - First Reading
 - Information
 - Presentation
 - Public Hearing
 - Roll Call Vote Required
 - Discussion

Enrollment
Jan. 15, 2019

By Grade Level

EAK/TK.....	12
Kindergarten.....	16
1st Grade.....	17
2nd Grade.....	16
3rd Grade.....	17
4th Grade.....	17
5th Grade.....	17
6th Grade.....	18
7th.....	14
8th.....	13
	157

Enrollment
Jan. 18, 2018

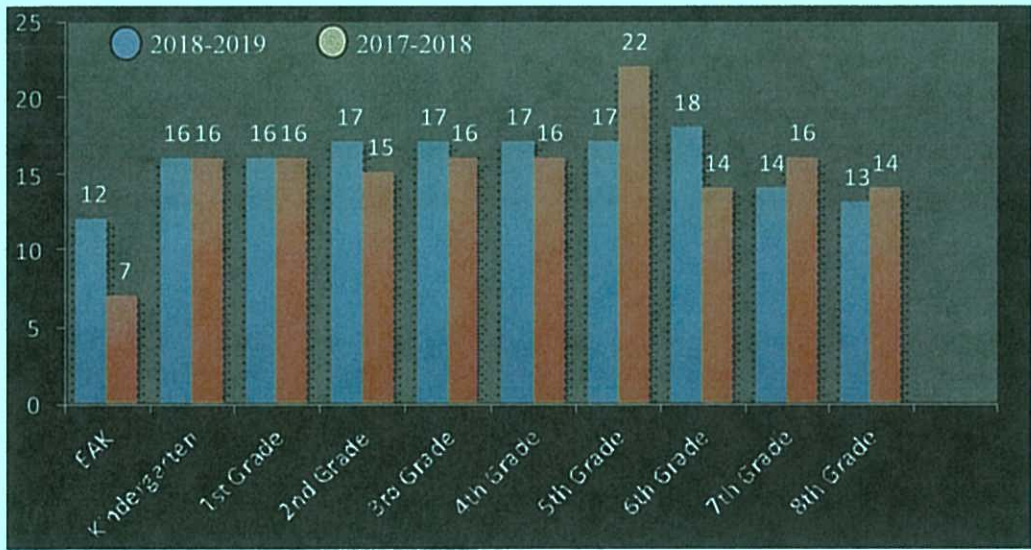
By Grade Level

EAK/TK.....	7
Kindergarten.....	16
1st Grade.....	16
2nd Grade.....	15
3rd Grade.....	16
4th Grade.....	16
5th Grade.....	22
6th Grade.....	14
7th.....	16
8th.....	14
	152

Inter District
Transfers

Students who live in our
District but attend a
different school
56

Students who live in
another district but attend
our school
70



DEHESA SCHOOL DISTRICT

To: Members of the Board

From: Nancy Hauer

Subject: Williams Quarterly
Complaint Report

Meeting Date: January 15, 2019

- Action
- First Reading
- Information
- Presentation
- Discussion
- Public Hearing
- Roll Call Vote Required

Background: Laws and board policy require a quarterly report to the Board of Trustees and the County Superintendent of Schools regarding complaints to the school covered under the Williams Settlement

Report: We received no complaints during the second quarter of the 2018-2019 school year in the areas which are addressed by the Williams Settlement.

Financial Impact: None

Student Impact: None

Agenda Item #: VI.B.5

Dehesa Elementary Williams UCP Quarterly Reporting

• **Quarter 1:** 07/01/2018 - 09/30/2018 **Report Due:** 10/01/2018 - 10/31/2018

• **Quarter 2:** 10/01/2018 - 12/31/2018 **Report Due:** 01/01/2019 - 01/31/2019

• **Quarter 3:** 01/01/2019 - 03/31/2019 **Report Due:** 04/01/2019 - 04/30/2019

• **Quarter 4:** 04/01/2019 - 06/30/2019 **Report Due:** 07/01/2019 - 07/31/2019

• **IM:** Instructional Material

• **F:** Facilities

• **MA:** Misassignment

+ ADD NEW RECORD EXPORT TO EXCEL

Report Date	Quart...	IM Re...	IM Re...	IM U...	F Rec...	F Res...	F Untr...	MA...	MA R...	MA U...	Reporter	Report
01/02/2019	2	0	0	0	0	0	0	0	0	0	Debbie Cagney	Report EDIT
10/02/2018	1	0	0	0	0	0	0	0	0	0		Report
07/09/2018	4	0	0	0	0	0	0	0	0	0		Report
04/09/2018	3	0	0	0	0	0	0	0	0	0		Report
01/03/2018	2	0	0	0	0	0	0	0	0	0		Report
10/03/2017	1	0	0	0	0	0	0	0	0	0		Report
07/06/2017	4	0	0	0	0	0	0	0	0	0		Report

DEHESA SCHOOL DISTRICT

To: Members of the Board
From: Nancy Hauer
Subject: Asbestos Hazard
Emergency Response Act
(AHERA) 3 year
reinspection

Meeting Date: January 15, 2019

- Action
- First Reading
- Information
- Presentation
- Discussion
- Public Hearing
- Roll Call Vote Required

Background: Every three years after implementation of a management plan, an accredited inspector must conduct a re-inspection of all friable and non-friable known or assumed ACM in every school building in order to determine if there has been any change in the condition of the ACM. An accredited management planner must then review the re-inspection report to identify any new hazard potential and revise the management plan to address newly identified hazards. Based on the updated data, new response actions to address these hazards must be selected, and these actions must be carried out in a timely manner.

Report: Our school was re-inspected for all friable and non-friable ACM as required by the Asbestos Hazard Emergency Response Act (ADHERA) 40CFR 763.88. The re-inspection consisted of visual and tactile examination and assessment of all ACM in accessible areas of our school facility. Physical assessment data was obtained throughout the facility for all known homogenous areas and functional spaces for all materials deemed to be friable or likely to become friable. All facility re-inspections, taking samples, and physical assessments were conducted by an accredited inspector according to the requirements of ADHERA, Section 763.88. I am pleased to report that Dehesa has a good rating on all areas inspected.

Financial Impact: \$975.00

Student Impact: The safety and security of our students is our number one priority. Facilities that are free from asbestos are imperative.

Recommendation: This is for information only.

Agenda Item #: VI.B.6

Dehesa Elementary School District

8/29/18

Asbestos Hazard Emergency Response Act (AHERA) 3-Year Re-inspection

Prepared By:

David Christy
Certified Asbestos Consultant
CAC# 92-0703

Western Environmental & Safety Technologies LLC

☎ Tel: (858) 271-1842 (office)

☎ Tel: (619) 571-3987 (cell)

☎ FAX: (858) 271-1856

✉ Email: gowestdc@msn.com

The assessments made within this 3-year report are based on original AHERA management plan documentation and also field assessments and assumption made by the WEST on-site certified inspector.

No bulk sampling was conducted as part of this re-inspection. All building materials located in the facilities listed within this report that are original building materials should be considered asbestos containing until proven otherwise through asbestos management plan records or current asbestos bulk sampling. Any planned renovation, modernization or demolition of any structures located within this school district should not commence until an extensive asbestos bulk sampling inspection is conducted of the building materials present at the school site whether listed within this plan or not. Asbestos bulk sampling and inspection services must be completed by State of California Certified personnel (Site Surveillance Technician or Certified Asbestos Consultant). All laboratory analysis and reporting must be completed by a licensed and certified laboratory facility.

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Part 2	Signature / Certification Page
Part 3	WEST Credentials
Part 4	2018 AHERA Management Plan Recommendations
Part 5	2018 AHERA Re-inspection Report / Assessments

Attachment 1

How to Manage Asbestos in School Buildings The AHERA Designated Person's Informational Guide

Part 1	AHERA Three Year Re-Inspection Plan
Part 2	Signature / Certification Page
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Part 5	2018 AHERA Re-inspection Report / Assessments

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AHERA Three Year Re-Inspection Plan

Every three years after implementation of a management plan, an accredited inspector must conduct a reinspection of all friable and non-friable known or assumed ACBM in every school building in order to determine if there has been any change in the condition of the ACBM. An accredited management planner must then review the re-inspection report to identify any new hazard potential and revise the management plan to address newly identified hazards. Based on the updated data, new response actions to address these hazards must be selected, and these actions must be carried out in a timely manner.

The re-inspection process presents an ideal time for an accredited inspector and management planner to address any problems found in the initial inspection report and management plan.

Inspector Responsibilities during the AHERA 3 Year Re-inspection

Under § 763.85(b) of the AHERA Rule, in conducting a re-inspection, the inspector must:

- Visually re-inspect and reassess the condition of all friable known or assumed ACBM.
- Visually inspect material that was previously considered non-friable and touch the material to determine whether it has become friable since the last inspection or re-inspection.
- Identify any homogeneous areas in which material has become friable since the last inspection or reinspection.
- Bulk samples may be collected and submitted for analysis for any homogeneous area of newly friable material that is already assumed to be ACBM.
- Perform a physical assessment, in accordance with § 763.88 of the AHERA Rule, of the condition of the newly friable material in areas where samples are collected and of newly friable materials in areas assumed to be ACBM.
- Reassess the condition of friable known or assumed ACBM previously identified.
- Record and submit the following information for inclusion in the management plan to the LEA designated person within 30 days of the re-inspection:

Required by AHERA

Date of the re-inspection, Name and signature of the person conducting the re-inspection State, accreditation number, and training provider name for any person conducting the re-inspection (copy of certificate is ideal) Exact locations where samples were collected during the re-inspection, Description of the manner used to determine sampling locations, Name and signature of each accredited inspector who collected the samples, State, accreditation number, and training provider name for each inspector who collected the samples (copy of certificate is ideal), Any assessments or reassessments made of friable material, Name and signature of the accredited inspector making the assessments, State accreditation number and training provider name for each inspector making the assessments (copy of certificate is ideal)

Management Planner Responsibilities - AHERA 3 Year Re-inspection

Once a re-inspection is completed, the management planner must:

- Review the results of the re-inspection. This includes reviewing the original inspection report, periodic surveillance records, and the completed re-inspection forms and report. The management planner should conduct school visits and gather other information so that he or she can make effective response action recommendations.
- Make written response action and preventive measure recommendations for each area of friable surfacing and miscellaneous ACBM and each area of TSI ACBM. The management planner should determine whether additional cleaning is necessary and, if so, specify how, when, and where to perform cleaning. The management planner should also include an implementation schedule for the recommended activities and make an estimate regarding the resources (cost, personnel, equipment, etc.) needed to conduct the activities.
- Review the adequacy of the Operations & Maintenance Program.
- The recommendations should include a record of the name, signature, State, accreditation number and training provider name for the management planner (copy of certificate is ideal) and the date on which the management planner submitted the recommendations.

- Part 1 AHERA Three Year Re-Inspection Plan
- Part 2 Signature / Certification Page**
- Part 3 WEST Credentials
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Signature Sheet

This school was re-inspected for all friable and non-friable ACBM as required by the Asbestos Hazard Emergency Response Act (AHERA), 40 CFR 763.88. The re-inspection consisted of visual and tactile examination and assessment of all ACBM in accessible areas of the school facility. Physical assessment data was obtained throughout the facility for all known homogenous areas and functional spaces for all materials deemed to be friable or likely to become friable. All facility re-inspections, taking samples, and physical assessments were conducted by an accredited inspector according to the requirements of AHERA, Section 763.88.

Inspector Certification - Responsibilities during the AHERA 3 Year Re-inspection

Under § 763.85(b) of the AHERA Rule, in conducting a re-inspection, I certify the following:

- Visually re-inspect and reassess the condition of all friable known or assumed ACBM.
- Visually inspect material that was previously considered non-friable and touch the material to determine whether it has become friable since the last inspection or re-inspection.
- Identify any homogeneous areas in which material has become friable since the last inspection or reinspection.
- Perform a physical assessment, in accordance with § 763.88 of the AHERA Rule, of the condition of the newly friable material in areas where samples are collected and of newly friable materials in areas assumed to be ACBM.
- Reassess the condition of friable known or assumed ACBM previously identified.



David Christy / CAC# 92-0703

9/12/18

Date

Management Planner Responsibilities - AHERA 3 Year Re-inspection

Once a re-inspection is completed, the management planner must:

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- The recommendations should include a record of the name, signature, State, accreditation number and training provider name for the management planner (copy of certificate is ideal) and the date on which the management planner submitted the recommendations.



David Christy / CAC# 92-0703

9/12/18

Date

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Outline of Firm

Firm Name: **Western Environmental & Safety Technologies**
Address: **7676 Hazard Center Drive, Suite #500
San Diego, California 92108**

Telephone Number: **1-858-271-1842**
Fax Number : **1-858-271-1856**

E-mail Address: gowestdc@msn.com

Branch Office: **Flagstaff Arizona**

Year Established: **1995 (Celebrating our 23rd year of operation)**

Corporate Status: **General Partnership
Limited Liability Corporation (LLC)**

Discipline: **Environmental Consultation, Laboratory Analysis, Training**

Insurance Carrier: **Leavitt Insurance Services**

Insurance Coverage: **General Liability \$3,000,000
Contractors Pollution Liability \$3,000,000
Professional Liability \$3,000,000 (Errors and Omissions)**

Service Sector: **Public, Private, Government**

Range of Firms Capabilities and Services

Asbestos Consultation (All Completed In-house)

Bulk Sampling / Air Sampling / Initial Surveys / Removal Monitoring / AHERA Consultation
O&M Programs / Removal Specifications / Expert Witness

Lead Paint Consultation (Combination of Sub-contracted work and In-house)

Bulk Sampling (OSHA Related) / Air Sampling (OSHA Related) / XRF Sampling (Sub-contracted)
Onsite Removal Supervision / Consultation / O&M Programs / Removal Specifications

Microbial Consultation (Combination of Sub-contracted work and In-house)

On-site Microbial Investigations / Surface Sampling / Air Sampling / Laboratory Sample Analysis (Sub-contracted)
Onsite Removal Supervision / General Consultation / Removal Recommendations

Training (All Completed In-house)

Asbestos Awareness / Asbestos O&M Training (16 hour) / AHERA Worker Refresher Course
AHERA Supervisor Refresher Course / AHERA Inspector Refresher Course / AHERA Management Planner
Refresher Course / Respirator Fit Testing

Laboratory Testing (Combination of Sub-contracted work and In-house)

Asbestos Bulk Sampling (PLM) / Asbestos Air Sampling (PCM) / Asbestos Air Sampling (TEM)
Lead Paint Sampling / Lead Air Sampling

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Recommendations

Based on the 2018 AHERA re-inspection, the following recommendations are made:

Management Plans -- Each LEA must complete an asbestos management plan for each school under its authority. An accredited management planner must prepare the management plan based on the results of the inspection. In the management plan, the management planner recommends appropriate response actions, prepares cost estimates on the response actions, and schedules the response actions. Your existing management plan must be updated on a timely basis.

1. **Operations and Maintenance** -- The LEA must implement an operations and maintenance (O&M) program whenever any friable ACBM is present or assumed to be present in a building under its authority. Where material identified as non-friable ACBM or non-friable assumed ACBM is about to become friable as a result of activities performed in the building, it must be treated as friable and thus must also be subject to an O&M program. EPA recommends that the LEA also manage non-friable ACBM in their school buildings under an O&M program. **Continue to utilize the existing O & M Plan in your original Management Plan for all known or assumed asbestos materials found within your school district. This will include but is not limited to the materials assessed within this three year re-inspection.**
2. **The assessments made within this 3 year report are based on original AHERA management plan documentation and also field assessments and assumption made by the WEST on-site certified inspector. No bulk sampling was conducted as part of this re-inspection. All building materials located in the facilities listed within this report that are original building materials should be considered asbestos containing until proven otherwise through asbestos management plan records or current asbestos bulk sampling. Any planned renovation, modernization or demolition of any structures located within this school district should not commence until an extensive asbestos bulk sampling inspection is conducted of the building materials present at the school site whether listed within this plan or not. Asbestos bulk sampling and inspection services must be completed by State of California Certified personnel (Site Surveillance Technician or Certified asbestos Consultant). All laboratory analysis and reporting must be completed by a licensed and certified laboratory facility.**
3. Great care should be followed when removing carpets for replacement purposes. Asbestos floor tile may be present that was not known or identified. Asbestos floor tile may also be present under newer floor tile. Asbestos flooring should also be considered under all temporary walls, and all case work (book cases, cabinets, and sinks)
4. Any new construction and newer re-locatable buildings located at the schools may need additional “non-asbestos” paperwork for management plan records.
5. There has been an extensive amount of asbestos pipe insulation removal from several school locations. While most of the boiler and mechanical rooms show no asbestos pipe insulation, all walls and ceiling spaces should be considered to contain asbestos insulated pipes. Care should be used when accessing wall and ceiling spaces as to not inadvertently damage concealed asbestos insulation materials.
6. Around 7/1/2018, conduct AHERA 6-month periodic inspection.
7. Around 2/1/2021, conduct AHERA 3-year re-inspection.
8. **In addition to the common asbestos building materials found within School buildings, there are several additional building materials that are routinely showing up containing asbestos. These areas include exterior window putty, exterior wall plaster, Ceiling tile and wall tile mastics, wall board / ink board mastics, interior drywall mud, and interior wall plaster. All of these materials should also be considered asbestos containing until proven not to be asbestos containing based on historical sampling data or current asbestos sample analysis.**
9. Once ACBM is identified or assumed to be present in a building, the LEA must provide an annual *written* notification to building occupants, employees, and parents on the locations of asbestos-containing building materials in the school buildings, the availability of the asbestos management plan, and recent and upcoming asbestos activities, such as abatement projects, re-inspections, etc.
10. Within 60 days of hire, maintenance and custodial staff who may work in a building that contains ACBM must receive at least two hours of asbestos awareness training. Those members of the maintenance and custodial staff who conduct any

activity that will disturb ACM must receive an additional 14 hours of training. Other state and local training requirements may apply.

11. **Warning Labels** - Under § 763.95 of the AHERA Rule, the LEA must attach a warning label immediately adjacent to any friable and non-friable ACM and suspected ACM that is located in routine maintenance areas (such as boiler rooms) at each school building. Such material includes friable ACM that was responded to by a means other than removal (e.g., encapsulation) and ACM for which no response action was carried out. The labels must be prominently displayed in readily visible locations, must be in print that is readily visible due to its large size or bright color, and must remain posted until the ACM that is labeled is removed.

12. **Recordkeeping of Management Plans**

Under § 763.93(g) of the AHERA Rule, each LEA is required to keep in its administrative office a copy of the management plans for each school. The management plan must be available, without cost or restriction, for inspection by the public, including teachers, other school personnel and their representatives, and parents, as well as by representatives of EPA and the State.

In addition, each school is required to maintain in its administrative office a complete and updated copy of the management plan for that school. The school must make the plan available for inspection to those individuals listed above as well as to workers before work begins in any area of a school building.

It is the responsibility of the LEA designated person to ensure that complete and up-to-date records are maintained and included in the management plan. Section 763.94 of the AHERA Rule requires that the LEA maintain the list of records as outlined.

13. **Restrict Attic / Above Drop Ceiling Tile Access**

Due to the potential of friable asbestos materials, restrict access to only properly trained personnel, equipment with proper personal protective equipment.

14. **Older Modular Buildings – Textured Wall Paint**

WEST has found asbestos in textured wall paint on numerous other projects. Due to the potential of friable asbestos materials, restrict access to these materials found within the school district and treat all textured wall paint on modular buildings as asbestos containing.

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The AHERA Designated Person's Informational Guide**

Dehesa Elementary School Dehesa School District

8/29/18

Asbestos Hazard Emergency Response Act (AHERA)

3-Year Re-inspection - 2018

Asbestos Bulk Sampling and Assessments

The assessments made within this 3-year report are based on original AHERA management plan documentation, field assessments and assumption made by the WEST on-site certified inspector. No bulk sampling was conducted as part of this re-inspection. All building materials located in the facilities listed within this report that are original building materials should be considered asbestos containing until proven otherwise through asbestos management plan records or current asbestos bulk sampling. Any planned renovation, modernization or demolition of any structures located within this school district should not commence until an extensive asbestos bulk sampling inspection is conducted of the building materials present at the school site whether listed within this plan or not. Asbestos bulk sampling and inspection services must be completed by State of California Certified personnel (Site Surveillance Technician or Certified Asbestos Consultant). All laboratory analysis and reporting must be completed by a licensed and certified laboratory facility. Building materials that are known / assumed to be in place at this location and may be exposed or may be covered by non-asbestos newer building products. Please see district construction records for details of non-asbestos construction materials and past asbestos abatement records for material removal. If records cannot be verified, asbestos bulk sampling should be conducted for verification prior to disturbance of any building material.

New Construction / Modernization of Original Buildings and New Modular / Relo. Buildings

If listed as new construction, the school site may be of newer construction materials, new modular building placement, or heavily modernized. Based on the new construction year built or the asbestos abatement activities conducted during a past modernization, asbestos containing building materials (ACBM) may be considered to not be present at various school site locations. Please see district records for "non-asbestos" construction documents or asbestos removal documentation that would support the site to be deemed asbestos free for these types of scenarios.

3-YEAR AHERA REINSPECTION

Inspection Date: 8/29/18

District: Dehesa School District

School: Dehesa Elementary School

Building Name: A, B, C, E, F,

Homogeneous Area Number: New Area

1. Type Matl: Misc Friable: yes no Quantity: _____
Sampled: yes no Number of Samples: _____ Percent: _____

2. Description: Floor tile material.

3. CONDITION RATING: _____

Percent Damage: _____ Distributed: Localized:

Type of Damage: _____ Debris: yes no

Comments: Floor tile and mastic was removed from areas during the past
Modernization. Please see district records for details. All flooring areas show
New floor coverings. Assumed under all existing floors, walls and built-ins.

4. POTENTIAL FOR DISTURBANCE Rating: _____

Potential for Contact: HIGH MEDIUM LOW

Explain: _____

Potential for Vibration: HIGH MEDIUM LOW

Explain: _____

Potential for Air Erosion: HIGH MEDIUM LOW

Explain: _____

Located in air plenum: Yes No

3-YEAR AHERA REINSPECTION

Inspection Date: 8/29/18

District: Dehesa School District

School: Dehesa Elementary School

Building Name: A, B, C, E, F, Maintenance Building

Homogeneous Area Number: New Area

1. Type Matl: Misc Friable: yes no Quantity: _____
Sampled: yes no Number of Samples: _____ Percent: Assumed

2. Description: Roofing Materials

3. CONDITION RATING: Good
Percent Damage: 1% Distributed: Localized:
Type of Damage: _____ Debris: yes no
Comments: _____

4. POTENTIAL FOR DISTURBANCE Rating: Low
Potential for Contact: HIGH MEDIUM LOW
Explain: _____

Potential for Vibration: HIGH MEDIUM LOW
Explain: _____

Potential for Air Erosion: HIGH MEDIUM LOW
Explain: _____

Located in air plenum: Yes No

3-YEAR AHERA REINSPECTION

Inspection Date: 8/29/18

District: Dehesa School District

School: Dehesa Elementary School

Building Name: A, B, C, E, F

Homogeneous Area Number: New Area

1. Type Matl: Misc. Friable: yes no Quantity: _____
Sampled: yes no Number of Samples: _____ Percent: assumed

2. Description: Exterior Window Putty / window sealants and caulking's

3. CONDITION RATING: Good
Percent Damage: 1% Distributed: Localized:
Type of Damage: _____ Debris: yes no

Comments: This material is assumed throughout the campus for all original bldgs. Extensive asbestos bulk sampling (PLM) should be conducted on all building materials that may be disturbed. Sampling should be completed by certified third party personnel utilizing a properly accredited and licensed laboratory.

4. POTENTIAL FOR DISTURBANCE Rating: Low

Potential for Contact: HIGH MEDIUM LOW
Explain: slight wear cracking

Potential for Vibration: HIGH MEDIUM LOW
Explain: _____

Potential for Air Erosion: HIGH MEDIUM LOW
Explain: _____

Located in air plenum: Yes No

3-YEAR AHERA REINSPECTION

Inspection Date: 8/29/18

District: Dehesa School District

School: Dehesa Elementary School

Building Name: A, B, C, E, F

Homogeneous Area Number: New Area

1. Type Matl: Misc. Friable: yes no Quantity: _____
Sampled: yes no Number of Samples: _____ Percent: assumed

2. Description: Exterior Wall Stucco and overhangs

3. CONDITION RATING: Good
Percent Damage: 1% Distributed: Localized:
Type of Damage: _____ Debris: yes no

Comments: This material is assumed throughout the campus for all original bldgs.
Extensive asbestos bulk sampling (PLM) should be conducted on all building
materials that may be disturbed. Sampling should be completed by certified
third party personnel utilizing a properly accredited and licensed laboratory.

4. POTENTIAL FOR DISTURBANCE Rating: Low

Potential for Contact: HIGH MEDIUM LOW

Explain: _____

Potential for Vibration: HIGH MEDIUM LOW

Explain: _____

Potential for Air Erosion: HIGH MEDIUM LOW

Explain: _____

Located in air plenum: Yes No

3-YEAR AHERA REINSPECTION

Inspection Date: 8/29/18

District: Dehesa School District

School: Dehesa Elementary School

Building Name: A, B, C, E, F

Homogeneous Area Number: New Area

1. Type Matl: Misc. Friable: yes no Quantity: _____
Sampled: yes no Number of Samples: _____ Percent: assumed

2. Description: Ceiling tile and wall tile mastics, wall board / ink board mastics
Concealed behind newer finishes

3. CONDITION RATING: Good
Percent Damage: 1% Distributed: Localized:
Type of Damage: _____ Debris: yes no

Comments: This material is assumed throughout the campus for all original bldgs.
Extensive asbestos bulk sampling (PLM) should be conducted on all building
materials that may be disturbed. Sampling should be completed by certified
third party personnel utilizing a properly accredited and licensed laboratory.

4. POTENTIAL FOR DISTURBANCE Rating: Low

Potential for Contact: HIGH MEDIUM LOW
Explain: _____

Potential for Vibration: HIGH MEDIUM LOW
Explain: _____

Potential for Air Erosion: HIGH MEDIUM LOW
Explain: _____

Located in air plenum: Yes No

3-YEAR AHERA REINSPECTION

Inspection Date: 8/29/18

District: Dehesa School District

School: Dehesa Elementary School

Building Name: A, B, C, E, F

Homogeneous Area Number: New Area

1. Type Matl: Misc. Friable: yes no Quantity: _____
Sampled: yes no Number of Samples: _____ Percent: assumed

2. Description: Interior Wall Plasters

3. CONDITION RATING: Good
Percent Damage: 1% Distributed: Localized:
Type of Damage: _____ Debris: yes no

Comments: This material is assumed throughout the campus for all original bldgs. Extensive asbestos bulk sampling (PLM) should be conducted on all building materials that may be disturbed. Sampling should be completed by certified third party personnel utilizing a properly accredited and licensed laboratory.

4. POTENTIAL FOR DISTURBANCE Rating: Low
Potential for Contact: HIGH MEDIUM LOW
Explain: _____

Potential for Vibration: HIGH MEDIUM LOW
Explain: _____

Potential for Air Erosion: HIGH MEDIUM LOW
Explain: _____

Located in air plenum: Yes No

3-YEAR AHERA REINSPECTION

Inspection Date: 8/29/18

District: Dehesa School District

School: Dehesa Elementary School

Building Name: A, B, C, E, F

Homogeneous Area Number: New Area

1. Type Matl: Misc. Friable: yes no Quantity: _____
Sampled: yes no Number of Samples: _____ Percent: assumed

2. Description: Drywall mud and textures

3. CONDITION RATING: Good
Percent Damage: 1% Distributed: Localized:
Type of Damage: _____ Debris: yes no

Comments: This material is assumed throughout the campus for all original bldgs. Extensive asbestos bulk sampling (PLM) should be conducted on all building materials that may be disturbed. Sampling should be completed by certified third party personnel utilizing a properly accredited and licensed laboratory.

4. POTENTIAL FOR DISTURBANCE Rating: Low

Potential for Contact: HIGH MEDIUM LOW

Explain: _____

Potential for Vibration: HIGH MEDIUM LOW

Explain: _____

Potential for Air Erosion: HIGH MEDIUM LOW

Explain: _____

Located in air plenum: Yes No

3-YEAR AHERA REINSPECTION

Inspection Date: 8/29/18

District: Dehesa School District

School: Dehesa Elementary School

Building Name: A, B, C, E, F

Homogeneous Area Number: New Area

1. Type Matl: Misc. Friable: yes no Quantity: _____
Sampled: yes no Number of Samples: _____ Percent: assumed

2. Description: Fire door insulation

3. CONDITION RATING: Good
Percent Damage: 1% Distributed: Localized:
Type of Damage: _____ Debris: yes no

Comments: This material is assumed throughout the campus for all original bldgs. Extensive asbestos bulk sampling (PLM) should be conducted on all building materials that may be disturbed. Sampling should be completed by certified third party personnel utilizing a properly accredited and licensed laboratory.

4. POTENTIAL FOR DISTURBANCE Rating: Low

Potential for Contact: HIGH MEDIUM LOW

Explain: _____

Potential for Vibration: HIGH MEDIUM LOW

Explain: _____

Potential for Air Erosion: HIGH MEDIUM LOW

Explain: _____

Located in air plenum: Yes No

3-YEAR AHERA REINSPECTION

Inspection Date: 8/29/18

District: Dehesa School District

School: Dehesa Elementary School

Building Name: A, B, C, F

Homogeneous Area Number: New Area

1. Type Matl: TSI Friable: yes no Quantity: _____
Sampled: yes no Number of Samples: _____ Percent: assumed

2. Description: Concealed Pipe and Duct Insulations

3. CONDITION RATING: _____

Percent Damage: _____ Distributed: Localized:

Type of Damage: _____ Debris: yes no

Comments: Asbestos pipe and duct insulations should be considered within all wall and ceiling spaces of this school site. The assessment of those materials is

not conducted since these materials were not accessed.

Extensive asbestos bulk sampling (PLM) should be conducted on all building

materials that may be disturbed. Sampling should be completed by certified third party personnel utilizing a properly accredited and licensed laboratory.

4. POTENTIAL FOR DISTURBANCE Rating: _____

Potential for Contact: HIGH MEDIUM LOW

Explain: _____

Potential for Vibration: HIGH MEDIUM LOW

Explain: _____

Potential for Air Erosion: HIGH MEDIUM LOW

Explain: _____

Located in air plenum: Yes No

Attachment 1

How to Manage Asbestos in School Buildings The AHERA Designated Person's Informational Guide



How to Manage Asbestos in School Buildings

The AHERA Designated Person's Informational Guide

Background

On October 22, 1986, Congress promulgated the Asbestos Hazard Emergency Response Act (AHERA), Public Law 99-519. AHERA mandated that EPA develop regulations to respond to asbestos in schools. On October 30, 1987, EPA promulgated the Asbestos-Containing Materials in Schools Rule (hereinafter referred to as the AHERA Rule), 40 CFR Part 763, Subpart E. This rule requires that all of the nation's nonprofit elementary and secondary schools, both public and private, inspect their school buildings for asbestos-containing building materials (ACBM), develop a plan to manage the asbestos for each school building, notify parents and staff regarding management plan availability, provide asbestos awareness training to school maintenance and custodial workers, and other requirements described in detail in this manual.

The governing authority responsible for AHERA compliance is the Local Education Agency (LEA). "Local Education Agency" means either any local educational agency as defined in Section 198 of the Elementary and Secondary Education Act of 1965 (often called school district), the owner of any private, non-profit elementary or secondary school building, or the governing authority of any school operated under the Defense Department's education system.

Scope and Purpose of AHERA

Broadly stated, AHERA requires that each Local Education Agency (LEA) perform inspections to identify asbestos-containing materials in each of the public and private elementary and secondary schools under its authority; develop, implement and update asbestos management plans; take appropriate response actions; safely maintain asbestos-containing building materials (ACBM); and comply with AHERA's recordkeeping requirements. The AHERA Rule outlines the general responsibilities of a LEA in § 763.84 and the specific duties of the LEA in the succeeding sections of the rule.

Responsibilities of the AHERA Designated Person

The responsibilities of the AHERA Designated Person include:

- ensure that all activities of anyone who conducts the following are carried out in accordance with the AHERA requirements: conduct inspections, re-inspections, periodic surveillance; develops, implements and updates management plans; and plans and implements asbestos-related activities (such as maintenance or removal);
- ensure that all custodial and maintenance employees are properly trained;
- ensure that all workers, building occupants, students, and their parents are notified annually about management plan availability and recent and upcoming asbestos-related activities;
- ensure that short-term workers who may come into contact with asbestos are provided information regarding the location of this asbestos;
- ensure that all warning labels are posted;
- consider any conflicts of interest that may arise when selecting accredited personnel to conduct asbestos-related activities.

AHERA Designated Person Required Training

AHERA requires that the DP be *adequately* trained to carry out his or her responsibilities. Due to the differing needs of school districts based on the size of the district and the amount and condition of the ACBM, AHERA does not list a specific training course or specific number of hours of training for the DP. Further, AHERA does not require the DP to be accredited. Specifically, the regulations note the training must include the following topics:

- health effects of asbestos;
- detection, identification and assessment of asbestos-containing building materials (ACBM);
- options for controlling asbestos-containing building materials;
- asbestos management programs.
- relevant Federal and State regulations concerning asbestos, including AHERA and its implementing regulations and the regulations of the Occupational Safety and Health Administration, the U.S. Department of Transportation, and the U.S. Environmental Protection Agency.

Specific Responsibilities of the LEA relating to the AHERA Program

Sections 763.85-763.99 of the AHERA Rule detail the specific responsibilities of the LEA. These responsibilities are listed below, followed by brief descriptions.

- **Inspections:** An accredited inspector must conduct inspections of each school building under the authority of the LEA. This involves visually inspecting buildings for friable and nonfriable ACBM, sampling such materials unless they are assumed to be ACBM, and having samples analyzed in accordance with the AHERA regulations. Only accredited laboratories may be used to perform bulk material sampling analyses.
- **Re-inspections:** An accredited inspector must conduct a reinspection of all friable and nonfriable known or assumed ACBM in each school building at least once every three years that a management plan is in effect. A management planner must review all three year inspection reports.
- **Assessment:** For each inspection and reinspection, an accredited inspector must provide a written assessment of all friable known or assumed ACBM in the school building.
- **Management Plans:** Each LEA must complete an asbestos management plan for each school under its authority. An accredited management planner must prepare the management plan based on the results of the inspection. In the management plan, the management planner recommends appropriate response actions, prepares cost estimates on the response actions, and schedules the response actions. The management plan must be updated on a timely basis.
- **Response Actions:** Based on the recommendations of the management planner, the LEA must select the appropriate response actions consistent with the assessment of the ACBM. The designated person must see to it that the response actions are carried out in a timely manner and in compliance with the AHERA requirements. "Timely manner" is not defined in the regulations but involves the joint development of a schedule for plan implementation by the management planner and the designated person. Only accredited laboratories may be used to perform final clearance air sample analyses.
- **Operations and Maintenance:** The LEA must implement an operations and maintenance (O&M) program whenever any friable ACBM is present or assumed to be present in a building under its authority. Where material identified as non-friable ACBM or non-friable assumed ACBM is about to become friable as a result of activities performed in the building, it must be treated as friable and thus must also be subject to an O&M program. EPA recommends that the LEA also manage non-friable ACBM in their school buildings under an O&M program.

- **Training:** AHERA requires that building inspectors, management planners, project designers, contractors/supervisors, and asbestos workers be accredited before they can perform asbestos-related activities. The AHERA regulations details specific training requirements for the designated person and for custodial and maintenance workers, although these individuals are not required to complete any EPA-approved courses or receive accreditation.

- **Notification:** The LEA must issue the following notifications regarding asbestos identified in its schools:
An annual notice to all workers and building occupants, or their legal guardians, of all inspections, re-inspections, and activities being conducted to control asbestos exposure, including periodic surveillance and asbestos removal, that are planned or in progress. This notification should be documented in the management plan.

An annual written notice informing parent, teacher, and employee organizations of the availability of the management plan for their review. A dated copy of this notice must be maintained as part of the management plan. A notice to short-term workers (e.g., telephone repair workers, utility workers, or exterminators) who may come into contact with asbestos in a school identifying the location of ACBM or assumed ACBM in the building.

This notification should be documented in the management plan.

A description of all notification processes must be maintained as part of the management plan. The Parent Teacher Association (PTA) or school newsletter may be used as a means to distribute the notifications to the students and their families.

- **Periodic Surveillance:** The LEA must conduct periodic surveillance in each building under its authority at least once every six months after a management plan is in effect. The periodic surveillance inspection report must be kept in the management plan.

- **Recordkeeping:** Records involving the inspection of and response to ACBM must be kept in a centralized location in the administrative office of both the school and the LEA.

EPA recommends keeping these records in the management plan for each school building and the overall management plan for all school buildings. Recordkeeping is the responsibility of the designated person. The following records must be kept:

Descriptions of preventive measures and response actions taken for friable and non-friable ACBM and suspected ACBM, Sampling information, Training information, Periodic surveillance information, Information on initial and additional cleaning performed, Information on operations and maintenance activities, including information on any maintenance activities disturbing friable ACBM, Notifications to parents, building occupants, and short-term workers, Information on any fiber-release episodes.

- **Warning Labels:** The LEA must attach a warning label immediately adjacent to any friable and nonfriable ACBM and suspected ACBM assumed to be ACBM located in routine maintenance areas (such as boiler rooms) at each school building.

General LEA Responsibilities relating to the AHERA Program

Under § 763.84 of the AHERA Rule, the LEA has the following general responsibilities:

- Ensure that the activities of any persons who perform inspections, re-inspections, and periodic surveillance, develop and update management plans, develop and implement response actions, and conduct operations and maintenance activities are in compliance with all of the AHERA requirements.
- Ensure that all custodial and maintenance workers are properly trained.
- Ensure that workers and building occupants or their legal guardians are notified at least annually about activities relating to ACBM.
- Ensure that short-term workers who may come in contact with asbestos in a school are provided the locations of ACBM and suspected ACBM assumed to be ACBM.
- Ensure that warning labels are properly posted.
- Ensure that management plans are available for inspection.
- Appoint a "designated person" to ensure proper implementation of the AHERA requirements.
- Ensure that the designated person receives adequate training to perform duties assigned.
- Consider whether any conflict of interest may arise among personnel undertaking activities related to the ACBM in a school or schools.

EPA Policy for Asbestos Control in Schools

EPA bases its policy for asbestos control in schools on the following premises:

- Although asbestos is hazardous, the risk of asbestos-related disease depends upon exposure to airborne asbestos fibers.
- Based upon available data, the average airborne asbestos levels in buildings seem to be very low. Accordingly, the health risk to most building occupants also appears to be very low.
- Removal is often not a building owner's best course of action to reduce asbestos exposure. In fact, an improper removal can create a dangerous situation where none previously existed.
- EPA only requires asbestos removal to prevent significant public exposure to airborne asbestos fibers during building demolition or renovation activities.
- Asbestos that has been identified will pose little risk if it is well maintained under an operations and maintenance program. Improper operations and maintenance also can cause dangerous situations. Therefore, EPA requires a proactive, in-place management program whenever ACBM is discovered and is not removed.

Conflicts of Interest relating to the AHERA Program

The AHERA Designated Person (school asbestos coordinator) should take into consideration any conflict of interest and determine whether it should influence their selection of contractors to accomplish asbestos related work in their schools. The AHERA Rule identifies several situations where a conflict of interest may arise. For example, the abatement contractor is not allowed to conduct final air sampling for clearance by TEM analysis (*See 40 CFR Part 763, Appendix A to Subpart E ((II)(B)(2))*). The group that determines whether an abatement site is acceptable for re-occupancy should not be the same (or a related group) that is conducting the abatement work. Similarly, if the LEA requires a management planner to sign a statement certifying that the management plan is in compliance with AHERA, then the LEA may not want the planner signing the statement to be the one who implements or will implement the plan. The LEA may have unique concerns regarding potential conflicts that should be discussed with and addressed by the designated person.

Asbestos / General Information

The History of Asbestos

The word "asbestos" is derived from the Greek language. The Greeks admired the "miracle mineral" because of its softness and flexibility and its ability to withstand heat. The Greeks used asbestos much like cotton, spinning and weaving it into cloth. Asbestos was not widely available anywhere in the world until the late 1800s, when major deposits were found in Canada. Thereafter, asbestos was used to make thermal insulation for boilers, pipes, and other high temperature applications, and was also used as a fireproofing and reinforcement material. During World Wars I and II, the military used asbestos extensively in ships and other applications. Commercial usages of asbestos in buildings increased greatly thereafter, but growing concerns about the health risks associated with asbestos exposure resulted in a voluntary reduction in the use of asbestos beginning in the 1970s.

Characteristics of Asbestos

Asbestos is comprised of a group of natural minerals. Unlike other minerals, however, the crystals of asbestos form long, thin fibers. Asbestos deposits are found throughout the world, but the primary sites of commercial asbestos production are Canada, Russia, and South Africa. Commercial mining of asbestos in the United States was halted in the 1980s.

Once extracted from the earth, asbestos-containing rock is crushed, milled (or ground), and graded. This produces long, thread-like fibers of material. What appears to the naked eye as a single fiber is actually a bundle of hundreds or thousands of fibers, each of which can be divided even further into tiny fibers (fibrils), invisible without the aid of a microscope.

Asbestos materials are divided into two groups --*serpentine* and *amphibole*. All asbestos in the serpentine group is called Chrysotile. This is the most common type of asbestos found in buildings in the United States, accounting for approximately 95 percent of the asbestos found in the nation's buildings. It is commonly known as "white asbestos" because of its natural color.

The amphibole group contains five types of asbestos. Amosite, the second most common type of asbestos found in buildings in the United States, is often referred to as "brown asbestos" for the color of the natural mineral. Crocidolite, or "blue asbestos" has been used in high-temperature insulation products and on chemical resistant surfaces, such as laboratory tables for chemistry and biology classes (upon occasion, the custodial staff will drill holes in table tops for new fixtures without realizing that the material may contain crocidolite. The remaining three types of asbestos in the amphibole group --Anthophyllite, Tremolite, and Actinolite -- are rare and have little commercial value. They are occasionally found as contaminants or minor constituents in asbestos-containing materials.

Uses of Asbestos

Asbestos has been used in thousands of products, largely because it is plentiful, readily available, cheap, strong, does not burn, conducts heat and electricity poorly, and is resistant to chemical corrosion. Products made with asbestos are often referred to as asbestos-containing materials (ACM).

Asbestos proved particularly useful in the construction industry. Building materials that contain asbestos are referred to as asbestos-containing building materials (ACBM). Commercial usage of asbestos products in the construction industry was most common from about 1945 to 1980. Some of the most common uses of ACBM include:

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- **Fireproofing material** -- Usually spray-applied to steel beams used in construction of multi-story buildings to prevent structural members from warping or collapsing in the event of fire.
- **Insulation material** -- Usually spray-applied, trowel-applied, or manually installed after being preformed to fit surfaces such as pipes for thermal insulation and condensation control.
- **Acoustical or soundproofing material** -- Trowel- or spray-applied. May also be used for decoration. Asbestos was mixed with other materials and sprayed onto ceilings and walls to produce a soft, textured look.
- **Miscellaneous materials** -- Asbestos has been added to asphalt, vinyl, cement and other materials to make products like roofing felts, exterior siding and roofing shingles, wallboard, pipes for water supply, combustion vents, and flues for waste gases and heat.

Fibers in asbestos cement, asphalt, and vinyl materials are usually firmly bound into materials in good condition and typically will be released only if the material is damaged mechanically -- for example through drilling, cutting, grinding, or sanding. In addition, asbestos in roofing shingles and siding exposed to weathering may slowly deteriorate and has the potential to release fibers.

Examples of the more common ACBM found in schools are flooring, vinyl base, mastic, roofing materials, gaskets in heating and air-conditioning equipment, ceiling panels and tiles, wallboard, joint compound, plaster, pipe and boiler insulation, duct-wrap insulation, duct joint tape, duct vibration dampening cloth, fireproofing on structural members, fire brick for boilers, fire doors, acoustical spray-on, cement pipes, and panels.

Friable vs. Non-friable ACBM

Friable ACBM will release fibers into the air more readily than non-friable ACBM. Therefore, the AHERA Rule differentiates between friable and non-friable ACBM. The regulations define friable ACBM as material that may be crumbled, pulverized, or reduced to powder by hand pressure when dry. Friable ACBM also includes previously non-friable material when it becomes damaged to the extent that when dry it may be crumbled, pulverized, or reduced to powder by hand pressure. *Undamaged non-friable ACBM should be treated as friable if any action performed on the material will make them friable.*

Categories of Asbestos-Containing Building Materials

EPA identifies three categories of ACBM (*See the definitions appearing in § 763.83 of the AHERA Rule*):

- **Surfacing Materials** -- Interior ACBM that has been sprayed on, troweled on, or otherwise applied to surfaces (structural members, walls, ceilings, etc.) for acoustical, decorative, fireproofing, or other purposes. This includes acoustical plaster, hard plasters (wall or ceiling), fireproofing insulation, spray-applied or blown-in thermal material, joint or patching compound (wall or ceiling), and textured paints or plasters.
- **Thermal System Insulation** -- Insulation used to control heat transfer or prevent condensation on pipes and pipe fittings, boilers, breeching, tanks, ducts, and other parts of hot and cold water systems; heating, ventilation, and air conditioning (HVAC) systems; or other mechanical systems. These insulation materials include pipe lagging, pipe wrap, HVAC duct insulation, block insulation, cements and mud's, and a variety of other products such as gaskets and ropes.
- **Miscellaneous Materials** -- Other, mostly non-friable products and materials found on structural components, structural members or fixtures, such as floor tile, ceiling tile, construction mastic for floor and ceiling materials, sheet flooring, fire doors, asbestos cement pipe and board, wallboard, acoustical wall tile, and vibration damping cloth. "Miscellaneous materials" do not include thermal system insulation or surfacing materials.

AHERA

Program Details / General Information

Response Actions under the AHERA Program

In the management plan, the accredited management planner must recommend an appropriate response action (operations and maintenance, repair, encapsulation, enclosure, or removal) for all areas of thermal system insulation (TSI) and friable ACBM. The final decision on which action should be taken, however, rests with the LEA. Under AHERA, the response action to be taken must be "sufficient to protect human health and the environment." Once it is determined which response actions meet these criteria, the LEA may choose the action that is the "least burdensome."

AHERA identifies five possible response actions for managing asbestos in schools:

- **Operations and Maintenance (O&M) Program:** This is a program of work practices designed to maintain friable ACBM in good condition and ensure cleanup of asbestos fibers previously released. An effective O & M program can prevent further release by minimizing and controlling friable ACBM disturbance or damage.
- **Repair:** This involves returning damaged ACBM to an undamaged condition or to an intact state by replacing limited sections or patching damaged areas.
- **Encapsulation:** This involves the treatment of ACBM with a material that surrounds or embeds asbestos fibers in an adhesive matrix to prevent the release of fibers. The encapsulant either creates a membrane over the surface (bridging encapsulant) or penetrates the material and binds its components together (penetrating encapsulant). Both types of encapsulants are applied to the material surface using airless spray equipment at low pressure to reduce release of fibers during the application.
- **Enclosure:** This involves creating an airtight, impermeable, permanent barrier around ACBM to prevent the release of asbestos fibers into the air. The barrier is typically attached physically or sprayed on. For example, materials such as PVC or corrugated metal may be fastened around insulated piping, or a barrier may be constructed around asbestos fireproofing on structural members by spraying material that cures into a hard shell.
- **Removal:** This involves the taking out or the stripping of substantially all ACBM from a damaged area, a functional space, or a homogeneous area in a school building.

Project Design for Asbestos Response Actions

All persons who design response actions for schools or public and commercial buildings (including removal, encapsulation, enclosure, or repair -- other than small scale, short duration repairs) must be accredited as a project designer. A response action is defined by AHERA as a method that protects human health and the environment from friable ACBM.

Activities which create a high probability that ACBM will be damaged or weakened to such an extent that it would be rendered friable are also considered response actions.

Although a written design is not mandated, EPA cannot recommend them strongly enough.

To undertake a response action without the benefit of a written design plan to guide the work in progress is not only highly imprudent, but may unnecessarily expose the public to an asbestos fiber release and/or the building owner to certain liabilities. A written project design must be prepared by an accredited project designer. An accredited project designer is one who has received accreditation under AHERA by completing a prescribed training course for project designers and passing an exam.

AHERA Three (3) Year Re-inspection Introduction

Every three years after implementation of a management plan, an accredited inspector must conduct a reinspection of all friable and non-friable known or assumed ACBM in every school building in order to determine if there has been any change in the condition of the ACBM. An accredited management planner must then review the re-inspection report to identify any new hazard potential and revise the management plan to address newly identified hazards. Based on the updated data, new response actions to address these hazards must be selected, and these actions must be carried out in a timely manner.

The re-inspection process presents an ideal time for an accredited inspector and management planner to address any problems found in the initial inspection report and management plan.

Inspector Responsibilities during the AHERA 3 Year Re-inspection

Under § 763.85(b) of the AHERA Rule, in conducting a re-inspection, the inspector must:

- Visually re-inspect and reassess the condition of all friable known or assumed ACBM.
- Visually inspect material that was previously considered non-friable and touch the material to determine whether it has become friable since the last inspection or re-inspection.
- Identify any homogeneous areas in which material has become friable since the last inspection or reinspection.
- Bulk samples may be collected and submitted for analysis for any homogeneous area of newly friable material that is already assumed to be ACBM.
- Perform a physical assessment, in accordance with § 763.88 of the AHERA Rule, of the condition of the newly friable material in areas where samples are collected and of newly friable materials in areas assumed to be ACBM.
- Reassess the condition of friable known or assumed ACBM previously identified.
- Record and submit the following information for inclusion in the management plan to the LEA designated person within 30 days of the re-inspection:

Date of the re-inspection, Name and signature of the person conducting the re-inspection State, accreditation number, and training provider name for any person conducting the re-inspection (copy of certificate is ideal) Exact locations where samples were collected during the re-inspection, Description of the manner used to determine sampling locations, Name and signature of each accredited inspector who collected the samples, State, accreditation number, and training provider name for each inspector who collected the samples (copy of certificate is ideal), Any assessments or reassessments made of friable material, Name and signature of the accredited inspector making the assessments, State accreditation number and training provider name for each inspector making the assessments (copy of certificate is ideal)

Management Planner Responsibilities - AHERA 3 Year Re-inspection

Once a re-inspection is completed, the management planner must:

- Review the results of the re-inspection. This includes reviewing the original inspection report, periodic surveillance records, and the completed re-inspection forms and report. The management planner should conduct school visits and gather other information so that he or she can make effective response action recommendations.
- Make written response action and preventive measure recommendations for each area of friable surfacing and miscellaneous ACBM and each area of TSI ACBM. The management planner should determine whether additional cleaning is necessary and, if so, specify how, when, and where to perform cleaning. The management planner

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should also include an implementation schedule for the recommended activities and make an estimate regarding the resources (cost, personnel, equipment, etc.) needed to conduct the activities.

- Review the adequacy of the Operations & Maintenance Program.
- The recommendations should include a record of the name, signature, State, accreditation number and training provider name for the management planner (copy of certificate is ideal) and the date on which the management planner submitted the recommendations.

AHERA - 6 Month Periodic Surveillance

At least once every six months after a management plan is in effect, the LEA must conduct periodic surveillance in each building that contains ACBM or is assumed to contain ACBM. The surveillance does not have to be conducted by an accredited person, but it should be conducted either by the LEA designated person (if he or she is trained) or by someone who is appropriately trained on asbestos (such as a maintenance person).

Periodic surveillance involves a visual inspection of all areas that are identified in the management plan as ACBM or assumed ACBM. In evaluating each homogeneous area, the person conducting the surveillance must visually inspect all areas identified in the management plan as ACBM or suspected ACBM and record whether there are any changes in the condition of the material (including if there are no changes). The date of the surveillance, the name of the person conducting the surveillance, and any change in condition of the ACBM or assumed ACBM must be documented and included in the management plan within a reasonable amount of time, such as 30 days from the periodic surveillance.

Objectives of the O&M Program outlined in the AHERA Program

An O&M program consists of a set of procedures and practices for operating and maintaining a building to keep it as free of asbestos contamination as possible. The program should be designed specifically to address the ACBM present in the building involved.

An O&M program has three main objectives:

- Clean up existing contamination.
- Minimize future fiber release by controlling access to ACBM and instituting proper work practices.
- Properly maintain the ACBM until it is removed.

Since National Emission Standards for Hazardous Air Pollutants (NESHAP) regulations require that friable and non-friable ACBM which is likely to become friable be removed from buildings before demolition, the O&M program is not a permanent solution. In addition, the asbestos NESHAP may regulate the removal of asbestos as part of a renovation. It is also not a means by which full-scale asbestos abatement can be accomplished. The intentional disturbance of ACBM should be limited to the repair or removal of small areas of significantly damaged ACBM or to small areas where removal is necessary to make maintenance or minor renovation activities easier. Some small scale, short duration activities may be subject to asbestos NESHAP requirements if enough ACBM will be disturbed during a calendar year. Larger abatement projects that require extensive planning and technical expertise may not be part of the AHERA O&M program. Limited encapsulation and enclosure could be used to enhance an O&M program by reducing the likelihood of contact with the ACBM, however.

Required Elements of An O&M Program

Under § 763.91 of the AHERA Rule, the LEA must ensure that the O&M program involve the following elements:

- Cleaning
- Specialized work practices and procedures for O&M activities disturbing friable ACBM
- Training
- Emergency Response Procedures

Cleaning Requirements under AHERA

All areas of a building where friable ACBM and suspected ACBM, or significantly damaged TSI ACBM is present must be cleaned at least once after the completion of the AHERA inspection. It must also be cleaned before the initiation of any response action (other than O&M activities or repair). The exception would be where the building had been cleaned using similar methods within the previous six months. The cleaning must include the following:

- HEPA-vacuuuming or steam-cleaning all carpets
- HEPA-vacuuuming or wet-cleaning all other floors and all other horizontal surfaces
- Disposing of all debris, filters, mopheads, and cloths in sealed, leak-tight containers

The management planner may also recommend that additional cleaning be performed. The methods and frequency of any additional recommended cleaning should be included in the management plan.

Specialized Work Practices and Procedures

The LEA must ensure that the following procedures are followed for any O&M activities disturbing friable ACBM:

- Restrict entry into the area by persons other than those necessary to perform the maintenance project.
- Post signs to prevent entry by unauthorized persons.
- Shut off or temporarily modify the air-handling system and restrict other sources of air movement.
- Use work practices or other controls, such as wet methods, protective clothing, HEPA vacuums, mini-enclosures, and glove bags, as necessary to inhibit the spread of any released fibers.
- Clean all fixtures or other components in the immediate work area.
- Place the asbestos debris and other cleaning materials in a sealed, leak-tight container.

Training Requirements under the AHERA Program

Within 60 days of hire, maintenance and custodial staff who may work in a building that contains ACBM must receive at least two hours of asbestos awareness training. Those members of the maintenance and custodial staff who conduct any activity that will disturb ACBM must receive an additional 14 hours of training. Other state and local training requirements may apply.

Emergency Response Procedures under the AHERA Program

As long as ACBM remains in a building, there is a risk of a fiber release episode. Custodial and maintenance workers should be aware of this and should always report any of the following occurrences to the LEA designated person:

- Any debris found on the floor or other horizontal surface
- Any water or physical damage to the ACBM
- Any other evidence of possible fiber release

There are two types of fiber release episodes: minor episodes and major episodes. The specific procedures that must be followed depend on which type of episode occurs.

Minor Fiber Release Episode

A minor fiber release episode consists of the falling or dislodging of three square or linear feet or less of friable ACBM. Section 763.91(f)(1) of the AHERA Rule requires that when such an event occurs, the LEA must ensure that:

- The debris is thoroughly saturated using wet methods
- The area is cleaned
- The asbestos debris is placed in a sealed, leak-tight container
- The area of damaged ACBM is repaired with such materials as asbestos-free spackling, plaster, cement, or insulation; sealed with latex paint or an encapsulant; or an appropriate response action is implemented as required by § 763.90 of the AHERA Rule

When a minor fiber release episode occurs, AHERA allows the designated person to assign an appropriately trained O&M in-house team to clean up the debris and make repairs as soon as possible. Note, however, that local regulations may be more stringent than the AHERA requirements.

Major Fiber Release Episode

A major fiber release episode consists of the falling or dislodging of more than three square or linear feet of friable ACBM. Section 763.91(f)(2) of the AHERA Rule requires that when such an episode occurs, LEA must ensure:

- Entry into the area is restricted and signs posted to prevent entry into the area by persons other than those necessary to perform the response action.
- The air-handling system is shut off or temporarily modified to prevent the distribution of fibers to other areas in the building.
- The response action for any major fiber release episode is designed by persons accredited to design response actions and conducted by persons accredited to conduct response actions.

After a response action is implemented to manage a major fiber release episode, the final air clearance requirements of AHERA must be met before the response action is considered complete.

Major and minor fiber-release episodes must be documented and included in the management plan regardless of whether the LEA uses in-house staff or an outside asbestos abatement contractor to implement an appropriate response action. If an outside contractor is used, be sure that the contractor's crew has been properly trained or certified before signing a contract.

Other Elements of an O&M Program

In addition to the elements required by § 763.91 of the AHERA Rule, other elements are either recommended or required by the rule or related regulations. These include:

- Notification
- Labeling
- Employee Protection and Medical Surveillance
- Maintenance and Renovation Permit System
- Special Work Practices for Maintenance Activities
- Special Work Practices for Renovation/Remodeling

Notification Requirements under the AHERA Program

Once ACBM is identified or assumed to be present in a building, the LEA must provide an annual *written* notification to building occupants, employees, and parents on the locations of asbestos-containing building materials in the school buildings, the availability of the asbestos management plan, and recent and upcoming asbestos activities, such as abatement projects, re-inspections, etc. Other types of information to include in the notification are: what asbestos is and how it is typically used; the health effects associated with asbestos exposure; the type(s) of ACBM present in the building; the location(s) of these materials; how individuals can avoid disturbing the ACBM; how damage is recognized and to whom it should be reported; how custodial and maintenance personnel are dealing with these materials to prevent fiber release; the asbestos-related training for custodial and maintenance personnel; the steps that will be taken to protect the health and safety of building occupants; and the name and telephone number of the LEA designated person responsible for asbestos-related activities in the building.

Such a notification alerts affected parties to a potential hazard in the building. Building occupants, employees, and others who are aware of the presence of ACBM are less likely to disturb the material and cause fiber release. Notification of building occupants, employees, parents and others is best accomplished through distributing written notices, which may be tailored to specific parties. A common practice is to publish the notification in the school's newsletter, which is distributed to school employees and parents. The designated person must document the notification process and maintain records of all notifications made.

Labeling Requirements under the AHERA Program

Under § 763.95 of the AHERA Rule, the LEA must attach a warning label immediately adjacent to any friable and non-friable ACBM and suspected ACBM that is located in routine maintenance areas (such as boiler rooms) at each school building. Such material includes friable ACBM that was responded to by a means other than removal (e.g., encapsulation) and ACBM for which no response action was carried out.

The labels must be prominently displayed in readily visible locations, must be in print that is readily visible due to its large size or bright color, and must remain posted until the ACBM that is labeled is removed. The warning label must read:

**CAUTION: ASBESTOS. HAZARDOUS. DO NOT DISTURB
WITHOUT PROPER TRAINING AND EQUIPMENT.**

Unlike notification, labeling is not intended as a way to disseminate general information. Instead, it is a last line of defense to prevent unprotected individuals from unknowingly disturbing ACBM.

Employee Protection & Medical Surveillance Programs

The OSHA Asbestos Standard for the Construction Industry and the EPA Worker Protection Rule explain when employees are required to wear a negative-pressure respirator and must be involved in a medical surveillance program (see also OSHA Asbestos Standard for General Industry). The purpose of a medical surveillance program is to determine whether or not an employee is healthy enough to wear a respirator and to detect any health changes in an employee's body resulting from working in asbestos-contaminated areas. Changes in health may indicate the onset of an asbestos-related disease.

In addition, any employee who works in an environment where fiber levels are at the permissible exposure limit or higher or who wears a negative-pressure respirator as part of his or her job must participate in a respiratory

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protection program. The only way to determine whether these fiber levels exist is to collect air samples during projects that disturb ACBM. In an O&M program, the use of negative-pressure respirators will make it necessary for most custodial and maintenance workers to participate in both the medical surveillance program and the respiratory protection program. Even if fiber levels are below the permissible exposure limit described above, it is strongly suggested that an LEA establish these programs and require that employees wear respirators any time they are likely to disturb ACBM.

Maintenance & Renovation Permit System – Working Around Asbestos

One of the most difficult tasks that the LEA designated person faces is minimizing accidental disturbances of ACBM during maintenance and renovation operations. One way that a designated person can control such disturbances is by establishing a permit system where all work orders or requests are processed through the designated person.

In a permit system, all requests for maintenance or renovation activities are given to the designated person before a work order to proceed is issued. The designated person then checks the management plan for information about the presence of ACBM where work is to be performed and physically inspects the area in question to make sure that the records reflect actual conditions. If no asbestos is present, the designated person can sign and issue the work order. If ACBM is present, the designated person can sign the work order and then either ensure that trained maintenance or renovation workers are properly equipped to handle the ACBM or dispatch an "emergency response" team to remove the ACBM. In situations where there are large amounts of ACBM, maintenance or renovation work that does not have to be done immediately should be postponed until the ACBM in the area can be removed by an accredited contractor. The permit system should be in place for all facility maintenance work conducted by the LEA staff, outside contractors, and outside short-term workers.

When outside contractors or short-term workers are likely to come into contact with ACBM in a school building, they must be notified of the locations of ACBM or suspected ACBM in the building. This notification should be documented. These workers should have documentation of appropriate training, should they disturb ACBM during their work.

Special Work Practices for Maintenance Activities

In buildings where ACBM is present, routine maintenance activities, such as work on light fixtures, plumbing fixtures and pipes, air registers, HVAC ducts, and other accessible parts of a building's utility systems, can disturb ACBM and raise levels of airborne asbestos. As a result, maintenance workers should be instructed not to perform any maintenance work that could disturb ACBM unless they are appropriately trained and use specific work practices. These work practices should be tailored to reflect the likelihood that an activity will disturb the ACBM and cause fibers to be released. In determining which work practices should be followed, activities should be placed in one of four categories:

- **Contact with ACBM Unlikely** -- In some buildings with ACBM, many routine maintenance activities can be conducted without contacting the ACBM. Changing a light bulb in a fixture that has asbestos-containing acoustical plaster nearby can usually be performed without jarring the fixture, for example. In such situations where contact with ACBM is unlikely, the only precaution other than normal care generally necessary is to ensure that respirators and a HEPA vacuum are available if needed. These do not have to be taken to the site of the project; they should just be available at a known location in the building.

When maintenance is performed in parts of the building that are free of ACBM, no special precautions are usually necessary. An exception would be work in an area containing no ACBM that causes vibrations to be transferred to a location where ACBM is present.

- **Accidental Disturbance of ACBM Possible** -- Where routine maintenance and repair activities are conducted on fixtures or system parts that are located near friable ACBM, maintenance workers may unintentionally disturb the ACBM and release asbestos fibers. Maintenance work on ventilation ducts in an air-handling room where asbestos fireproofing is on the structural beams could accidentally disturb the fireproofing, for example.

- **Disturbance of ACBM Intended or Likely** -- Some maintenance and repair activities will make ACBM disturbance almost unavoidable. Installing new sprinkler or piping systems will make it necessary to hang pipes from structural members or from the ceiling, and if the beams or ceilings are insulated with ACBM, the ACBM will be scraped away to install hangers. Similarly, pulling cables or wires through spaces with ACBM or ACBM debris is likely to dislodge pieces of the ACBM or disturb ACBM debris and dust. Any time ceiling tiles are moved to allow for entry into the space above a suspended ceiling, settled dust on top of the tiles will be recirculated into the air. If the beams or decking above the ceiling are covered with ACBM, the dust is likely to contain asbestos fibers.

A designated person should not allow such intentional disturbances of ACBM to proceed in an uncontrolled manner. The designated person should ensure that the elements required under § 763.91 of the AHERA Rule to be part of an O&M program are implemented effectively and that the regulatory requirements of the EPA Worker Protection Rule and the OSHA Asbestos Standard for the Construction Industry are followed.

- **A Large Amount of ACBM Will be Disturbed** -- If the maintenance work is part of general building renovation, federal regulations may require that ACBM be removed before the project begins. Even if smaller amounts of ACBM are to be disturbed, building owners should consider removing all ACBM from the area of the building where the maintenance work is planned. Typically, an outside abatement contractor would be hired for the removal project before the maintenance work begins. If the LEA decides to use its own staff to remove the ACBM, these workers must be fully trained and accredited in asbestos abatement.

Special Work Practices for Renovation/Remodeling

Building renovation or building system replacement can cause major disturbances of ACBM that are beyond the scope of school O&M programs. Moving walls, adding wings, and replacing heating or air conditioning systems are likely to involve breaking, cutting, or otherwise disturbing ACBM that may be present. It is highly recommended that ACBM that may be disturbed be removed before any of these activities are begun. The LEA may be required to remove the ACBM if the amount of ACBM that is likely to be disturbed exceeds the threshold amounts of 160 square feet or 260 linear feet established by the National Emission Standards for Hazardous Air Pollutants (NESHAP) regulations.

Although remodeling projects change the building structure less dramatically than renovation projects, disturbances of ACBM are still possible. When a remodeling project involves direct contact with ACBM (such as painting or wallpapering over ACBM), the O&M procedures described in § 763.91(d) of the AHERA Rule must be followed. If the work to be done will make the material friable, the work must either be limited to small-scale, short-duration or be treated as a response action.

Handling and Disposing of Asbestos Wastes

The amount and type of asbestos present both determine whether the LEA must notify EPA (or delegated states) and what procedures that the LEA must follow to control asbestos emissions. If the amount exceeds the regulatory threshold, then a written notification must be submitted ten working days prior to any asbestos stripping or removal operation or demolition operation. EPA regulations (along with state and local requirements) provide detailed instructions on the handling, transport, and disposal of asbestos materials. This includes emission control methods (such as wetting and leak proof wrapping), labels on the containers, recordkeeping and a trained representative on-site. Waste must be disposed of at a site meeting federal, state and local requirements. For a site in your area, contact the local public health department.

Specific Training Requirements as outlined within the AHERA Program

AHERA requires that LEAs employ accredited persons to perform most of the activities associated with asbestos management. Building inspectors, management planners, project designers, contractors/supervisors, and asbestos workers must all complete EPA- or State-approved courses that result in accreditation. The specific training requirements for each of these categories of workers are outlined in Appendix C to the AHERA Rule (the AHERA Model Accreditation Plan). The AHERA Rule also details specific training requirements for LEA designated persons and maintenance and custodial workers, although these individuals are not required to complete any EPA-approved courses or receive accreditation.

Designated Person Training

AHERA requires that the AHERA Designated Person be *adequately* trained to carry out his or her responsibilities. Due to the differing needs of school districts based on the size of the district and the amount and condition of the ACBM, AHERA does not list a specific training course or specific number of hours of training for the DP. Further, AHERA does not require the DP to be accredited. Specifically, the regulations note the training must include the following topics:

- health effects of asbestos;
- detection, identification and assessment of asbestos-containing building materials; • options for controlling asbestos-containing building materials; and
- asbestos management programs.
- Relevant Federal and State regulations concerning asbestos, including AHERA and its implementing regulations and the regulations of the Occupational Safety and Health Administration, the U.S. Department of Transportation, and the U.S. Environmental Protection Agency.

The training completed by the designated person must be documented by course name, dates, and hours of training. This documentation must be kept as a permanent part of the management plan.

To determine whether reviewing this document would satisfy the training requirements for the DP, school personnel should consult with the regional asbestos coordinator in the EPA Regional Office serving their state.

Maintenance and Custodial Workers Training Under The AHERA Program

The LEA must ensure that all maintenance and custodial staff who work in a building that contains ACBM receive a minimum of two hours awareness training, whether or not they are required to work with ACBM. New custodial and maintenance employees must be trained within 60 days after the commencement of employment.

The awareness training must include, but is not limited to:

- Information regarding asbestos and its various uses and forms

- Information on the health effects associated with asbestos exposure
- Locations of ACBM identified throughout each school building in which they work
- Information on how to recognize damaged, deteriorated, and delaminated ACBM
- The name and telephone number of the LEA designated person
- Information on the availability and location of the management plan

Staff that disturb ACBM must receive an additional 14 hours of training. Once this additional training is completed, attendees will be adequately trained to conduct small-scale, short-duration activities and/or minor fiber release episode cleanup and repair procedures. The additional training must include, but is not limited to:

- Descriptions of the proper methods for handling ACBM
- Information on the use of respiratory protection as contained in the EPA/NIOSH Guide to Respiratory Protection for the Asbestos Abatement Industry (September 1986) and other personal protection measures
- The provisions of the AHERA Rule relating to O&M activities (§ 763.91) and training and periodic surveillance (§ 763.92) as well as Appendices A-E of the Rule, EPA regulations contained in 40 CFR Part 763, subpart G, and in 40 CFR Part 61, Subpart M, and OSHA regulations
- Hands-on training in the use of respiratory protection, other personal protection measures, and good work practices

Maintenance and custodial worker training does not require EPA approval, although some States may have more stringent training requirements. It is recommended that the LEA check with its State on the training requirements for maintenance and custodial workers.

The completion of all training by maintenance and custodial workers must be documented.

Accredited Personnel

Under AHERA, LEAs may employ the following individuals only if they have completed EPA- or State-approved training courses, passed the exams, and received accreditation.

Building Inspectors -- Building inspectors must complete a minimum of three days (24 hours) of training. Training course information covers technical information needed to identify and describe ACBM and information needed to write an inspection report.

Management Planners -- Management planners must complete a two-day (16 hours) course after they have completed and passed the exam for the building inspector training described above. This course is an extension of the building inspector training and teaches how to develop a schedule (or plan) for implementation of response actions for hazards or potential hazards identified in the inspection report, how to develop an O&M plan, and how to prepare and update a management plan.

Project Designers -- Project designers must complete a three-day (24 hours) abatement project designer training course. The project designer course teaches how to design response actions and abatement projects. It also covers basic concepts of architectural design, engineering controls and proper work practices as required by the regulation.

Contractors/Supervisors -- Contractors/supervisors must complete a minimum of five days (40 hours) of training. The course teaches proper work practices and procedures and covers contractor issues such as legal liability,

contract specifications, insurance and bonding, and air monitoring. The course fulfills the OSHA "competent person" training requirement and the NESHAP "trained representative" requirement.

Asbestos Workers -- An asbestos worker must complete a minimum of four days (32 hours) of training. The course covers work practices and procedures, personal protective equipment, health effects of asbestos exposure, and other information critical to individuals who work in an abatement area with hazardous materials.

Update Training

All project designers, contractors/supervisor, and asbestos workers must complete a one day annual refresher training course for reaccreditation. Building inspectors must complete a half-day refresher course. Management planners must attend the half-day building inspector refresher course as well as a half-day management planner refresher course. Documentation of any annual training should be kept in the management plan.

Although not specifically required by the AHERA Rule, annual refresher/update training for maintenance workers is recommended. OSHA requires annual training.

Recordkeeping of Management Plans

Under § 763.93(g) of the AHERA Rule, each LEA is required to keep in its administrative office a copy of the management plans for each school. The management plan must be available, without cost or restriction, for inspection by the public, including teachers, other school personnel and their representatives, and parents, as well as by representatives of EPA and the State.

In addition, each school is required to maintain in its administrative office a complete and updated copy of the management plan for that school. The school must make the plan available for inspection to those individuals listed above as well as to workers before work begins in any area of a school building.

It is the responsibility of the LEA designated person to ensure that complete and up-to-date records are maintained and included in the management plan. Section 763.94 of the AHERA Rule requires that the LEA maintain the following records

Training Information

For each person required to be trained under §§ 763.92(a)(1) and (2) of the AHERA Rule (maintenance and custodial worker training), the LEA must provide:

- The person's name and job title
- The date that training was completed
- The location of the training
- The number of hours completed in the training

Periodic Surveillance Information

Each time that periodic surveillance is conducted under § 763.92(b) of the AHERA Rule, the LEA must record:

- The name of each person conducting the surveillance
- The date of the surveillance
- Any changes in the conditions of the materials being examined

Cleaning Information

Each time that cleaning, as required under § 763.91(c), is conducted, the LEA must record:

- The name of each person performing the cleaning
- The date of the cleaning
- The locations cleaned
- The methods used to perform the cleaning

Small-Scale, Short-Duration O&M Activity Information

Each time that O&M activities under § 763.91(d) of the AHERA Rule are performed, the LEA must provide:

- The name of each person performing the activity
- The start and completion date of the activity
- The locations where such activity occurred
- A description of the activity, including the preventive measures used
- If ACBM is removed, the name and disposal site of the ACBM

Information on O&M Activities Other Than Small-Scale, Short-Duration

Each time maintenance activities are performed that are not of small scale and short duration under § 763.91(e) of the AHERA Rule, the LEA must provide:

- The name and signature of each person performing the activity
- The State, accreditation number, and training provider name of each person performing the activity (a copy of a certificate is ideal)
- The start and completion dates of the activity
- A description of the activity, including preventive measures used
- If the ACBM is removed, the name and location of the ACBM storage or disposal site

Information on Fiber Release Episodes

For each fiber release episode occurring as the result of O&M activities, the LEA must provide:

- The date and location of the episode
- The method of repair, preventive measures or response action taken
- The name of each person performing the work
- If ACBM is removed, the name and location of the ACBM storage or disposal site

Information on Response Actions and Preventive Measures

For each preventive measure and response action taken for friable and nonfriable ACBM and friable and nonfriable suspected ACBM assumed to be ACBM, the LEA must provide:

- A detailed written description of the measure or action, including the method used
- The location where the measure or action was taken
- Reasons for selecting the measure or action
- The start and completion dates of the work
- If applicable, the names and addresses of all contractors involved with the work
- If applicable, the State, accreditation number, and training provider name of all contractors involved with the work (a copy of the certificate)
- If ACBM is removed, the name and location of the ACBM storage or disposal site

Air Sampling Information

In addition to the information required to be provided for each preventive measure and response action taken for friable and nonfriable ACBM and friable and nonfriable suspected ACBM assumed to be ACBM (*See above*), when air sampling is performed for final air clearance of response actions, the LEA must provide:

- The name and signature of any person collecting any air sample required to be collected at the completion of a response action
- The locations where samples were collected
- The date(s) of collection
- The name and address of the laboratory analyzing the samples
- The date(s) of analysis
- The results of the analysis
- The method of analysis
- The name and signature of the person performing the analysis
- A statement that the laboratory is NVLAP accredited or EPA approved

Additional Regulatory Agency’s Governing Asbestos

Although AHERA and its implementing regulations, the AHERA Rule, set out many of the responsibilities of the LEA, there are several other federal regulations that the LEA should be aware of when implementing an asbestos management program. These regulations include:

- National Emission Standards for Hazardous Air Pollutants (NESHAP)
- Occupational Safety and Health Administration (OSHA) Construction Industry Standard (29 CFR 1926.1101) and General Industry Standard (29 CFR 1910.1001)
- The EPA Worker Protection Rule (40 CFR § 763.121)
- Department of Transportation (DOT) regulations governing the transport and disposal of asbestos-containing materials (49 CFR Parts 171 and 172)

Each of these regulations is discussed in greater detail below. By following the requirements of these related regulations, the LEA can protect not only the people in its buildings from negative health effects but also may protect itself from legal liability. These regulations should be considered to establish minimum standards; going beyond these requirements may help keep buildings as safe as possible.

National Emission Standards for Hazardous Air Pollutants

The LEA (school district) must comply with the National Emission Standards for Hazardous Air Pollutants for Asbestos (NESHAP) regulations when removing asbestos materials. These regulations specify control requirements for most asbestos emissions, and include work practices to be followed to minimize the release of asbestos fibers during the handling, removal and disposal of asbestos waste materials. NESHAP regulations are frequently enforced by the State or Local Agencies.

A significant term, which is used through NESHAP, is Regulated Asbestos-Containing Materials (RACM). RACM is where the amount of friable asbestos-containing material equals or exceeds the threshold amount of 260 linear feet, 160 square feet, or 35 cubic feet.

Prior to the beginning work, an AHERA accredited inspector must inspect the facility for the presence of asbestos. The amount and type of asbestos present both determine whether the LEA must notify EPA (or delegated states) and what procedures that the LEA must follow to control asbestos emissions. If the amount exceeds the regulatory threshold, then a written notification must be submitted ten working days prior to any asbestos stripping or removal operation or demolition operation. The LEA must remove RACM from the facility that is to be demolished or renovated before any other activity begins that would break up, dislodge, or similarly disturb this material. The RACM must be handled in accordance with the asbestos NESHAP regulations, including properly labeling the waste. However, prior removal is not required if the RACM is in a condition that is excepted from prior removal, e.g., it is on a facility component that is encased in concrete or other similarly hard material and is adequately wet whenever exposed during demolition.

Of particular importance to the LEA are the standards for the demolition and renovation of facilities (40 CFR § 61.145) and for waste disposal for demolition and renovation operations (40 CFR § 61.150). The standard for asbestos waste disposal for demolition and renovation operations require that the LEA to: (1) discharge no visible emissions to the outside air during the collection processing, packaging, or transporting of any asbestos-containing waste material; (2) adequately wet the asbestos-containing waste material; (3) process the asbestos-containing waste material into nonfriable forms; or (4) use an alternative emission control and waste treatment method that has received prior approval by EPA or the delegated state.

As soon as possible, all asbestos-containing waste material must be taken to an asbestos waste disposal site or an EPA-approved site that converts regulated asbestos-containing material and asbestos-containing waste material into asbestos-free material as provided by law. If non-RACM will not be made friable during the disposal processes, it may be disposed of at a landfill that accepts normal building debris. Waste shipment records (WSRs), which are only required for RACM, must be maintained by the LEA and contain the information required by law. The WSRs must be retained for at least two years.

Occupational Safety and Health Administration

The Occupational Safety and Health Administration's (OSHA) Construction Industry Standard (29 CFR § 1926.1101) and General Industry Standard (29 CFR § 1910.1001) establish minimum standards for the protection of workers involved in asbestos-related work or employees exposed to asbestos-contaminated workplaces. OSHA regulations exclude federal, state, or local government employees (including public school employees) from its worker protection rules (except in states with OSHA approved programs).

However, EPA has promulgated Worker Protection Rules to cover these employees (see below). These standards include required work practices, engineering controls, permissible exposure limits, written programs for respiratory protection and medical surveillance, methods for compliance, hazard communication, housekeeping, competent person training and responsibilities, and required recordkeeping. Also included are demolition, removal, alteration, repair, maintenance (such as custodial workers who clean vinyl asbestos tile floors), installation, clean-up of spills, transportation, disposal and storage of asbestos.

OSHA revised its standards on August 10, 1994. Significant changes to the standards included the following:

- PEL decrease to 0.1 f/cc; action level deleted;
- Asbestos Containing Material defined as material containing more than 1% asbestos (now consistent with EPA);
- Building owners are now covered and have specific duties to identify building materials and notify/communicate with others;

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- All asbestos work, regardless of exposure levels, requires at least basic controls and work practices, and exposure monitoring;
- Construction work is classified according to friability of the asbestos and hazardousness of the operation. Increasingly friable and hazardous operations require increasingly stringent engineering controls, work practices, protective equipment, training and monitoring; and
- Training requirements changed to correspond to EPA training.

Two programs are of particular importance to the LEA. OSHA requires establishment of a respiratory protection program (29 CFR § 1910.134) that is designed to protect persons, including the designated person and any employees, who do any work with ACBM. The program requires that such persons be equipped with a respirator that provides adequate protection against asbestos. Further, the program must include written standard operating procedures governing the selection and use of respirators, selection of respirators based on the hazards to which workers are exposed, an instruction and training program in the proper use of respirators and its limitations, and requirements for the cleaning, disinfecting, inspecting, and storing of respirators. The written program must be on the job site when asbestos work is being conducted.

The second program is the medical surveillance program, which requires that every person who is assigned to work using a respirator must first have a medical examination to determine whether he or she is fit to work in a respirator. A written assurance to that effect signed by the examining physician is required and must be maintained with the employee's medical surveillance records. The employer must keep proof of a medical surveillance program on site where the asbestos work is being performed.

EPA Worker Protection Rule

The OSHA asbestos standards do not cover all state and local government employees. The EPA Worker Protection Rule (40 CFR § 763.121) extends the protection afforded by the OSHA standards to all state and local government employees who are engaged in asbestos abatement and who are not otherwise covered by OSHA or an OSHA-approved state plan.

Thus, when conducting asbestos abatement activities, an employee of a school district is either covered by the OSHA asbestos standards or that employee is protected by EPA's Worker Protection Rule.

Department of Transportation Regulations

Department of Transportation (DOT) regulations (49 CFR Parts 171 and 172) require that asbestos-containing materials be labeled as Class 9 hazardous materials and establish requirements relating to the shipment of ACBM by air, rail or motor vehicles, including the type of packaging, labeling, shipping papers and placards required. The designated person is responsible for having the ACBM properly transported from a site. The LEA is the generator of the waste product and maintains this responsibility during transportation and disposal. Disposal of asbestos waste also is subject to each state's solid waste regulations.

Asbestos

Health Effects / Exposure Information

Health Effects Associated with Asbestos Exposure

The health effects associated with asbestos exposure have been studied for many years. Results of these studies show that inhalation (breathing in) of asbestos fibers leads to increased risk of developing several diseases. Exactly why some people develop these diseases remains a mystery, but it has been well demonstrated that most asbestos-related illnesses are dose-response related (*i.e.*, the greater the exposure to airborne asbestos fibers, the greater the risk of developing an illness).

Relative Hazards of Asbestos Exposure

Almost daily, we are exposed to some prevailing level of asbestos fibers in buildings or experience some existing level in the outdoor air. Some fibers that are inhaled remain in the lungs. Brief "bursts" of exposure, when added to the background level, increase the potential to cause or trigger the development of an asbestos related disease. These brief bursts of exposure occur in many ways. For example, when a carpenter drills a hole in an asbestos fire door without taking any precautions, an increased amount of asbestos may be released into the air. The more often these bursts of exposure occur, the greater the risk of breathing asbestos fibers.

People most at risk for this additional exposure are maintenance and construction workers who work on and disturb asbestos in buildings. This clearly demonstrates the need for an active asbestos policy and an ongoing operations and maintenance (O&M) plan for buildings that contain ACM.

It is important to recognize that the majority of people who have developed diseases because of asbestos exposures are former asbestos workers. These workers were frequently exposed to high levels of asbestos fibers each working day, with little or no protection. Today's asbestos maintenance workers and AHERA-trained asbestos abatement workers are trained to follow specific work practices and wear appropriate protection, including respirators, to minimize the risk of exposure. However, increased risk may occur when a worker who does not use a respirator or follow specific work practices disturbs any ACM.

The Respiratory System

The effects of asbestos exposure most often involve the lungs. Air breathed into the body passes through the mouth and nose, continuing into the windpipe. The windpipe divides into smaller and smaller tubes that end up in the lungs as air sacs called alveoli. It is in these air sacs that respiration occurs. Oxygen is absorbed into tiny blood vessels (or capillaries), and waste gases, such as carbon dioxide, pass out of the blood and are exhaled.

The body has several mechanisms to "filter" the air it breathes. First, large particles are removed in the nose and mouth. Many smaller particles are caught on the mucus-coated walls of the airway tubes. These airways have "hairy" linings (ciliated cells) that constantly propel mucus upward. Particles caught in the mucus are swept up into the back of the mouth. From here they are swallowed or expelled (spit out). Unfortunately, cigarette smoking temporarily paralyzes these hair-like cells, disabling one of the body's natural defenses against unwanted dust or fibers.

Despite natural bodily defenses, some dust particles inevitably reach the tiny air sacs in the lungs. When this occurs the human immune system dispatches large cells called macrophages to engulf the particles and "digest" them. These cells deposit a coating on the particles and may begin forming scar tissue around them. This is just another natural defense mechanism the body uses against unwanted debris in the lungs.

Asbestos-Related Diseases

If the body's defenses fail to control or remove asbestos fibers that enter the lungs, the risk of developing an asbestos-related disease increases. Asbestos-related diseases include asbestosis, lung cancer, mesothelioma, and other cancers.

- **Asbestosis** -- Asbestosis is a disease characterized by lung scarring. It reduces lung elasticity -- the ability to inhale and exhale in response to muscular contractions of the diaphragm -- and makes breathing very difficult. Asbestosis is most common among workers who have been exposed to large amounts of asbestos fibers over a period of time. It is a serious disease and, in those persons exposed to high levels of asbestos, can eventually lead to disability or death. All forms of asbestos are suspected to have the potential to cause asbestosis. Like all diseases associated with asbestos exposure, it may take many years for the disease to show up. The typical latency period for asbestosis is 15 to 30 years. Available data indicate that the frequency of occurrence of asbestosis rises and the disease worsens with increasing dust exposure. The Occupational Safety and Health Administration (OSHA) Asbestos Standards were developed to minimize the incidence of asbestosis among asbestos workers by reducing their exposure to asbestos.

- **Lung Cancer** -- As with asbestosis, there appears to be a dose-response relationship between asbestos exposure and lung cancer. In addition, lung cancer arising from asbestos exposure also has a latency period before development -- typically 30 years or longer. The risk of contracting lung cancer as a result of exposure to asbestos increases if the worker is a cigarette smoker. Cigarette smokers who are exposed to asbestos are over 50 times more likely to develop lung cancer than the normal, non-smoking population. As a result, a program to help workers stop smoking and an asbestos operations and maintenance program will help reduce the risk of lung cancer among asbestos maintenance workers.

- **Mesothelioma** -- Mesothelioma is a cancer that occurs in the chest cavity lining or in the lining of the abdominal (stomach) lining. This type of cancer spreads rapidly and is always fatal. Cases of mesothelioma have been found in people who have had a limited exposure to asbestos. The onset of this disease appears to be independent of smoking behavior but related to dose and to time from first known asbestos exposure. Mesothelioma tends to have a long latency period -- usually 30 to 40 years.

- **Other Diseases** -- Several other diseases seem to occur more frequently among people who have been exposed to asbestos. These include cancer of the esophagus, stomach, colon, and pancreas; pleural (fibrous) plaques; pleural thickening; and pleural effusion.

The risks of contracting any of these diseases make it extremely important that asbestos maintenance workers utilize proper work practices and respiratory protection.

Risks Associated with Low Exposure

While studies of asbestos workers and laboratory animals clearly reveal that asbestos is hazardous, the risks associated with low-level, non-occupational exposure (*i.e.*, an occupant of a building who is not actually disturbing the asbestos) have not been directly demonstrated. Estimating low-level risks from exposure data is not a straightforward process, and the validity of current methodologies is questionable.

Based on a thorough review of the literature available on the health effects of asbestos, the National Institute for Occupational Safety and Health (NIOSH) has concluded that there is no level below which the risks of contracting an asbestos-related disease are zero. This means that there is no established safe level of exposure to asbestos.

Glossary of Terms

Air erosion: the passage of air over friable ACBM which may result in the release of asbestos fibers.

Asbestos: the asbestiform varieties of Chrysotile; crocidolite; amosite; anthophyllite; tremolite; and actinolite.

Asbestos-containing material (ACM): any material or product which contains more than 1 percent asbestos.

Asbestos-containing building material (ACBM): surfacing ACM, thermal system insulation ACM, or miscellaneous ACM that is found in or on interior structural members or other parts of a school building.

Asbestos debris: pieces of ACBM that can be identified by color, texture, or composition, or means dust, if the dust is determined by an accredited inspector to be ACM.

Damaged friable miscellaneous ACM: friable miscellaneous ACM which has deteriorated or sustained physical injury such that the internal structure (cohesion) of the material is inadequate or, if applicable, which has delaminated such that its bond to the substrate (adhesion) is inadequate or which for any other reason lacks fiber cohesion or adhesion qualities. Such damage or deterioration may be illustrated by the separation of ACM into layers; separation of ACM from the substrate; flaking, blistering, or crumbling of the ACM surface; water damage; significant or repeated water stains, scrapes, gouges, mars or other signs of physical injury on the ACM. Asbestos debris originating from the ACBM in question may also indicate damage.

Damaged friable surfacing ACM: friable surfacing ACM which has deteriorated or sustained physical injury such that the internal structure (cohesion) of the material is inadequate or which has delaminated such that its bond to the substrate (adhesion) is inadequate, or which, for any other reason, lacks fiber cohesion or adhesion qualities. Such damage or deterioration may be illustrated by the separation of ACM into layers; separation of ACM from the substrate; flaking, blistering, or crumbling of the ACM surface; water damage; significant or repeated water stains, scrapes, gouges, mars or other signs of physical injury on the ACM. Asbestos debris originating from the ACBM in question may also indicate damage.

Damaged or significantly damaged thermal system insulation ACM: thermal system insulation ACM on pipes, boilers, tanks, ducts, and other thermal system insulation equipment where the insulation has lost its structural integrity, or its covering, in whole or in part, is crushed, water-stained, gouged, punctured, missing, or not intact such that it is not able to contain fibers. Damage may be further illustrated by occasional punctures, gouges or other signs of physical injury to ACM; occasional water damage on the protective coverings/jackets; or exposed ACM ends or joints. Asbestos debris originating from the ACBM in question may also indicate damage.

Encapsulation: the treatment of ACBM with a material that surrounds or embeds asbestos fibers in an adhesive matrix to prevent the release of fibers, as the encapsulant creates a membrane over the surface (bridging encapsulant) or penetrates the material and binds its components together (penetrating encapsulant).

Enclosure: an airtight, impermeable, permanent barrier around ACBM to prevent the release of asbestos fibers into the air.

EPA Worker Protection Rule: extends the protection afforded by OSHA to all employees in asbestos abatement who may have been excluded from protection by OSHA.

Fiber release episode: any uncontrolled or unintentional disturbance of ACBM resulting in visible emission.

Friable: when referring to material in a school building means that the material, when dry, may be crumbled, pulverized, or reduced to powder by hand pressure, and includes previously non-friable material after such previously non-friable material becomes damaged to the extent that when dry it may be crumbled, pulverized, or reduced to powder by hand pressure.

Friable asbestos-containing material (ACM): any material containing more than one percent asbestos which has been applied on ceilings, walls, structural members, piping, duct work, or any other part of a building, which when dry, may be crumbled, pulverized, or reduced to powder by hand pressure. Includes non-friable asbestos-containing material after such previously non-friable material becomes damaged to the extent that when dry it may be crumbled, pulverized, or reduced to powder by hand pressure.

Friable asbestos-containing building material (ACBM): any friable ACM that is in or on interior structural members or other parts of a school or public and commercial building.

Functional space: a room, group of rooms, or homogeneous area (including crawl spaces or the space between a dropped ceiling and the floor or roof deck above), such as classroom(s), a cafeteria, gymnasium, hallway(s), designated by a person accredited to prepare management plans, design abatement projects, or conduct response actions.

High-efficiency particulate air (HEPA): refers to a filtering system capable of trapping and retaining at least 99.97 percent of all mono dispersed particles 0.3 mm in diameter or larger.

Homogeneous area: an area of surfacing material, thermal system insulation material, or miscellaneous material that is uniform in color and texture.

Inspection: an activity undertaken in a school building, or a public and commercial building, to determine the presence or location, or to assess the condition of, friable or non-friable asbestos-containing building material (ACBM) or suspected ACBM, whether by visual or physical examination, or by collecting samples of such material. This term includes re-inspections of friable and non-friable known or assumed ACBM which has been previously identified. The term does not include the following: (1) Periodic surveillance of the type described in 40 CFR 763.92(b) solely for the purpose of recording or reporting a change in the condition of known or assumed ACBM; (2) Inspections performed by employees or agents of Federal, State, or local government solely for the purpose of determining compliance with applicable statutes or regulations; or (3) Visual inspections of the type described in 40 CFR 763.90(i) solely for the purpose of determining completion of response actions.

Local education agency: (1) Any local educational agency as defined in section 198 of the Elementary and Secondary Education Act of 1965 (20 U.S.C. 3381). (2) The owner of any nonpublic, nonprofit elementary, or secondary school building. (3) The governing authority of any school operated under the defense dependents' education system provided for under the Defense Dependents' Education Act of 1978 (20 U.S.C. 921, et seq.).

Major fiber release episode: any uncontrolled or unintentional disturbance of ACBM, resulting in a visible emission, which involves the falling or dislodging of more than 3 square or linear feet of friable ACBM.

Management Plan: a site-specific guidance document that the LEA designated person must follow in managing the ACBM present in a school building.

Minor fiber release episode: any uncontrolled or unintentional disturbance of ACBM, resulting in a visible emission, which involves the falling or dislodging of 3 square or linear feet or less of friable ACBM.

Miscellaneous ACM: other, mostly non-friable ACM, products and materials (found on structural components, structural members or fixtures) such as floor tile, ceiling tile, construction mastic for floor and ceiling materials, sheet flooring, fire doors, asbestos cement pipe and board, wallboard, acoustical wall tile, and vibration damping cloth. miscellaneous material that is ACM in a school building.

Miscellaneous material: interior building material on structural components, structural members or fixtures, such as floor and ceiling tiles, and does not include surfacing material or thermal system insulation.

Non-friable: material in a school building which when dry may not be crumbled, pulverized, or reduced to powder by hand pressure.

Operations and maintenance program: a program of work practices to maintain friable ACBM in good condition, ensure clean up of asbestos fibers previously released, and prevent further release by minimizing and controlling friable ACBM disturbance or damage.

Potential damage: circumstances in which:

- (1) Friable ACBM is in an area regularly used by building occupants, including maintenance personnel, in the course of their normal activities.
- (2) There are indications that there is a reasonable likelihood that the material or its covering will become damaged, deteriorated, or delaminated due to factors such as changes in building use, changes in operations and maintenance practices, changes in occupancy, or recurrent damage.

Potential significant damage: circumstances in which:

- (1) Friable ACBM is in an area regularly used by building occupants, including maintenance personnel, in the course of their normal activities.
- (2) There are indications that there is a reasonable likelihood that the material or its covering will become significantly damaged, deteriorated, or delaminated due to factors such as changes in building use, changes in operations and maintenance practices, changes in occupancy, or recurrent damage.
- (3) The material is subject to major or continuing disturbance, due to factors including, but not limited to, accessibility or, under certain circumstances, vibration or air erosion.

Preventive measures: actions taken to reduce disturbance of ACBM or otherwise eliminate the reasonable likelihood of the material's becoming damaged or significantly damaged.

Public and commercial building: the interior space of any building which is not a school building, except that the term does not include any residential apartment building of fewer than 10 units or detached single-family homes. The term includes, but is not limited to: industrial and office buildings, residential apartment buildings and condominiums of 10 or more dwelling units, government-owned buildings, colleges, museums, airports, hospitals, churches, preschools, stores, warehouses and factories. Interior space includes exterior hallways connecting buildings, porticos, and mechanical systems used to condition interior space.

Removal: the taking out or the stripping of substantially all ACBM from a damaged area, a functional space, or a homogeneous area in a school building.

Repair: returning damaged ACBM to an undamaged condition or to an intact state so as to prevent fiber release.

Response action: a method, including removal, encapsulation, enclosure, repair, operations and maintenance, that protects human health and the environment from friable ACBM.

Routine maintenance area: an area, such as a boiler room or mechanical room, that is not normally frequented by students and in which maintenance employees or contract workers regularly conduct maintenance activities.

School: any elementary or secondary school as defined in section 198 of the Elementary and Secondary Education Act of 1965 (20 U.S.C. 2854).

School building: (1) Any structure suitable for use as a classroom, including a school facility such as a laboratory, library, school eating facility, or facility used for the preparation of food. (2) Any gymnasium or other facility which is specially designed for athletic or recreational activities for an academic course in physical education. (3) Any other facility used for the instruction or housing of students or for the administration of educational or research programs.

(4) Any maintenance, storage, or utility facility, including any hallway, essential to the operation of any facility described in this definition of "school building" under paragraphs (1), (2), or (3).

(5) Any portico or covered exterior hallway or walkway.(6) Any exterior portion of a mechanical system used to condition interior space.

Significantly damaged friable miscellaneous ACM: damaged friable miscellaneous ACM where the damage is extensive and severe.

Significantly damaged friable surfacing ACM: damaged friable surfacing ACM in a functional space where the damage is extensive and severe.

Small-scale, short-duration activities (SSSD): tasks such as, but not limited to:(1) Removal of asbestos-containing insulation on pipes.(2) Removal of small quantities of asbestos-containing insulation on beams or above ceilings.(3) Replacement of an asbestos-containing gasket on a valve.(4) Installation or removal of a small section of drywall.(5) Installation of electrical conduits through or proximate to asbestos-containing materials.

SSSD can be further defined by the following considerations: (1) Removal of small quantities of ACM only if required in the performance of another maintenance activity not intended as asbestos abatement. (2) Removal of asbestos-containing thermal system insulation not to exceed amounts greater than those which can be contained in a single glove bag. (3) Minor repairs to damaged thermal system insulation which do not require removal. (4) Repairs to a piece of asbestos-containing wallboard. (5) Repairs, involving encapsulation, enclosure, or removal, to small amounts of friable ACM only if required in the performance of emergency or routine maintenance activity and not intended solely as asbestos abatement. Such work may not exceed amounts greater than those which can be contained in a single prefabricated mini-enclosure. Such an enclosure shall conform spatially and geometrically to the localized work area, in order to perform its intended containment function.

Surfacing ACM: interior ACM that has been sprayed on, troweled on, or otherwise applied to surfaces (structural members, walls, ceilings, etc.) for acoustical, decorative, fireproofing, or other purposes. surfacing material that is ACM.

Surfacing material: material in a school building that is sprayed-on, troweled-on, or otherwise applied to surfaces, such as acoustical plaster on ceilings and fireproofing materials on structural members, or other materials on surfaces for acoustical, fireproofing, or other purposes.

Thermal system insulation: material in a school building applied to pipes, fittings, boilers, breeching, tanks, ducts, or other interior structural components to prevent heat loss or gain, or water condensation, or for other purposes.

Thermal system insulation ACM: insulation used to control heat transfer or prevent condensation on pipes and pipe fittings, boilers, breeching, tanks, ducts, and other parts of hot and cold water systems; heating, ventilation, and air-conditioning (HVAC) systems; or other mechanical systems that is ACM.

Vibration: the periodic motion of friable ACBM which may result in the release of asbestos fibers.

Acronyms

ACM: Asbestos-Containing Material
ACBM: Asbestos-Containing Building Material
AHERA: Asbestos Hazardous Emergency Response Act
ASHARA: Asbestos School Hazard Abatement Reauthorization Act
DOT: Department of Transportation
EPA: Environmental Protection Agency
HEPA: High Efficiency Particulate Air
HVAC: Heating, Ventilation and Air-Conditioning
LEA: Local Education Agency
MAP: Asbestos Model Accreditation Plan
NESHAP: National Emission Standard for Hazardous Air Pollutants
NIOSH: National Institute of Occupational Safety and Health
O&M: Operations and Maintenance
OSHA: Occupational Safety and Health Administration
PCM: Phase Contrast Microscopy
PLM: Polarized Light Microscopy
SSSD: Small Scale, Short Duration
TEM: Transmission Electron Microscopy
TSI: Thermal System Insulation
VAT: Vinyl Asbestos Tile
VOC: Volatile Organic Compounds

DEHESA SCHOOL DISTRICT

To: Members of the Board
From: Nancy Hauer
Subject: **Material Revision for Inspire School South**

Meeting Date: January 15, 2019

- Action
- First Reading
- Information
- Presentation
- Discussion
- Public Hearing
- Roll Call Vote Required

Background:

The District approved Inspire Charter School South in 2015.

Report:

Inspire Charter School South is requesting a material revision to add an out of county resource center. The address of the out of county resource center will be 27652 Camino Capistrano, Laguna Niguel, CA 92677. A Public Hearing was held on December 13, 2018.

Financial Impact:

There is no financial impact.

Student Impact:

The addition of an out of county resource center will allow students to access programs and educational facilitators in a central location.

Recommendation:

It is recommended that the Governing Board approve the Material Revision for Inspire School South.

Agenda Item #: VII.C.1

except after thirty (30) days prior written notice by certified mail, return receipt requested, has been given to the District.

Administrative Services

Governing Law: the manner in which administrative services of the School are to be provided (Education Code Section 47605(g)).

The Executive Director and Director of Academic Services will assume the lead responsibility for administering the Charter School under the policies adopted by the Charter School's Board of Directors. The Charter School will contract with an appropriate third-party for all "back-office" administrative services, including but not limited to financial management, personnel, and instructional program development. Initially, the Charter School intends to utilize Charter Impact, Inc. to provide financial management, accounting, and payroll services. Its experience is described in the section on consultants, above. Charter Impact, Inc. shall assist the Charter School Board by providing budget development, implementation of the adopted budget, and monitoring expenses to ensure that the Charter School Board remains informed about the continuing fiscal solvency of the Charter School.

Facilities

Governing Law: the facilities to be utilized by the school. The description of facilities to be used by the charter school within the District attendance boundaries. (Education Code Section 47605(g))

The Charter School will locate an administrative office/meeting space within the District attendance boundaries for charter oversight, teacher/staff meetings, and trainings. The school will open one adjacent county resource center in Orange County at the address of 27652 Camino Capistrano, Laguna Niguel, CA 92677. This resource center is in accord with the recent Shasta Case, as it is in an adjacent county.

DEHESA SCHOOL DISTRICT

To: Members of the Board
From: Nancy Hauer
Subject: Occupational Therapist Contract

Meeting Date: January 15, 2019

- Action
- First Reading
- Information
- Presentation
- Discussion
- Public Hearing
- Roll Call Vote Required

Background:

Prior to the 2009-2010 school year, our students who required Occupational Therapy (OT) were placed in special day classrooms in Cajon Valley. Because we now educate nearly all of our students at Dehesa and service their IEP Goals on site, we occasionally need to have a student assessed for OT, and do have students whose IEP Goals call for OT services. This is a legal requirement and having a contract with a qualified OT is important.

Report:

The District has had a contract with Purposeful Play since the 2009-10 school year, and this is a renewal of the existing contract.

Financial Impact:

The OT rate is \$95.00 per hour for services and \$315.00 for an OT assessment. The total financial impact is unknown but we currently have a six students who need weekly services. The OT services are funded through the special education funding and the amount of time varies depending on the number of students needing services. Rates have not increased for the 2018-19 school year.

Student Impact:

OT services help students be more successful in the classroom and also the OT provider provides the classroom teachers with professional development and training that helps the teacher know how to better meet the child's needs. We are fortunate to continue service with the same Occupational Therapist.

Recommendation:

It is recommended that the Governing Board approve the contract with the Occupational Therapist provider to ensure the District is in compliance with special education law and guidelines.

Agenda Item #: VII.C.2

INDEPENDENT CONTRACTOR AGREEMENT

This Independent Contractor Agreement (the "Agreement") is made and entered between Purposeful Play, Inc., an independent contractor hereafter referred to as "Contractor", and Dehesa School District, hereafter referred to as "School". In consideration of the covenants and conditions hereinafter set forth, School and Contractor agree as follows:

1. SERVICES

Contractor shall perform the following services for the School (the "Work") as the School deems warranted:

- a.) Individual or group Occupational therapy treatment to address IEP goals
- b.) Occupational therapy evaluation
- c.) Consultation with teachers/staff/parents, attending IEP meetings, presentations, preparation/ordering of requested materials, and preparation of IEP goals/objectives as requested by the School

2. REPORTING/PROGRESS REPORT

Contractor shall report to Nancy Hauer periodically as deemed necessary by School via email or phone. Contractor shall provide a periodic progress reports aligned with students' report cards to the School on each pupil's progress in treatment. Evaluation reports shall be completed and given to School according to deadlines set with the IEP team. Consultation notes will also be kept to by the contractor for information shared between teachers, parents, or other staff at the School.

3. TERM

This Agreement shall commence on 8/27/18 and shall expire on 8/26/19. Contractor agrees to perform services for the Work to School on or before the expiration of the term set forth above. The School may terminate the use of Contractor's services at any time without cause and without further obligation to Contractor except for payment due for services prior to date of such termination. Termination of this Agreement or termination of services shall not affect the provisions under Sections 5-11, hereof, which shall survive any termination.

4. PAYMENT

Contractor will be paid for Work performed under this Agreement as follows:

- a.) \$95/session for individual Occupational therapy (1/2 hour or one hour session)
- b.) \$50/pupil per session of group Occupational therapy (2 pupil minimum, one hour session)
- c.) \$315/Occupational therapy evaluation (includes all report writing, evaluation of pupil, initial consultation with teacher/parents)
- d.) \$95/hour for services describes in section (c) of SERVICES in contract. This will be billed in increments of 15 minutes (.25).
- e.) Travel time to and from school site and within school site shall not be considered billable.

Contractor will submit an invoice for the Work on the last day of service on a quarterly basis or as requested by the School. Invoices shall be paid by the School within 15 business days of receipt.

5. CONFIDENTIALITY AND OWNERSHIP

(a) Contractor recognizes and acknowledges that the School possesses certain confidential information that constitutes a valuable, special, and unique asset. As used herein, the term "confidential information" includes all information and materials belonging to, used by, or in the possession of the School relating to its products, processes, services, technology, inventions, patents, ideas, contracts, financial information, developments, business strategies, pricing, current and prospective customers, marketing plans, and trade secrets of every kind and character, but shall not include (a) information that was already within the public domain at the time the information is acquired by Contractor, or (b) information that subsequently becomes public through no act or omission of the Contractor. Contractor agrees that all of the confidential information is and shall continue to be the exclusive property of the School, whether or not prepared in whole or in part by Contractor and whether or not disclosed to or entrusted to Contractor's custody. Contractor agrees that Contractor shall not, at any time following the execution of this Agreement, use or disclose in any manner any confidential information of the School.

(b) To the extent any inventions, technologies, reports, memoranda, studies, writings, articles, plans, designs, specifications, exhibits, software code, or other materials prepared by Contractor in the performance of services under this Agreement include material subject to copyright protection, such materials have been specially commissioned by the School and they shall be deemed "work for hire" as such term is defined under U.S. copyright law. To the extent any such materials do not qualify as "work for hire" under applicable law, and to the extent they include material subject to copyright, patent, trade secret, or other proprietary rights protection, Contractor hereby irrevocably and exclusively assigns to the School, its successors, and assigns, all right, title, and interest in and to all such materials. To the extent any of Contractor rights in the same, including without limitation any moral rights, are not subject to assignment hereunder, Contractor hereby irrevocably and unconditionally waives all enforcement of such rights. Contractor shall execute and deliver such instruments and take such other actions as may be required to carry out and confirm the assignments contemplated by this paragraph and the remainder of this Agreement. All documents, magnetically or optically encoded media, and other tangible materials created by Contractor as part of its services under this Agreement shall be owned by the School.

6. RETURN OF MATERIALS

Contractor agrees that upon termination of this Agreement, Contractor will return to the School all drawings, blueprints, notes, memoranda, specifications, designs, writings, software, devices, documents and any other material containing or disclosing any confidential or proprietary information of the School. Contractor will not retain any such materials.

7. WARRANTIES

Contractor warrants that:

- (a) Contractor's agreement to perform the Work pursuant to this Agreement does not violate any agreement or obligation between Contractor and a third party; and
- (b) The Work as delivered to the School will not infringe any copyright, patent, trade secret, or other proprietary right held by any third party; and
- (c) The services provided by Contractor shall be performed in a professional manner, and shall be of a high grade, nature, and quality. The services shall be performed in a timely manner and shall meet deadlines agreed between Contractor and the School.

8. INDEMNITY

Contractor agrees to indemnify, defend, and hold the School and its successors, officers, directors, agents and employees harmless from any and all actions, causes of action, claims, demands, cost, liabilities, expenses and damages (including attorneys' fees) arising out of, or in connection with any breach of this Agreement by Contractor.

9. RELATIONSHIP OF PARTIES

Contractor is an independent contractor of the School. Nothing in this Agreement shall be construed as creating an employer-employee relationship, as a guarantee of future employment or engagement, or as a limitation upon the School's sole discretion to terminate this Agreement at any time without cause. Contractor further agrees to be responsible for all of Contractor's federal and state taxes, withholding, social security, insurance, and other benefits. Contractor shall provide the School with satisfactory proof of independent contractor status.

10. OTHER ACTIVITIES

Contractor is free to engage in other independent contracting activities, provided that Contractor does not engage in any such activities which are inconsistent with or in conflict with any provisions hereof, or that so occupy Contractor's attention as to interfere with the proper and efficient performance of Contractor's services thereunder. Contractor agrees not to induce or attempt to influence, directly or indirectly, any employee at the School to terminate his/her employment and work for Contractor or any other person.

11. MISCELLANEOUS

- (a) *Attorneys' Fees.* Should either party hereto, or any heir, personal representative, successor or assign of either party hereto, resort to legal proceedings in connection with this Agreement or Contractor's relationship with the School, the party or parties prevailing in such legal proceedings shall be entitled, in addition to such other relief as may be granted, to recover its or their reasonable attorneys' fees and costs in such legal proceedings from the non-prevailing party or parties.

- (b) *Governing Law.* This Agreement shall be governed by and construed in accordance with the laws of the State of California without regard to conflict of law principles.
- (c) *Entire Agreement.* This Agreement, contains the entire agreement and understanding between the parties hereto and supersedes any prior or contemporaneous written or oral agreements, representations and warranties between them respecting the subject matter hereof.
- (d) *Amendment.* This Agreement may be amended only by a writing signed by Contractor and by a duly authorized representative of the School.
- (e) *Severability.* If any term, provision, covenant or condition of this Agreement, or the application thereof to any person, place or circumstance, shall be held to be invalid, unenforceable or void, the remainder of this Agreement and such term, provision, covenant or condition as applied to other persons, places and circumstances shall remain in full force and effect.
- (f) *Construction.* The headings and captions of this Agreement are provided for convenience only and are intended to have no effect in construing or interpreting this Agreement. The language in all parts of this Agreement shall be in all cases construed according to its fair meaning and not strictly for or against either party.
- (g) *Rights Cumulative.* The rights and remedies provided by this Agreement are cumulative, and the exercise of any right or remedy by either party hereto (or by its successor), whether pursuant to this Agreement, to any other agreement, or to law, shall not preclude or waive its right to exercise any or all other rights and remedies.
- (h) *Nonwaiver.* No failure or neglect of either party hereto in any instance to exercise any right, power or privilege hereunder or under law shall constitute a waiver of any other right, power or privilege or of the same right, power or privilege in any other instance. All waivers by either party hereto must be contained in a written instrument signed by the party to be charged and, in the case of the School, by an officer of the School or other person duly authorized by the School.
- (i) *Remedy for Breach.* The parties hereto agree that, in the event of breach or threatened breach of any covenants of Contractor, the damage or imminent damage to the value and the goodwill of the School's business shall be inestimable, and that therefore any remedy at law or in damages shall be inadequate. Accordingly, the parties hereto agree that the School shall be entitled to injunctive relief against Contractor in the event of any breach or threatened breach of any of such provisions by Contractor, in addition to any other relief (including damages) available to the School under this Agreement or under law.
- (j) *Notices.* Any notice, request, consent or approval required or permitted to be given under this Agreement or pursuant to law shall be sufficient if in writing, and if and when sent by certified or registered mail, with postage prepaid, to Contractor's residence (as noted below), or to the School's principal office, as the case may be.
- (k) *Assistance.* Contractor shall, during and after termination of services rendered, upon reasonable notice, furnish such information and proper assistance to the School as may reasonably be required by the School in connection with work performed by Contractor; provided, however, that such assistance following termination shall be furnished at the same level of compensation as provided in Section 2.

(l) *Disputes.* Any controversy, claim or dispute arising out of or relating to this Agreement or the relationship, either during the existence of the relationship or afterwards, between the parties hereto, their assignees, their affiliates, their attorneys, or agents, shall be litigated solely in state or federal court. Each party (1) submits to the jurisdiction of such court, (2) waives the defense of an inconvenient forum, (3) agrees that valid consent to service may be made by mailing or delivery of such service to the Secretary of State (the "Agent") or to the party at the party's last known address, if personal service delivery can not be easily effected, and (4) authorizes and directs the Agent to accept such service in the event that personal service delivery can not easily be effected. EACH PARTY, TO THE FULLEST EXTENT PERMITTED BY APPLICABLE LAW, HEREBY IRREVOCABLY WAIVES ALL RIGHT TO TRIAL BY JURY AS TO ANY ISSUE RELATING HERETO IN ANY ACTION, PROCEEDING, OR COUNTERCLAIM ARISING OUT OF OR RELATING TO THIS AGREEMENT OR ANY OTHER MATTER INVOLVING THE PARTIES HERETO.

School:

By: _____
[Signature]

Date: _____

Title:

Contractor:

By: Tad Bruneau, OTR/L
[Signature]

Date: _____

Name/Title: Tad Bruneau, OTR/L and Owner, Purposeful Play, Inc.

DEHESA SCHOOL DISTRICT

To: Members of the Board

From: Nancy Hauer

Subject: World of Work Grant

Meeting Date: January 15, 2019

- Action
- First Reading
- Information
- Presentation
- Discussion
- Public Hearing
- Roll Call Vote Required

Background:

The World of Work is an initiative aimed at early exposure for children to career paths. The World of Work focuses on integrating useful, real-world skills into everyday curriculum in a way that makes it beneficial for teachers and students. World of Work is focused on empowering every child to find their unique strengths, interests, and values needed in the world and nurturing happy kids, living in healthy relationships on a path to gainful employment.

Report:

Through a generous donation from the American Student Assistance, our district has an opportunity to receive funds through the World of Work Network. American Student Assistance® (ASA) is committed to helping kids know themselves, know their options, and make informed choices to achieve their education and career goals. The World of Work Network is comprised of education, nonprofits, business and government entities that focus on students' success throughout all phases of their working lives. These partners include San Diego County Office of Education, Classroom of the Future Foundation, San Diego Workforce Partnership, Eddywhere Cooperative, Vitanavis (Myers Briggs Corporation) and Nepris.

Financial Impact:

This Application would fund and support the program resources, digital subscriptions, and professional learning for implementing the World of Work K-12 career development resources.

Student Impact:

Will empower every student to find their unique strengths, interests, and values needed in the world. Will help students to make informed choices to achieve their education and career goals.

Recommendation:

It is recommended the Governing Board Approve this Intent to Apply for World of Work Grant.

Agenda Item #: VII.C.3



[Home](#)

[The World of Work](#)

[WoW For You](#)

[WoW Network](#)

[WoW Blog](#)

[CONTACT US](#)



Helping students find their place in the World of Work

The Workplace Disconnect

- 7 million unemployed; 6.2 million jobs
- 85% employees not engaged at work
- Millennial unemployment rate twice of national average
- Only 26% say their education is relevant to work



The World of Work Solves The Workplace Disconnect



4 Step World of Work Framework

1. Explore
2. Simulate
3. Meet A Pro
4. Practice

Prepare Your Child For The World of Work

Every child has unique strengths, interests and values that are needed in the world.

What is the World of Work all about?



The World of Work provides early exposure and self awareness aligned to career paths.



Builds student self-efficacy belief, aspirations for future learning and engagement



Helps families support their child to explore career paths that are best aligned to their interests and education



explore career paths that are best instruction focusing on student strengths and interests



877-717-2474

Visit www.worldofwork.net or email us at sales@worldofwork.net

WoW Framework: Mission of Me

Mission of Me is a 3-Core process that often repeats itself, as we constantly assess ourselves and our level of engagement, making changes and adjustments based on our own self-awareness, our unique academic and career journey to create our own story.



Student Profile: The Mission of Me

Students will enter high school or college with their own Mission of Me to help them select appropriate courses and pursue career paths that best suit them, and that they can be passionate about.

World of Work nurtures happy kids, living in healthy

relationships on a path to gainful employment.



[LOGIN](#)

World of Work Network is a space where teachers can access resources, partner platforms, knowledge base and other World of Work bundle options as well as manage their digital subscriptions.

Level 1

**Strength & interest
exploration**

powered by:



[Login](#)

Level 3

Meet A Pro experience

powered by:



[Login](#)

**Digital design and World
of Work implementation
partner providing
services throughout K-16**

provided by:



[Login](#)

DEHESA SCHOOL DISTRICT

To: Members of the Board and
Supt. Nancy Hauer

From: Anna Buxbaum

Subject: 2017-18 Audit Report

Meeting Date: January 15, 2019

- Action
- First Reading
- Information
- Presentation
- Discussion
- Public Hearing
- Roll Call Vote Required

Background:

In accordance with Education Code 41020, school districts and other local education agencies (LEA's) are required to contract with an independent accounting firm each year to conduct a thorough financial audit. The district's annual financial audit provides an objective review of how the districted operated during the prior fiscal year.

Report:

The financial audit for the 2017-18 school year was conducted by Wilkinson Hadley King & Co. LLP. Attached is the full audit report for the fiscal year ending June 30, 2018. This year's audit report does not identify any findings.

Financial Impact:

N/A

Student Impact:

N/A

Recommendation:

Administration recommends acceptance of the 2017-18 Audit Report.

Agenda Item #: VII.C.4

**DEHESA SCHOOL DISTRICT
COUNTY OF SAN DIEGO
EL CAJON, CALIFORNIA**

AUDIT REPORT

JUNE 30, 2018

Introductory Section

Dehesa School District
 Audit Report
 For The Year Ended June 30, 2018

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Dehesa School District
 Audit Report
 For The Year Ended June 30, 2018

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Financial Section



P. Robert Wilkinson, CPA
Brian K. Hadley, CPA
Mark Bomediano, CPA

Aubrey W. Mann, CPA
Kevin A. Sproul, CPA

Independent Auditor's Report

To the Board of Trustees
Dehesa School District
El Cajon, California

Report on the Financial Statements

We have audited the accompanying financial statements of the governmental activities, each major fund, and the aggregate remaining fund information of the Dehesa School District ("the District") as of and for the year ended June 30, 2018, and the related notes to the financial statements, which collectively comprise the District's basic financial statements as listed in the table of contents.

Management's Responsibility for the Financial Statements

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

Auditor's Responsibility

Our responsibility is to express opinions on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the District's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Opinions

In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities, each major fund, and the aggregate remaining fund information of Dehesa School District as of June 30, 2018, and the respective changes in financial position, for the year then ended in accordance with accounting principles generally accepted in the United States of America.

El Cajon Office
218 W. Douglas Avenue El Cajon, CA 92020
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2001 Addison Street, 3rd Floor, Berkeley, CA 94704
Tel. (510) 679-6900 Fax (510) 679-6901

Emphasis of Matter

Change in Accounting Principle

As described in Note A to the financial statements, in 2018, Dehesa School District adopted new accounting guidance, Governmental Accounting Standards Board Statement No. 75, *Accounting and Financial Reporting for Postemployment Benefits Other than Pensions*. Our opinion is not modified with respect to this matter.

Other Matters

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that the Management's Discussion and Analysis, and budgetary comparison information and schedule of the District's proportionate share of the net pension liability and schedule of District pension contributions, and schedule of the District's proportionate share of the net OPEB liability and schedule of District OPEB contributions identified as Required Supplementary Information in the table of contents be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Other Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the Dehesa School District's basic financial statements. The combining financial statements are presented for purposes of additional analysis and are not required parts of the basic financial statements. The accompanying other supplementary information is presented for purposes of additional analysis as required by the State's audit guide, *2017-18 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting* prescribed in Title 5, *California Code of Regulations*, Section 19810 and is also not a required part of the basic financial statements.

The combining financial statements and other supplementary information are the responsibility of management and were derived from and relate directly to the underlying accounting and other records used to prepare the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the combining financial statements and other supplementary information are fairly stated in all material respects in relation to the basic financial statements as a whole.

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated December 17, 2018 on our consideration of Dehesa School District's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the District's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Dehesa School District's internal control over financial reporting and compliance.

William A. Kelley King & Co., LLP

El Cajon, CA
December 17, 2018

DEHESA SCHOOL DISTRICT
MANAGEMENT DISCUSSION AND ANALYSIS
JUNE 30, 2018
(Unaudited)

The discussion and analysis of Dehesa School District's financial performance provides an overall review of the District's financial activities for the fiscal year ended June 30, 2018. The intent of this discussion and analysis is to look at the District's financial performance as a whole. To provide a complete understanding of the District's financial performance, please read it in conjunction with the Independent Auditor's Report, the District's financial statements and notes to the basic financial statements.

The Management's Discussion and Analysis (MD & A) is an element of the reporting model adopted by the Governmental Accounting Standards Board (GASB) in their Statement No. 34 Basic Financial Statements – and Management's Discussion and Analysis – for State and Local Governments issued June 1999. Certain comparative information is required to be presented in the MD & A.

FINANCIAL HIGHLIGHTS

- The decrease in Local Control Funding Formula (LCFF) sources from 2016-17 to 2017-18 was \$243,926.
- The general fund expenditures decreased by \$61,937 or 1.5% over the previous year amount.
- General Fund revenues and other sources exceeded expenditures and other uses by \$2.2 million.
- The General Fund ended the fiscal year with 55.4% reserves in unrestricted fund balance.

Overview of the Financial Statements

This annual report consists of the following parts – management's discussion and analysis (this section), the basic financial statements, required supplementary information, other supplementary information, and findings and recommendations. These statements are organized so the reader can understand the Dehesa School District as a financial whole, an entire operating entity. The statements then proceed to provide an increasingly detailed look at specific financial activities.

The Basic Financial Statements

The first two statements are district-wide financial statements, the Statement of Net Position and the Statement of Activities. These statements provide information about the activities of the whole School District, presenting both an aggregate view of the District's finances and a longer-term view of those finances. Fund financial statements provide the next level of detail. For governmental funds, these statements tell how services were financed in the short-term as well as what remains for future spending. The fund financial statements also look at the School District's more significant funds with all other non-major funds presented in total in one column.

The financial statements also include notes that explain some of the supplementary information in the statements and provide more detailed data. The statements are followed by a section of required supplementary information that further explains and supports the financial statements. A comparison of the District's general fund budget is included.

Reporting the School District as a Whole

Statement of Net Position and the Statement of Activities

These two statements provide information about the District as a whole using methods similar to those used by private-sector companies. The Statement of Net Position includes all the District's assets, deferred outflows of resources, liabilities, and deferred inflows of resources using the accrual basis of accounting. This basis of accounting takes in account all the current year's revenues and expenses regardless of when cash is received or paid. These statements report information on the district as a whole and its activities in a way that helps answer the question, "How did we do financially during 2017-2018?"

The change in net position is important because it tells the reader that, for the School District as a whole, the financial position of the School District has improved or diminished. The causes of this change may be the result of many factors, some financial, some not. Over time, the increases or decreases in the District's net position, as reported in the Statement of Activities, are one indicator of whether its financial health is improving or deteriorating. The relationship between revenues and expenses indicates the District's operating results. However, the District's goal is to provide services to our students, not to generate profits as commercial entities. One must consider many non-financial factors, such as the quality of education provided to assess the overall health of the District.

- Increases or decreases in the net position of the District over time are indications of whether its financial position is improving or deteriorating, respectively.
- Additional non-financial factors such as condition of school buildings and other facilities, and changes to the property tax base of the District need to be considered in assessing the overall health of the District.

Reporting the School District's Most Significant Funds

Fund Financial Statements

The fund financial statements provide more detailed information about the District's most significant funds – not the District as a whole. Funds are accounting devices the District uses to keep track of specific sources of funding and spending on particular programs. Some funds are required to be established by State law. However, the District establishes other funds to control and manage money for specific purposes.

Governmental Funds

Most of the School District's activities are reported in governmental funds. The major governmental fund of the District is the General Fund. Governmental funds focus on how money flows into and out of the funds and the balances that remain at the end of the year. They are reported using an accounting method called modified accrual accounting, which measures cash and all other financial assets that can readily be converted to cash. The governmental fund statements provide a detailed short-term view of the District's operations and services that help determine whether there are more or fewer financial resources that can be spent in the near future to finance the District's programs.

Fiduciary Funds

The District is the trustee, or fiduciary, for the student activities funds. All of the District's fiduciary activities are reported in separate Statements of Fiduciary Net Position. We exclude these activities from the District's other financial statements because the District cannot use these assets to finance its operations. The District is responsible for ensuring that the assets reported in these funds are used for their intended purposes.

FINANCIAL ANALYSIS OF THE GOVERNMENT WIDE STATEMENTS

The School District as a Whole

The District's net position was \$3.6 million at June 30, 2018. Of this amount, unrestricted net position was \$0.71 million, net investment in capital assets was \$0.75 million, and restricted net position was \$2.14 million. A Comparative analysis of government-wide statement of net position is presented in Table 1.

The District's net position increased \$2.25 million this fiscal year (See Table 2). The District's expenses for instructional and pupil services represented 77% of total expenses. The administrative activities of the District accounted for just 10% of total costs. The remaining 13% was spent in the areas of plant services and other expenses. (See Figure 2)

(Table 1)
Comparative Statement of Net Position

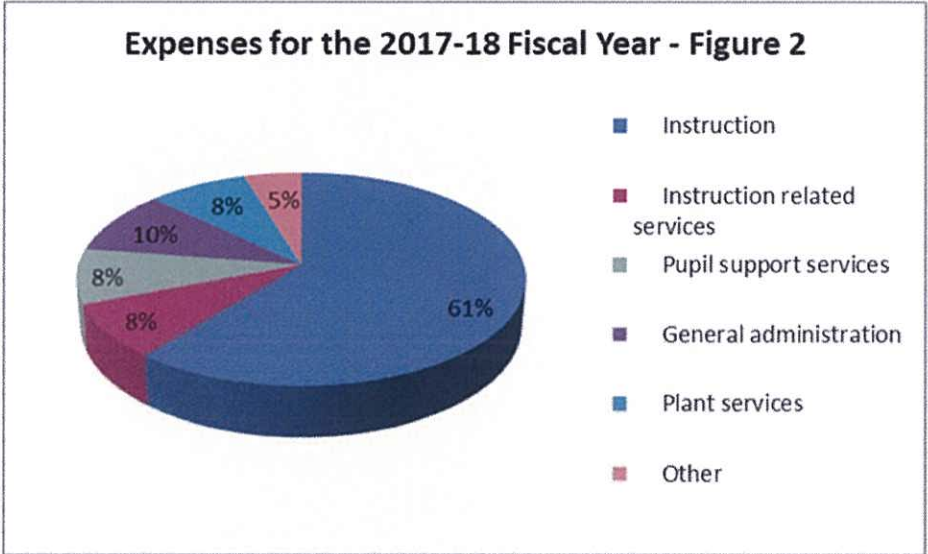
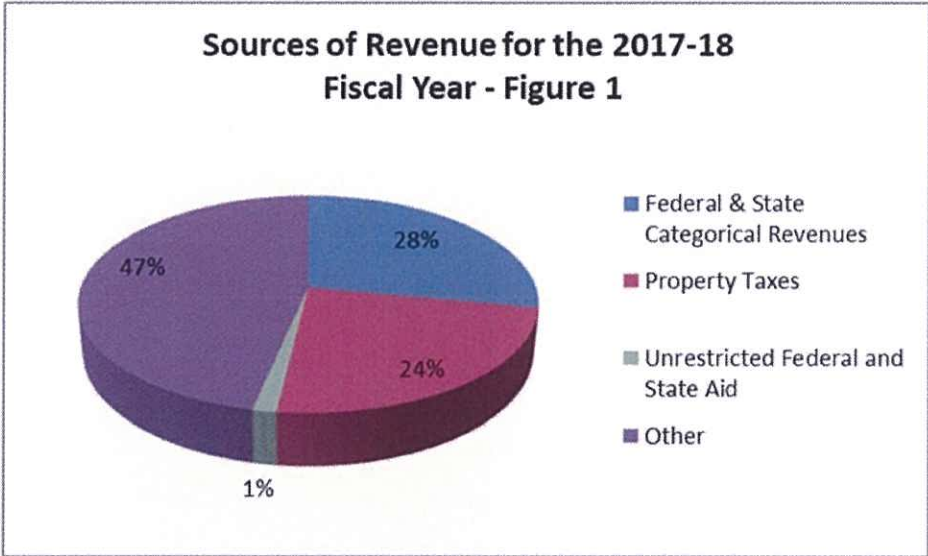
	<u>Governmental Activities</u>	
	<u>June 30, 2018</u>	<u>June 30, 2017</u>
Assets		
Cash	\$ 9,376,499	\$ 2,476,875
Accounts receivable	2,936,963	1,042,968
Stores inventory	0	0
Capital assets, net	5,763,503	5,724,007
Total Assets	<u>\$ 18,076,965</u>	<u>\$ 9,243,850</u>
Deferred Outflows of Resources		
Deferred outflows of resources - OPEB	\$ 16,148	\$ 0
Deferred outflows of resources - pensions	773,269	388,655
Total Deferred Outflows of Resources	<u>\$ 789,417</u>	<u>\$ 388,655</u>
Liabilities		
Accounts payable and other current liabilities	7,136,587	635,060
Unearned revenue	21,588	258
Long-term liabilities	7,480,623	7,414,822
Total Liabilities	<u>14,638,798</u>	<u>8,050,140</u>
Deferred Inflows of Resources		
Deferred inflows of resources - pensions	\$ 559,911	\$ 277,241
Deferred inflows of resources - OPEB	771	0
Total Deferred Inflows of Resources	<u>\$ 560,682</u>	<u>\$ 277,241</u>
Net Assets		
Net investment in capital assets	750,421	722,379
Restricted	2,202,060	1,553,381
Unrestricted	714,421	(970,636)
Total Net Position	<u>\$ 3,666,902</u>	<u>\$ 1,305,124</u>

(Table 2)
Comparative Statement of Change in Net Position

	<u>Governmental Activities</u>	
	<u>June 30, 2018</u>	<u>June 30, 2017</u>
Revenues		
Program revenues		
Charges for services	\$ 10,391	\$ 20,078
Operating and capital grants	1,905,095	1,628,724
General revenues		
Taxes levied for general purposes	1,393,010	1,094,425
Taxes levied for debt service	235,256	186,275
Taxes levied for other specific purposes	0	0
Federal and state aid not restricted to specific purposes	98,159	661,939
Interest and investment earnings	62,173	24,706
Miscellaneous	<u>3,106,802</u>	<u>1,738,009</u>
Total Revenues	<u>6,810,886</u>	<u>5,354,156</u>
Expenses		
Instruction	2,770,458	1,538,430
Instruction related services	375,862	416,606
Pupil support services	379,262	1,717,966
General administration	436,419	401,036
Plant services	376,440	294,236
Other	<u>214,817</u>	<u>214,377</u>
Total Expenses	<u>4,553,258</u>	<u>4,582,651</u>
Increase (Decrease) in Net Position	2,257,628	771,505
Net Position - Beginning Balance	1,305,124	533,619
Adjustment for implementation of GASB 75	104,150	0
Net Position - Ending Balance	<u>\$ 3,666,902</u>	<u>\$ 1,305,124</u>

GOVERNMENTAL ACTIVITIES

As reported in the Statement of Activities, the cost of all of the District's governmental activities this year was \$4.5 million. The amount that our local taxpayers financed for these activities through property taxes was \$1.6 million (See Figure 1).



FINANCIAL ANALYSIS OF THE FUND STATEMENTS

The fund financial statements focus on individual parts of the District’s operations in more detail than the government-wide statements. The District’s individual fund statements provide information on inflows and outflows and balances of spendable resources. The District’s Governmental Funds reported a combined fund balance of \$5.2 million, an increase of \$2.3 million from the previous fiscal year’s combined ending balance of \$2.9 million.

General Fund Budgetary Highlights

Over the course of the year, the District revised the annual operating budget regularly. The significant budget adjustments fell into the following categories:

- Budget revisions to the adopted budget required after approval of the State budget.
- Budget revisions to update revenues to actual enrollment information and to update expenditures for staffing adjustments related to actual enrollments.
- Other budget revisions are routine in nature, including adjustments to categorical revenues and expenditures based on final awards, and adjustments between expenditure categories for school and department budgets.

The final revised budget for the General Fund reflected a net increase to the ending balance of \$0.5 million.

The District ended the year with a \$1.8 million increase to the general fund ending balance. The State recommends available reserves of 3% of District expenditures.

CAPITAL ASSET AND DEBT ADMINISTRATION

Capital Assets

The District has a broad range of capital assets, including school buildings, administrative buildings, site improvements, vehicles, and equipment. Table 3 demonstrates a comparative Schedule of Capital Assets.

(Table 3)
Comparative Schedule of Capital Assets
June 30, 2018 and 2017

	<u>2018</u>	<u>2017</u>	<u>Net \$ Change</u>	<u>Net % Change</u>
Land	\$ 3,000	\$ 3,000	\$ 0	0.0%
Land Improvements	304,956	251,457	53,499	21.3%
Buildings & Improvements	7,318,069	7,211,079	106,990	1.5%
Equipment	907,851	772,221	135,630	17.6%
Less Accumulated Depreciation for				
Land Improvements	(35,839)	(21,978)	(13,861)	63.1%
Buildings & Improvements	(1,982,306)	(1,787,589)	(194,717)	10.9%
Equipment	(752,228)	(704,183)	(48,045)	6.8%
Total	<u>\$ 5,763,503</u>	<u>\$ 5,724,007</u>	<u>\$ 39,496</u>	<u>0.7%</u>

Long-Term Debt

At June 30, 2018 the District had \$17.9 million in long-term debt outstanding. Table 4 shows a comparative schedule of long-term debt items.

(Table 4)
Comparative Schedule of Long-Term Debt
June 30, 2018 and 2017

	<u>2018</u>	<u>2017</u>	<u>Net \$ Change</u>	<u>Net % Change</u>
General Obligation Bonds	\$ 5,013,082	\$ 5,001,627	\$ 11,455	0.2%
Total Long-Term Debt	<u>\$ 5,013,082</u>	<u>\$ 5,001,627</u>	<u>\$ 11,455</u>	<u>0.2%</u>

FACTORS BEARING ON THE DISTRICT'S FUTURE

The State's economic downturns and surpluses impact the District's future dramatically. The financial well-being of the District is tied in large measure to the state funding formula which is currently not funding the District at 100%.

The latest enrollment projections indicate a downward trend for the next two school years. Student enrollment and attendance are primary factors in the computation of most funding formulae for public schools in the State of California. While ADA growth is not budgeted until realized in the fall, future growth potential is there, but attendance remains the focal point of every budget report.

Predicting the future requires management to plan carefully and prudently to provide the resources to meet student needs over the next several years. The District currently maximizes restricted funds prior to utilizing unrestricted revenues in the budget development process. In addition, personnel practices will evidence early and effective intervention in identifying appropriate personnel actions that need to occur early in future school years experiencing State economic fallout. The District has an excellent track record in meeting this challenge in what has proven to be a long cycle of lean years for education finances.

CONTACTING THE DISTRICT'S FINANCIAL MANAGEMENT

This financial report is designed to provide our citizens, taxpayers, parents, investors, and creditors with a general overview of the District's finances and to show the District's accountability for the money it receives. If you have questions about this report or need additional financial information, please contact the business office, at Dehesa School District, 4612 Dehesa Rd, El Cajon, California 92019.

Basic Financial Statements

DEHESA SCHOOL DISTRICT
STATEMENT OF NET POSITION
JUNE 30, 2018

	<u>Governmental Activities</u>
ASSETS:	
Cash	\$ 9,376,499
Accounts Receivable	2,936,963
Capital Assets:	
Land	3,000
Land Improvements	304,956
Buildings	7,318,069
Equipment	907,851
Less Accumulated Depreciation	<u>(2,770,373)</u>
Total Assets	<u>18,076,965</u>
DEFERRED OUTFLOWS OF RESOURCES	789,417
LIABILITIES:	
Accounts Payable	7,136,587
Unearned Revenue	21,588
Long-Term Liabilities:	
Due Within One Year	72,415
Due in more Than One Year	<u>7,408,208</u>
Total Liabilities	<u>14,638,798</u>
DEFERRED INFLOWS OF RESOURCES	560,682
NET POSITION:	
Net Investment in Capital Assets	750,421
Restricted For:	
Capital Projects	277,271
Debt Service	142,400
Educational Programs	1,009,598
Other Purposes (Expendable)	770,084
Other Purposes (Nonexpendable)	2,707
Unrestricted	714,421
Total Net Position	<u>\$ 3,666,902</u>

The accompanying notes are an integral part of this statement.

DEHESA SCHOOL DISTRICT
STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2018

Functions	Expenses	Program Revenues		Net (Expense) Revenue and Changes in Net Position
		Charges for Services	Operating Grants and Contributions	
Governmental Activities:				
Instruction	\$ 2,770,458	\$ -	\$ 1,522,382	\$ -
Instruction-Related Services:				
Instructional Supervision and Administration	46,954	-	41,726	-
Instructional Library, Media and Technology	72,862	-	9,038	-
School Site Administration	256,046	-	29,847	-
Pupil Services:				
Home-to-School Transportation	183,640	-	-	-
Food Services	90,219	10,391	45,190	-
All Other Pupil Services	105,403	-	44,482	-
General Administration:				
Centralized Data Processing	-	-	-	-
All Other General Administration	436,419	-	7,435	-
Plant Services	376,440	-	204,995	-
Interest on Long-Term Debt	214,817	-	-	-
Total Expenses	\$ 4,553,258	\$ 10,391	\$ 1,905,095	\$ -
General Revenues:				
Taxes and Subventions:				
Taxes Levied for General Purposes				1,393,010
Taxes Levied for Debt Service				235,256
Federal and State Aid Not Restricted to Specific Programs				98,159
Interest and Investment Earnings				62,173
Interagency Revenues				2,789,008
Miscellaneous				317,794
Total General Revenues				\$ 4,895,400
Change in Net Position				2,257,628
Net Position - Beginning - As Restated (Note P)				1,409,274
Net Position - Ending				\$ 3,666,902

The accompanying notes are an integral part of this statement.

DEHESA SCHOOL DISTRICT
BALANCE SHEET - GOVERNMENTAL FUNDS
JUNE 30, 2018

	General Fund	Other Governmental Funds	Total Governmental Funds
ASSETS:			
Cash in County Treasury	\$ 8,814,091	\$ 556,921	\$ 9,371,012
Cash on Hand and in Banks	-	2,779	2,779
Cash in Revolving Fund	2,707	-	2,707
Accounts Receivable	2,926,856	10,107	2,936,963
Due from Other Funds	29,504	12,976	42,480
Total Assets	<u>11,773,158</u>	<u>582,783</u>	<u>12,355,941</u>
LIABILITIES AND FUND BALANCE:			
Liabilities:			
Accounts Payable	\$ 7,053,363	\$ 1,823	\$ 7,055,186
Due to Other Funds	12,976	29,504	42,480
Unearned Revenue	21,588	-	21,588
Total Liabilities	<u>7,087,927</u>	<u>31,327</u>	<u>7,119,254</u>
Fund Balance:			
Nonspendable Fund Balances:			
Revolving Cash	2,707	-	2,707
Restricted Fund Balances	27,284	1,181	28,465
Assigned Fund Balances	1,770,084	550,275	2,320,359
Unassigned:			
Reserve for Economic Uncertainty	619,852	-	619,852
Other Unassigned	2,265,304	-	2,265,304
Total Fund Balance	<u>4,685,231</u>	<u>551,456</u>	<u>5,236,687</u>
Total Liabilities and Fund Balances	<u>\$ 11,773,158</u>	<u>\$ 582,783</u>	<u>\$ 12,355,941</u>

The accompanying notes are an integral part of this statement.

DEHESA SCHOOL DISTRICT
 RECONCILIATION OF THE GOVERNMENTAL FUNDS BALANCE SHEET
 TO THE STATEMENT OF NET POSITION
 JUNE 30, 2018

Total fund balances, governmental funds		\$ 5,236,687
Amounts reported for governmental activities in the statement of net position are different because:		
Capital Assets: In governmental funds, only current assets are reported. In the statement of net position, all assets are reported, including capital assets and accumulated depreciation.		
Capital assets relating to governmental activities, at historical cost:	8,533,876	
Accumulated depreciation:	<u>(2,770,373)</u>	
	Net:	5,763,503
Unmatured interest on long-term debt: In governmental funds, interest on long-term debt is not recognized until the period in which it matures and is paid. In the government-wide statement of activities, it is recognized in the period that it is incurred. The additional liability for unmatu		(81,400)
Deferred outflows and inflows of resources relating to pensions: In governmental funds, deferred outflows and inflows of resources relating to pensions are not reported because they are applicable to future periods. In the statement of net position, deferred outflows and inflows of resources relating to pensions are reported.		
	Deferred outflows of resources relating to pensions	773,269
	Deferred inflows of resources relating to pensions	(559,911)
Deferred outflows and inflows of resources related to other postemployment benefits (OPEB): In governmental funds, deferred outflows and inflows of resources related to OPEB are not reported because they are applicable to future periods. In the statement of net position, deferred outflows and inflows of resources related to OPEB are reported.		
	Deferred outflows of resources relating to OPEB	16,148
	Deferred inflows of resources relating to OPEB	(771)
Long-term liabilities: In governmental funds, only current liabilities are reported. In the statement of net position, all liabilities, including long-term liabilities, are reported. Long-term liabilities relating to governmental activities consist of:		
	General obligation bonds	5,013,082
	Net pension liability	2,299,614
	Net OPEB obligation	132,948
	Compensated absences payable	<u>34,979</u>
		<u>(7,480,623)</u>
Total net position, governmental activities		\$ <u>3,666,902</u>

The accompanying notes are an integral part of this statement.

DEHESA SCHOOL DISTRICT
STATEMENT OF REVENUES, EXPENDITURES, AND CHANGES
IN FUND BALANCES - GOVERNMENTAL FUNDS
FOR THE YEAR ENDED JUNE 30, 2018

	General Fund	Other Governmental Funds	Total Governmental Funds
Revenues:			
LCFF Sources:			
State Apportionment or State Aid	\$ 1,058,974	\$ -	\$ 1,058,974
Education Protection Account Funds	193,148	-	193,148
Local Sources	152,809	-	152,809
Federal Revenue	327,120	41,915	369,035
Other State Revenue	387,384	5,407	392,791
Other Local Revenue	4,129,954	537,542	4,667,496
Total Revenues	<u>6,249,389</u>	<u>584,864</u>	<u>6,834,253</u>
Expenditures:			
Current:			
Instruction	2,567,961	-	2,567,961
Instruction - Related Services	370,048	-	370,048
Pupil Services	200,767	145,459	346,226
General Administration	414,393	-	414,393
Plant Services	274,271	93,535	367,806
Capital Outlay	136,930	156,767	293,697
Debt Service:			
Principal	-	4,775	4,775
Interest	-	198,587	198,587
Total Expenditures	<u>3,964,370</u>	<u>599,123</u>	<u>4,563,493</u>
Excess (Deficiency) of Revenues Over (Under) Expenditures	<u>2,285,019</u>	<u>(14,259)</u>	<u>2,270,760</u>
Other Financing Sources (Uses):			
Transfers In	1,323,644	53,723	1,377,367
Transfers Out	(1,377,367)	-	(1,377,367)
Total Other Financing Sources (Uses)	<u>(53,723)</u>	<u>53,723</u>	<u>-</u>
Net Change in Fund Balance	<u>2,231,296</u>	<u>39,464</u>	<u>2,270,760</u>
Fund Balance, July 1	2,453,935	511,992	2,965,927
Fund Balance, June 30	<u>\$ 4,685,231</u>	<u>\$ 551,456</u>	<u>\$ 5,236,687</u>

The accompanying notes are an integral part of this statement.

DEHESA SCHOOL DISTRICT

RECONCILIATION OF THE STATEMENT OF REVENUES, EXPENDITURES,
AND CHANGES IN FUND BALANCES OF GOVERNMENTAL FUNDS
TO THE STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2018

Total change in fund balances, governmental funds \$ 2,270,760

Amounts reported for governmental activities in the statement of activities are different because:

Capital outlay: In governmental funds, the costs of capital assets are reported as expenditures in the period when the assets are acquired. In the statement of activities, costs of capital assets are allocated over their estimated useful lives as depreciation expense. The difference between capital outlay expenditures and depreciation expense for the period is:

Expenditures for capital outlay	296,119	
Depreciation expense	<u>(256,623)</u>	
Net:		39,496

Debt service: In governmental funds, repayments of long-term debt are reported as expenditures. In the government-wide statements, repayments of long-term debt are reported as reductions of liabilities. Expenditures for repayment of the principal portion of long-term debt were:

4,775

Unmatured interest on long-term debt: In governmental funds, interest on long-term debt is recognized in the period that it becomes due. In the government-wide statement of activities, it is recognized in the period that it is incurred. Unmatured interest owing at the end of the period, less matured interest paid during the period but owing from the prior period, was:

(28,666)

Pensions: In government funds, pension costs are recognized when employer contributions are made. In the statement of activities, pension costs are recognized on the accrual basis. This year, the difference between accrual-basis pension costs and actual employer contributions was:

(36,376)

Amortization of debt issue premium or discount or deferred gain or loss from debt refunding: In governmental funds, if debt is issued at a premium or at a discount, the premium or discount is recognized as an Other Financing Source or an Other Financing Use in the period it is incurred. In the government-wide statements, the premium or discount, plus any deferred gain or loss from debt refunding, is amortized as interest over the life of the debt. Amortization of debt issue premium or discount, or deferred gain or loss from debt refunding, for the period is:

12,437

Postemployment benefits other than pensions (OPEB): In governmental funds, OPEB costs are recognized when employer contributions are made. In the statement of activities, OPEB costs are recognized on the accrual basis. This year, the difference between OPEB costs and actual employer contributions was:

14,645

Compensated absences: In governmental funds, compensated absences are measured by the amounts paid during the period. In the statement of activities, compensated absences are measured by the amounts earned. The difference between compensated absences paid and compensated absences earned was:

(19,443)

Change in net assets of governmental activities - statement of activities \$ 2,257,628

The accompanying notes are an integral part of this statement.

DEHESA SCHOOL DISTRICT
 STATEMENT OF FIDUCIARY NET POSITION
 FIDUCIARY FUNDS
 JUNE 30, 2018

	Agency Fund
	Student Body Fund
ASSETS:	
Cash on Hand and in Banks	\$ 10,025
Total Assets	<u>10,025</u>
LIABILITIES:	
Due to Student Groups	\$ 10,025
Total Liabilities	<u>10,025</u>
NET POSITION:	
Total Net Position	<u>\$ -</u>

The accompanying notes are an integral part of this statement.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

A. Summary of Significant Accounting Policies

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

1. Reporting Entity

The District operates under a locally elected Board form of government and provides educational services as mandated by the state. A reporting entity is comprised of the primary government, component units, and other organizations that are included to ensure the financial statements are not misleading. The primary government of the District consists of all funds, departments and agencies that are not legally separate from the District. For the District, this includes general operations, food service, and student-related activities.

2. Component Units

Component units are legally separate organizations for which the District is financially accountable. Component units may also include organizations that are fiscally dependent on the District in that the District approves their budget, the issuance of their debt or the levying of their taxes. In addition, component units are other legally separate organizations for which the District is not financially accountable but the nature and significance of the organization's relationship with the District is such that exclusion would cause the District's financial statements to be misleading or incomplete. The District has no component units. Additionally, the District is not a component unit of any other reporting entity as defined by GASB Statement 14, 39 and 61.

3. Basis of Presentation. Basis of Accounting

a. Basis of Presentation

Government-wide Statements: The statement of net position and the statement of activities include the financial activities of the overall government, except for fiduciary activities. Eliminations have been made to minimize the double-counting of internal activities. Governmental activities generally are financed through taxes, intergovernmental revenues, and other nonexchange transactions.

The statement of activities presents a comparison between direct expenses and program revenues for each function of the District's governmental activities. Direct expenses are those that are specifically associated with a program or function and, therefore, are clearly identifiable to a particular function. The District does not allocate indirect expenses in the statement of activities. Program revenues include (a) fees, fines, and charges paid by the recipients of goods or services offered by the programs and (b) grants and contributions that are restricted to meeting the operational or capital requirements of a particular program. Revenues that are not classified as program revenues, including all taxes, are presented as general revenues.

Fund Financial Statements: The fund financial statements provide information about the District's funds, with separate statements presented for each fund category. The emphasis of fund financial statements is on major governmental funds, each displayed in a separate column. All remaining governmental funds are aggregated and reported as nonmajor funds.

The District reports the following major governmental funds:

General Fund. This is the District's primary operating fund. It accounts for all financial resources of the District except those required to be accounted for in another fund.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

In addition, the District reports the following fund types:

Special Revenue Funds. These funds are used to account for the proceeds of specific revenue sources that are legally restricted to expenditures for specific purposes.

Capital Projects Funds. These funds account for the acquisition and/or construction of all major governmental fixed assets.

Debt Service Funds. These funds account for the accumulation of resources for, and the payment of general long-term debt principal, interest, and related costs.

Agency Funds: These funds are used to report student activity funds and other resources held in a purely custodial capacity (assets equal liabilities). Agency funds typically involve only the receipt, temporary investment, and remittance of fiduciary resources to individuals, private organizations, or other governments.

Fiduciary funds are reported in the fiduciary fund financial statements. However, because their assets are held in a trustee or agent capacity and are therefore not available to support District programs, these funds are not included in the government-wide statements.

b. Measurement Focus, Basis of Accounting

Government-wide and Fiduciary Fund Financial Statements: These financial statements are reported using the economic resources measurement focus. They are reported using the accrual basis of accounting. Revenues are recorded when earned and expenses are recorded at the time liabilities are incurred, regardless of when the related cash flows take place. Nonexchange transactions, in which the District gives (or receives) value without directly receiving (or giving) equal value in exchange, include property taxes, grants, entitlements, and donations. On an accrual basis, revenue from property taxes is recognized in the fiscal year for which the taxes are levied. Revenue from grants, entitlements, and donations is recognized in the fiscal year in which all eligibility requirements have been satisfied.

Governmental Fund Financial Statements: Governmental funds are reported using the current financial resources measurement focus and the modified accrual basis of accounting. Under this method, revenues are recognized when measurable and available. The District considers all revenues reported in the governmental funds to be available if the revenues are collected within sixty days after year-end. Revenues from local sources consist primarily of property taxes. Property tax revenues and revenues received from the State are recognized under the susceptible-to-accrual concept. Miscellaneous revenues are recorded as revenue when received in cash because they are generally not measurable until actually received. Investment earnings are recorded as earned, since they are both measurable and available. Expenditures are recorded when the related fund liability is incurred, except for principal and interest on general long-term debt, claims and judgments, and compensated absences, which are recognized as expenditures to the extent they have matured. General capital asset acquisitions are reported as expenditures in governmental funds. Proceeds of general long-term debt and acquisitions under capital leases are reported as other financing sources.

When the District incurs an expenditure or expense for which both restricted and unrestricted resources may be used, it is the District's policy to use restricted resources first, then unrestricted resources.

4. Encumbrances

Encumbrance accounting is used in all budgeted funds to reserve portions of applicable appropriations for which commitments have been made. Encumbrances are recorded for purchase orders, contracts, and other commitments when they are written. Encumbrances are liquidated when the commitments are paid. All encumbrances are liquidated as of June 30.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

5. Budgets and Budgetary Accounting

Annual budgets are adopted on a basis consistent with generally accepted accounting principles for all governmental funds. By state law, the District's governing board must adopt a final budget no later than July 1. A public hearing must be conducted to receive comments prior to adoption. The District's governing board satisfied these requirements.

These budgets are revised by the District's governing board and district superintendent during the year to give consideration to unanticipated income and expenditures.

Formal budgetary integration was used as a management control device during the year for all budgeted funds. The District employs budget control by minor object and by individual appropriation accounts. Expenditures cannot legally exceed appropriations by major object code.

6. Revenues and Expenses

a. Revenues - Exchange and Non-Exchange

Revenue resulting from exchange transactions, in which each party gives and receives essentially equal value, is recorded on the accrual basis when the exchange takes place. On a modified accrual basis, revenue is recorded in the fiscal year in which the resources are measurable and become available. Available means that the resources will be collected within the current year or expected to be collected soon enough thereafter, to be used to pay liabilities of the current fiscal year. Generally, available is defined as collectible within 60 days. However, to achieve comparability of reporting among California districts and so as to not distort normal revenue patterns, with specific respect to reimbursement grants and corrections to State-aid apportionments, the California Department of Education has defined available for districts as collectible within one year. The following revenue sources are considered to be both measurable and available at fiscal year-end: State apportionments, property tax revenue, interest, certain grants, and other local sources.

Non-exchange transactions are transactions in which the District receives value without directly giving equal value in return, including property taxes, certain grants, entitlements, and donations. Revenue from property taxes is recognized in the fiscal year in which the taxes are received. Revenue from certain grants, entitlements, and donations is recognized in the fiscal year in which all eligibility requirements have been satisfied. Eligibility requirements include time and purpose restrictions. On a modified accrual basis, revenue from non-exchange transactions must also be available before it can be recognized.

c. Expenses/Expenditures

On the accrual basis of accounting, expenses are recognized at the time they are incurred. The measurement focus of governmental fund accounting is on decreases in net financial resources (expenditures) rather than expenses. Expenditures are generally recognized in the accounting period in which the related fund liability is incurred, if measurable, and typically paid within 90 days. Principal and interest on long-term obligations, which has not matured, are recognized when paid in the governmental funds as expenditures. Allocations of costs, such as depreciation and amortization, are not recognized in the governmental funds but are recognized in the government-wide financial statements.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

7. Assets, Liabilities, and Equity

a. Deposits and Investments

Cash balances held in banks and in revolving funds are insured to \$250,000 by the Federal Depository Insurance Corporation. All cash held by the financial institutions is fully insured or collateralized.

In accordance with Education Code Section 41001, the District maintains substantially all its cash in the San Diego County Treasury. The county pools these funds with those of other districts in the county and invests the cash. These pooled funds are carried at cost, which approximates market value. Interest earned is deposited quarterly into participating funds, except for the Tax Override Funds, in which interest earned is credited to the general fund. Any investment losses are proportionately shared by all funds in the pool

The county is authorized to deposit cash and invest excess funds by California Government Code Section 53648 et seq. The funds maintained by the county are either secured by federal depository insurance or are collateralized.

Information regarding the amount of dollars invested in derivatives with San Diego County Treasury was not available.

b. Stores Inventories and Prepaid Expenditures

Inventories are recorded using the purchases method in that the cost is recorded as an expenditure at the time individual inventory items are purchased. Inventories are valued at average cost and consist of expendable supplies held for consumption. Reported inventories are equally offset by a fund balance reserve, which indicates that these amounts are not "available for appropriation and expenditure" even though they are a component of net current assets.

The District has the option of reporting an expenditure in governmental funds for prepaid items either when purchased or during the benefiting period. The District has chosen to report the expenditure when incurred

c. Capital Assets

Purchased or constructed capital assets are reported at cost or estimated historical cost. Donated fixed assets are recorded at their estimated fair value at the date of the donation. The cost of normal maintenance and repairs that do not add to the value of the asset or materially extend assets' lives are not capitalized. A capitalization threshold of \$5,000 is used.

Capital assets are being depreciated using the straight-line method over the following estimated useful lives:

<u>Asset Class</u>	<u>Estimated Useful Lives</u>
Buildings	25-50
Building Improvements	10-20
Vehicles	5-7
Office Equipment	3-15
Computer Equipment	5-15

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

d. Compensated Absences

Accumulated unpaid employee vacation benefits are recognized as liabilities of the District. The current portion of the liabilities is recognized in the general fund at year end.

Accumulated sick leave benefits are not recognized as liabilities of the District. The District's policy is to record sick leave as an operating expense in the period taken since such benefits do not vest nor is payment probable; however, unused sick leave is added to the creditable service period for calculation of retirement benefits when the employee retires.

e. Unearned Revenue

Unearned revenue arises when potential revenue does not meet both the "measurable" and "available" criteria for recognition in the current period or when resources are received by the District prior to the incurrence of qualifying expenditures. In subsequent periods, when both revenue recognition criteria are met, or when the District has a legal claim to the resources, the liability for unearned revenue is removed from the balance sheet and revenue is recognized.

f. Interfund Activity

Interfund activity results from loans, services provided, reimbursements or transfers between funds. Loans are reported as interfund receivables and payables as appropriate and are subject to elimination upon consolidation. Services provided, deemed to be at market or near market rates, are treated as revenues and expenditures or expenses. Reimbursements occur when one fund incurs a cost, charges the appropriate benefiting fund and reduces its related cost as a reimbursement. All other interfund transactions are treated as transfers. Transfers In and Transfers Out are netted and presented as a single "Transfers" line on the government-wide statement of activities. Similarly, interfund receivables and payables are netted and presented as a single "Internal Balances" line of the government-wide statement of net position.

g. Property Taxes

Secured property taxes attach as an enforceable lien on property as of March 1. Taxes are payable in two installments on November 15 and March 15. Unsecured property taxes are payable in one installment on or before August 31. The County of San Diego bills and collects the taxes for the District.

h. Fund Balances - Governmental Funds

Fund balances of the governmental funds are classified as follows:

Nonspendable Fund Balance - represents amounts that cannot be spent because they are either not in spendable form (such as inventory or prepaid insurance) or legally required to remain intact (such as notes receivable or principal of a permanent fund).

Restricted Fund Balance - represents amounts that are constrained by external parties, constitutional provisions or enabling legislation.

Committed Fund Balance - represents amounts that can only be used for a specific purpose because of a formal action by the District's governing board. Committed amounts cannot be used for any other purpose unless the governing board removes those constraints by taking the same type of formal action. Committed fund balance amounts may be used for other purposes with appropriate due process by the governing board. Commitments are typically done through adoption and amendment of the budget. Committed fund balance amounts differ from restricted balances in that the constraints on their use do not come from outside parties, constitutional provisions, or enabling legislation.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

Assigned Fund Balance - represents amounts which the District intends to use for a specific purpose, but that do not meet the criteria to be classified as restricted or committed. Intent may be stipulated by the governing board or by an official or body to which the governing board delegates the authority. Specific amounts that are not restricted or committed in a special revenue, capital projects, debt service or permanent fund are assigned for purposes in accordance with the nature of their fund type or the fund's primary purpose. Assignments within the general fund conveys that the intended use of those amounts is for a specific purpose that is narrower than the general purposes of the District itself.

Unassigned Fund Balance - represents amounts which are unconstrained in that they may be spent for any purpose. Only the general fund reports a positive unassigned fund balance. Other governmental funds might report a negative balance in this classification because of overspending for specific purposes for which amounts had been restricted, committed or assigned.

When an expenditure is incurred for a purpose for which both restricted and unrestricted fund balance is available, the District considers restricted funds to have been spent first. When an expenditure is incurred for which committed, assigned, or unassigned fund balances are available, the District considers amounts to have been spent first out of committed funds, then assigned funds, and finally unassigned funds.

i. Minimum Fund Balance

The District maintains a minimum reserve of 5% of general fund expenditures including other financing uses within the general fund. This reserve may be increased from time to time in order to address specific anticipated shortfalls. If necessary, The Special Reserve Fund for Other Than Capital Outlay may also be used to meet the minimum state required reserve level. The minimum reserve shall apply towards the established minimum Reserve for Economic Uncertainties or an amount that that meets or exceeds the requirements by law. The District is committed to maintaining a prudent level of financial resources to protect against the need to reduce service levels because of temporary revenue shortfalls or unpredicted expenditures.

Because amounts in the nonspendable, restricted, committed, and assigned categories are subject to varying constraints in use, the Reserve for Economic Uncertainties consists of balances that are otherwise unassigned.

8. Deferred Inflows and Deferred Outflows of Resources

Deferred outflows of resources is a consumption of net position that is applicable to a future reporting period. Deferred inflows of resources is an acquisition of net position that is applicable to a future reporting period. Deferred outflows of resources and deferred inflows of resources are recorded in accordance with GASB Statement numbers 63 and 65.

9. GASB 54 Fund Presentation

Consistent with fund reporting requirements established by GASB Statement No. 54, Fund 17 (Special Reserve Fund for Other Than Capital Outlay) and Fund 20 (Special Reserve Fund for Postemployment Benefits) are merged with the General Fund for purposes of presentation in the audit report.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

10. Pensions

For purposes of measuring the net pension liability, deferred outflows of resources and deferred inflows of resources related to pensions, pension expense, information about the fiduciary net position of the CalPERS Schools Pool Cost-Sharing Multiple-Employer Plan (CalPERS Plan) and CalSTRS Schools Pool Cost-Sharing Multiple Employer Plan (CalSTRS Plan) and additions to/deductions from the CalPERS Plan and CalSTRS Plan's fiduciary net positions have been determined on the same basis as they are reported by the CalPERS Financial Office and CalSTRS Financial Office. For this purpose, benefit payments (including refunds of employee contributions) are recognized when currently due and payable in accordance with the benefit terms. Investments are reported at fair value.

GASB 68 requires that the reported results must pertain to liability and asset information within certain defined time frames. For this report, the following time frames are used:

Valuation Date (VD)	June 30, 2016
Measurement Date (MD)	June 30, 2017
Measurement Period (MP)	July 1, 2016 to June 30, 2017

11. Use of Estimates

The preparation of financial statements in conformity with GAAP requires the use of management's estimates. Actual results could differ from those estimates.

12. Fair Value Measurements

The District categorizes its fair value measurements within the fair value hierarchy established by generally accepted accounting principles as defined by Governmental Accounting Standards Board (GASB) Statement No. 72. The hierarchy is based on the valuation inputs used to measure the fair value of the asset. The hierarchy is detailed as follows:

Level 1 Inputs:	Quoted prices (unadjusted) in active markets for identical assets or liabilities that a government can access at the measurement date.
Level 2 Inputs:	Inputs other than quoted prices included within Level 1 that are observable for an asset or liability, either directly or indirectly.
Level 3 Inputs:	Unobservable inputs for an asset or liability.

For the current fiscal year the District did not have any recurring or nonrecurring fair value measurements.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

13. Change in Accounting Policies

The District has adopted accounting policies compliant with new pronouncements issued by the Government Accounting Standards Board (GASB) that are effective for the fiscal year ended June 30, 2018. Those newly implemented pronouncements are as follows:

GASB 75 - Accounting and Financial Reporting for Postemployment Benefits Other than Pensions

The primary objective of this statement is to improve accounting and financial reporting by state and local governments for postemployment benefits other than pensions (OPEB). This statement replaces the requirements of GASB 45 and GASB 57. This statement establishes standards for recognizing and measuring OPEB liability, deferred outflows of resources, deferred inflows of resources, and OPEB expense. This statement also identifies the methods and assumptions that are required to be used to project benefit payments, discount projected benefit payments to their actuarial present value, and attribute that present value to periods of employee service for defined benefit OPEB.

The District provides a defined benefit OPEB plan that is not administered through a trust, but meets the criteria specified in GASB 75. As a result, the District has adjusted measurement of OPEB liability, OPEB expense, and related deferred outflows and inflows of resources in compliance with GASB 75. The change in accounting policies resulted in an adjustment to beginning net position in order to accurately reflect current period transactions. Additional note disclosures regarding OPEB liability, OPEB expense, and related deferred inflows and outflows of resources are located in Note O. Additional note disclosures regarding the adjustment to beginning net position resulting from this change in accounting policy are located in Note P.

GASB 81 - Irrevocable Split-Interest Agreements

The primary objective of this statement is to improve accounting and financial reporting for irrevocable split-interest agreements by providing recognition and measurement guidance for situations in which a government is a beneficiary of the agreement. This statement requires that a government receiving resources pursuant to an irrevocable split-interest agreement recognize assets, liabilities, and deferred inflows of resources at the inception of the agreement. This statement also requires that a government recognize assets representing its beneficial interests in irrevocable split-interest agreements that are administered by a third party, if the government controls the present service capacity of the beneficial interests. In addition, this statement requires that a government recognize revenue when the resources become applicable to the reporting period.

The District does not receive resources pursuant to an irrevocable split-interest agreement, nor does the District have any beneficial interests in irrevocable split interest agreements as of June 30, 2018. The District has adopted the accounting policies in the event that the District obtains a beneficial interest in a future split-interest agreement. There have been no adjustments made to the financial statements or note disclosures as a result of adoption of the accounting policies pursuant to GASB 81.

GASB 85 - Omnibus 2017

The primary objective of this statement is to address practice issues that were identified during implementation and application of certain GASB statements. This statement addresses a variety of topics including issues related to blending component units, goodwill, fair value measurement and application, and postemployment benefits (pensions and OPEB). The statement was issued as a clarifying measure to previously issued statements

The implementation of this statement resulted in a change in how the District recognizes on-behalf payments for the special funding situation for CalSTRS pension. The results of implementing these accounting policies did not have a material effect on the financial statements and did not affect previous periods.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

GASB 86 - Certain Debt Extinguishment Issues

The primary objective of this statement is to improve consistency in accounting and financial reporting for in-substance defeasance of debt by providing guidance for transactions in which cash and other monetary assets acquired with only existing resources, other than proceeds of refunding debt, are placed in an irrevocable trust for the sole purpose of extinguishing debt. This statement also improves accounting and financial statements for debt that is defeased in substance.

The District does not have any in-substance defeasance of debt as of June 30, 2018. The District has adopted the accounting policies in the event that the District extinguishes debt through use of a legal extinguishment or through an in-substance defeasance in a future period. There have been no adjustments made to the financial statements or note disclosures as a result of adoption of the accounting policies pursuant to GASB 86.

B. Compliance and Accountability

1. Finance-Related Legal and Contractual Provisions

In accordance with GASB Statement No. 38, "Certain Financial Statement Note Disclosures," violations of finance-related legal and contractual provisions, if any, are reported below, along with actions taken to address such violations.

<u>Violation</u>	<u>Action Taken</u>
None reported	Not applicable

2. Deficit Fund Balance or Fund Net Position of Individual Funds

Following are funds having deficit fund balances or fund net position at year end, if any, along with remarks which address such deficits:

<u>Fund Name</u>	<u>Deficit Amount</u>	<u>Remarks</u>
None reported	Not applicable	Not applicable

C. Cash and Investments

1. Cash in County Treasury:

In accordance with Education Code Section 41001, the District maintains substantially all of its cash in the San Diego County Treasury as part of the common investment pool (\$9,371,012 as of June 30, 2018). The fair value of the District's portion of this pool as of that date, as provided by the pool sponsor, was \$9,371,012. Assumptions made in determining the fair value of the pooled investment portfolios are available from the County Treasurer.

The District is considered to be an involuntary participant in an external investment pool as the District is required to deposit all receipts and collections of monies with their County Treasurer (Education Code Section 41001). The fair value of the District's investments in the pool is reported in the accounting financial statements as amounts based upon the District's pro-rata share of the fair value provided by the County Treasurer for the entire portfolio (in relation to the amortized cost of the portfolio). The balance available for withdrawal is based on the accounting records maintained by the County Treasurer, which is recorded on the amortized cost basis.

The San Diego County Treasury is not registered with the Securities and Exchange Commission (SEC) as an investment company; however, the County Treasury acts in accordance with investment policies monitored by a Treasury Oversight Committee consisting of members appointed by participants in the investment pool and up to five members of the public having expertise, or an academic background in, public finance. In addition, the County Treasury is audited annually by an independent auditor.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

2. Cash on Hand, in Banks, and in Revolving Fund

Cash balances on hand and in banks (\$12,804 as of June 30, 2018) and in the revolving fund (\$2,707) are insured up to \$250,000 by the Federal Depository Insurance Corporation. All cash held by the financial institution is fully insured or collateralized.

3. Investments Authorized by the California Government Code and the District's Investment Policy

The table below identifies the investment types that are authorized for the District by the California Government Code (or the District's investment policy, where more restrictive). The table also identifies certain provisions of the California Government Code (or the District's investment policy where more restrictive) that address interest rate risk, credit risk, and concentration of credit risk. This table does not address investments of debt proceeds held by bond trustee that are governed by the provisions of debt agreements of the District, rather than the general provisions of the California Government Code or the District's investment policy.

<u>Authorized Investment Type</u>	<u>Maximum Remaining Maturity</u>	<u>Maximum Percentage of Portfolio</u>	<u>Maximum Investment in One Issuer</u>
Local Agency Bonds, Notes, Warrants	5 Years	None	None
Registered State Bonds, Notes, Warrants	5 Years	None	None
U.S. Treasury Obligations	5 Years	None	None
U.S. Agency Securities	5 Years	None	None
Banker's Acceptance	180 Days	40%	30%
Commercial Paper	270 Days	25%	10%
Negotiable Certificates of Deposit	5 Years	30%	None
Repurchase Agreements	1 Year	None	None
Reverse Repurchase Agreements	92 Days	20% of Base	None
Medium-Term Corporate Notes	5 Years	30%	None
Mutual Funds	N/A	20%	10%
Money Market Mutual Funds	N/A	20%	10%
Mortgage Pass-Through Securities	5 Years	20%	None
County Pooled Investment Funds	N/A	None	None
Local Agency Investment Fund	N/A	None	None
Joint Powers Authority Pools	N/A	None	None

4. Analysis of Specific Deposit and Investment Risks

GASB Statement No. 40 requires a determination as to whether the District was exposed to the following specific investment risks at year end and if so, the reporting of certain related disclosures:

a. Credit Risk

Credit risk is the risk that an issuer or other counterparty to an investment will not fulfill its obligations. The county is restricted by Government Code Section 53635 pursuant to Section 53601 to invest only in time deposits, U.S. government securities, state registered warrants, notes or bonds, State Treasurer's investment pool, bankers' acceptances, commercial paper, negotiable certificates of deposit, and repurchase or reverse repurchase agreements. The ratings of securities by nationally recognized rating agencies are designed to give an indication of credit risk. At year end, the District was not exposed to credit risk

b. Custodial Credit Risk

Deposits are exposed to custodial credit risk if they are not covered by depository insurance and the deposits are uncollateralized, collateralized with securities held by the pledging financial institution, or collateralized with securities held by the pledging financial institution's trust department or agent but not in the District's name.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
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California Government Code requires that a financial institution secure deposits made by State or Local Governmental units by pledging securities in an undivided collateral pool held by a depository regulated under State law (unless so waived by the governmental unit). The market value of the pledged securities in the collateral pool must equal at least 110% of the total amount deposited by the public agency. California law also allows financial institutions to secure public deposits by pledging first trust deed mortgage notes having a value of 150% of the secured public deposits and letters of credit issued by the Federal Home Loan Bank of San Francisco having value of 105% of the secured deposits.

Investment securities are exposed to custodial credit risk if the securities are uninsured, are not registered in the name of the government, and are held by either the counterparty or the counterparty's trust department or agent but not in the District's name.

As of June 30, 2018, the District's bank balances (including revolving cash) was not exposed to custodial credit .

c. Concentration of Credit Risk

This risk is the risk of loss attributed to the magnitude of a government's investment in a single issuer.

The investment policy of the District contains no limitations on the amount that can be invested in any one issuer beyond the amount stipulated by the California Government Code. Investments in any one issuer that represent five percent or more of the total investments are either an external investment pool and are therefore exempt. As such, the District was not exposed to concentration of credit risk.

d. Interest Rate Risk

This is the risk that changes in interest rates will adversely affect the fair value of an investment. Generally, the longer the maturity of an investment, the greater the sensitivity of its fair value to changes in market interest rates. The District manages its exposure to interest rate risk by investing in the county pool.

e. Foreign Currency Risk

This is the risk that exchange rates will adversely affect the fair value of an investment. At year end, the District was not exposed to foreign currency risk.

6. Investment Accounting Policy

The District is required by GASB Statement No. 31 to disclose its policy for determining which investments, if any, are reported at amortized cost. The District's general policy is to report money market investments and short-term participating interest-earning investment contracts at amortized cost and to report nonparticipating interest-earning investment contracts using a cost-based measure. However, if the fair value of an investment is significantly affected by the impairment of the credit standing of the issuer or by other factors, it is reported at fair value. All other investments are reported at fair value unless a legal contract exists which guarantees a higher value. The term "short-term" refers to investments which have a remaining term of one year or less at time of purchase. The term "nonparticipating" means that the investment's value does not vary with market interest rate changes. Nonnegotiable certificates of deposit are examples of nonparticipating interest-earning investment contracts.

The District's investments in external investment pools are reported at an amount determined by the fair value per share of the pool's underlying portfolio, unless the pool is 2a7-like, in which case they are reported at share value. A 2a7-like pool is one which is not registered with the Securities and Exchange Commission ("SEC") as an investment company, but nevertheless has a policy that it will, and does, operate in a manner consistent with the SEC's Rule 2a7 of the Investment Company Act of 1940.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

D. Capital Assets

Capital asset activity for the year ended June 30, 2018 was as follows:

	Beginning Balances	Increases	Decreases	Ending Balances
Governmental activities:				
Capital assets not being depreciated:				
Land	\$ 3,000	\$ -	\$ -	\$ 3,000
Total capital assets not being depreciated	<u>3,000</u>	<u>-</u>	<u>-</u>	<u>3,000</u>
Capital assets being depreciated:				
Buildings	7,211,079	106,990	-	7,318,069
Improvements	251,457	53,499	-	304,956
Equipment	772,221	135,630	-	907,851
Total capital assets being depreciated	<u>8,234,757</u>	<u>296,119</u>	<u>-</u>	<u>8,530,876</u>
Less accumulated depreciation for:				
Buildings	(1,787,589)	(194,717)	-	(1,982,306)
Improvements	(21,978)	(13,861)	-	(35,839)
Equipment	(704,183)	(48,045)	-	(752,228)
Total accumulated depreciation	<u>(2,513,750)</u>	<u>(256,623)</u>	<u>-</u>	<u>(2,770,373)</u>
Total capital assets being depreciated, net	<u>5,721,007</u>	<u>39,496</u>	<u>-</u>	<u>5,760,503</u>
Governmental activities capital assets, net	<u>\$ 5,724,007</u>	<u>\$ 39,496</u>	<u>\$ -</u>	<u>\$ 5,763,503</u>

Depreciation was charged to functions as follows:

Instruction	\$ 202,875
Instruction-Related Services	6,158
Pupil Services	33,547
General Administration	2,876
Plant Services	11,167
	<u>\$ 256,623</u>

E. Accounts Receivable

Accounts receivable at June 30, 2018 consisted of:

	General Fund	Nonmajor Governmental Funds	Total Governmental Funds
Federal Government:			
Federal programs	\$ 287,687	\$ -	\$ 287,687
State Government:			
Lottery	6,099	-	6,099
LCFF	93,654	-	93,654
Other state programs	24,615	-	24,615
Local Sources:			
Interest	17,837	-	17,837
Other local sources	2,496,963	10,107	2,507,070
Totals	<u>\$ 2,926,855</u>	<u>\$ 10,107</u>	<u>\$ 2,936,962</u>

All accounts receivable are considered to be collectible in full and as such no allowance for doubtful accounts has been established.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

F. Interfund Balances and Activities

1. Due To and From Other Funds

Balances due to and due from other funds at June, 30 2018 consisted of the following:

<u>Due To Fund</u>	<u>Due From Fund</u>	<u>Amount</u>	<u>Purpose</u>
Child Development Fund	General Fund	\$ 12,749	Expense reimbursements
Cafeteria Fund	General Fund	13,755	Expense reimbursements
Building Fund	General Fund	3,000	Expense reimbursements
General Fund	Child Development	8,629	Expense reimbursements
General Fund	Cafeteria Fund	4,347	Expense reimbursements
	Total	<u>\$ 42,480</u>	

All amounts due are scheduled to be repaid within one year.

2. Transfers To and From Other Funds

Transfers to and from other funds at June 30, 2018 consisted of the following:

<u>Transfers From</u>	<u>Transfers To</u>	<u>Amount</u>	<u>Reason</u>
General Fund	General Fund	\$ 1,323,644	Transfer of funds
General Fund	Child Development Fund	29,621	Cash contribution
General Fund	Cafeteria Fund	24,102	Cash contribution
	Total	<u>\$ 1,377,367</u>	

G. Short-Term Debt Activity

The District accounts for short-term debts for maintenance purposes through the General Fund. The proceeds from loans are shown in the financial statements as Other Resources. During the year ended June 30, 2018, the District did not enter into any short-term debt agreements.

H. Accounts Payable

Accounts payable at June 30, 2018 consisted of:

	<u>General Fund</u>	<u>Nonmajor Governmental Funds</u>	<u>Total Governmental Funds</u>
Vendor payables	\$ 90,874	\$ -	\$ 90,874
LCFF state aid	93,654	-	93,654
Pension related liabilities	17,539	-	17,539
Charter school payables	6,845,795	-	6,845,795
Payroll and benefits	5,501	-	5,501
Other	-	1,823	1,823
Totals	<u>\$ 7,053,363</u>	<u>\$ 1,823</u>	<u>\$ 7,055,186</u>

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

I. Unearned Revenue

Unearned revenue at June 30, 2018 consisted of:

	<u>General Fund</u>
Federal Government:	
Indian Education	\$ 4,423
Title I	15,822
Title V	1,343
Total	<u>21,588</u>

J. Deferred Outflows of Resources

In accordance with GASB Statement No. 68 & 71, payments made subsequent to the net pension liability measurement date are recorded as deferred outflows of resources.

In accordance with GASB Statement No. 75, payments made subsequent to the total OPEB liability measurement date, and other items are recorded as deferred outflows of resources.

A summary of the deferred outflows of resources as of June 30, 2018 is as follows:

<u>Description</u>	<u>Amortization Term</u>	<u>Balance July 1, 2017</u>	<u>Additions</u>	<u>Current Year Amortization</u>	<u>Balance June 30, 2018</u>
Pension related	Varies	\$ 388,655	\$ 720,111	\$ 335,497	\$ 773,269
OPEB related	Varies	-	16,148	-	16,148
Total Deferred Outflows of Resources		<u>\$ 388,655</u>	<u>\$ 736,259</u>	<u>\$ 335,497</u>	<u>\$ 789,417</u>

Future amortization of deferred outflows of resources is as follows:

<u>Year Ending June 30,</u>	<u>Pension Related</u>	<u>OPEB Related</u>
2019	\$ 356,311	\$ 16,148
2020	171,024	-
2021	138,974	-
2022	106,960	-
Total	<u>\$ 773,269</u>	<u>\$ 16,148</u>

K. Deferred Inflows of Resources

In accordance with GASB Statement No. 68 & 71, payments received subsequent to the net pension liability measurement date are recorded as deferred inflows of resources.

In accordance with GASB Statement No. 75, payments made subsequent to the total OPEB liability measurement date, and other items are recorded as deferred inflows of resources.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
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A summary of the deferred inflows of resources as of June 30, 2018 is as follows:

Description	Amortization Term	Balance July 1, 2017	Additions	Current Year Amortization	Balance June 30, 2018
Pension related	Varies	\$ 277,241	\$ 474,562	\$ 191,892	\$ 559,911
OPEB related	Varies	881	-	110	771
Total Deferred Inflows of Resources		\$ 278,122	\$ 474,562	\$ 192,002	\$ 560,682

Future amortization of deferred inflows of resources is as follows:

Year Ending June 30,	Pension Related	OPEB Related
2019	\$ 191,894	\$ 110
2020	153,759	110
2021	119,348	110
2022	94,910	110
2023		110
2024-2038		221
Total	\$ 559,911	\$ 771

L. Long-Term Obligations

1. Long-Term Obligation Activity

Long-term obligations include debt and other long-term liabilities. Changes in long-term obligations for the year ended June 30, 2018, are as follows:

	Beginning Balance	Increases	Decreases	Ending Balance	Amounts Due Within One Year
Governmental activities:					
General obligation bonds					
Principal balance	\$ 4,590,844	\$ -	\$ 4,775	\$ 4,586,069	\$ 24,263
Accreted interest	82,893	28,666	-	111,559	737
Bond premium	327,890	-	12,436	315,454	12,436
Total GO bonds	5,001,627	28,666	17,211	5,013,082	37,436
Net pension liability	2,161,294	138,318	-	2,299,612	-
Compensated absences *	15,536	19,443	-	34,979	34,979
Total OPEB liability	131,338	1,612	-	132,950	-
Total governmental activities	\$ 7,309,795	\$ 188,039	\$ 17,211	\$ 7,480,623	\$ 72,415

* Other long-term liabilities

The funds typically used to liquidate other long-term liabilities in the past are as follows:

Liability	Activity Type	Fund
Compensated absences	Governmental	General

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

2. General Obligation Bonds

General obligation bonds at June 30, 2018 consisted of the following:

	Date of Issue	Interest Rate	Maturity Date	Amount of Original Issue
2010 Election Series A	07/12/2012	3.00-5.25%	08/01/2043	\$ 2,499,852
2012 Election Series A	05/20/2014	3.75-5.50%	08/01/2044	2,170,992
				<u>\$ 4,670,844</u>
	Beginning Balance	Increases	Decreases	Ending Balance
2010 Election Series A				
Principal balance	\$ 2,419,852	\$ -	\$ -	\$ 2,419,852
Accreted interest	38,223	10,566	-	48,789
Bond premium	187,518	-	7,212	180,306
Total 2010-A Bonds	<u>2,645,593</u>	<u>10,566</u>	<u>7,212</u>	<u>2,648,947</u>
2012 Election Series A				
Principal balance	2,170,992	-	4,775	2,166,217
Accreted interest	44,670	18,100	-	62,770
Bond premium	140,372	-	5,224	135,148
Total 2012-A Bonds	<u>2,356,034</u>	<u>18,100</u>	<u>9,999</u>	<u>2,364,135</u>
Total GO Bonds	<u>\$ 5,001,627</u>	<u>\$ 28,666</u>	<u>\$ 17,211</u>	<u>\$ 5,013,082</u>

The annual requirements to amortize the bonds outstanding at June 30, 2018 are as follows:

Year Ending June 30.	Principal	Accreted Interest	Interest	Total
2019	\$ 24,263	\$ 737	\$ 195,063	\$ 220,063
2020	23,942	1,058	193,963	218,963
2021	32,848	2,152	193,763	228,763
2022	41,286	3,714	192,863	237,863
2023	54,311	5,689	191,663	251,663
2024-2028	397,357	67,643	932,100	1,397,100
2029-2033	541,133	267,116	867,813	1,676,062
2034-2038	908,076	323,826	780,731	2,012,633
2039-2043	1,797,853	102,148	476,875	2,376,876
2044-2048	765,000	-	32,617	797,617
Totals	<u>\$ 4,586,069</u>	<u>\$ 774,083</u>	<u>\$ 4,057,451</u>	<u>\$ 9,417,603</u>

3. Bond Premium

Bond premium arises when the market rate of interest is lower than the stated interest rate on the bond. Generally Accepted Accounting Principles (GAAP) require that the premium increase the face value of the bond and then amortize the premium over the life of the bond. The premiums are amortized over the life of the bond using the effective interest rate method.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

The following bonds were issued at a premium resulting in effective interest as follows:

	2010 Series A Bonds	2012 Series A Bonds
Total Interest	\$ 3,075,100	\$ 2,659,700
Less Bond Premium	(223,578)	(156,719)
Net Interest	<u>\$ 2,851,522</u>	<u>\$ 2,502,981</u>
Par Amount of Bonds	\$ 2,499,582	\$ 2,170,992
Periods	30	30
Effective Interest Rate	3.80%	3.84%

4. Accreted Interest

Accreted interest in the Long-Term Obligation Activity chart represents amounts that have compounded as of June 30, 2018 for bonds which were issued as capital appreciation bonds. Accreted interest in the repayment schedules represent the entire amount that will be repaid in the years the accreted interest becomes due.

5. Compensated Absences

Total unpaid employee compensated absences as of June 30, 2018 amounted to \$34,979. This amount is included as part of long-term liabilities in the government-wide financial statements.

6. Net Pension Liability

The District's beginning net pension liability was \$2,161,294 and increased by \$138,318 during the year ended June 30, 2018. The ending net pension liability at June 30, 2018 was \$2,299,612. See Note N for additional information regarding the net pension liability.

7. Total OPEB Liability

The District's beginning total OPEB liability was \$131,338 and increased during the year ended June 30, 2018 by \$1,612. The ending total OPEB liability at June 30, 2018 was \$132,950. See Note O for additional information regarding the net OPEB liability.

M. Joint Ventures (Joint Powers Agreements)

The District participates in two joint powers agreement (JPA) entities, the San Diego County Schools Risk Management (SDCSR) and the Fringe Benefit Consortium (FBC). The relationship between the District and the JPAs are such that the JPAs are not component units of the District.

The JPAs arrange for and provide for various types of insurances for its member districts as requested. The JPAs are governed by boards consisting of a representative from each member district. The boards control the operations of the JPAs, including selection of management and approval of operating budgets, independent of any influence by the member districts beyond their representation on the board. Each member district pays a premium commensurate with the level of coverage requested and shares surpluses and deficits proportionate to their participation in the JPAs.

Financial information on the District's share of the SDCSR and FBC JPAs JPA for the year ended June 30, 2018 was not available at the time this report was issued. The information can be obtained by contacting the JPAs directly.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

N. Pension Plans

1. General Information About the Pension Plans

a. Plan Descriptions

Qualified employees are covered under multiple-employer defined benefit pension plans maintained by agencies of the State of California. Certificated employees are members of the California State Teachers Retirement System (CalSTRS) and classified employees are members of the California Public Employees' Retirement System (CalPERS). Benefit provisions under the Plans are established by State statute and Local Government resolution. Support by the State for the CalSTRS plan is such that the plan has a special funding situation as defined by GASB Statement No. 68. CalSTRS and CalPERS issue publicly available reports that include a full description of the pension plans regarding benefit provisions, assumptions and membership information that can be found on their respective websites.

b. Benefits Provided

CalSTRS and CalPERS provide service retirement and disability benefits, annual cost of living adjustments and death benefits to plan members. Benefits are based on years of credited service, equal to one year of full-time employment. Members with five years of total service are eligible to retire at age 62 for normal benefits or at age 55 with statutorily reduced benefits. Employees hired prior to January 1, 2013 are eligible to retire at age 60 for normal benefits or at age 55 with statutorily reduced benefits. All members are eligible for non-duty disability benefits after 10 years of service. All members are eligible for death benefits after one year of total service.

The Plans' provisions and benefits in effect at June 30, 2018 are summarized as follows:

	CalSTRS	
	Before Jan. 1, 2013	On or After Jan. 1, 2013
Hire Date		
Benefit Formula	2% at 60	2% at 62**
Benefit Vesting Schedule	5 Years	5 Years
Benefit Payments	Monthly for Life	Monthly for Life
Retirement Age	50-62	55-67
Monthly Benefits as a % of Eligible Compensation	1.1-2.4%	1.0-2.4%*
Required Employee Contribution Rates (at June 30, 2018)	10.250%	9.205%
Required Employer Contribution Rates (at June 30, 2018)	14.430%	14.430%
Required State Contribution Rates (at June 30, 2018)	7.863%	7.863%

*Amounts are limited to 120% of Social Security Wage Base.

**The rate imposed on CalSTRS 2% at 62 members is based on the normal cost of benefits.

	CalPERS	
	Before Jan. 1, 2013	On or After Jan. 1, 2013
Hire Date		
Benefit Formula	2% at 55	2% at 62
Benefit Vesting Schedule	5 Years	5 Years
Benefit Payments	Monthly for Life	Monthly For Life
Retirement Age	50-62	52-67
Monthly Benefits as a % of Eligible Compensation	1.1-2.5%	1.1-2.5%*
Required Employee Contribution Rates (at June 30, 2018)	7.000%	6.500%
Required Employer Contribution Rates (at June 30, 2018)	15.531%	15.531%

*Amounts are limited to 120% of Social Security Wage Base.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

c. Contributions

CalSTRS

For the measurement period ended June 30, 2017 (measurement date), Section 22950 of the California Education Code requires members to contribute monthly to the system 9.205% (if hired on or after January 1, 2013) or 10.25% (if hired before January 1, 2013) of the creditable compensation upon which members' contributions under this part are based. In addition, the employer required rates established by the CalSTRS Board have been established at 12.58% of creditable compensation for the measurement period ended June 30, 2017 and 14.43% for the fiscal year ended June 30, 2018. Rates are defined in Section 22950.5 through measurement period ending June 30, 2021. Beginning in the fiscal year 2021-22 and for each fiscal year thereafter, the CalSTRS Board has the authority to increase or decrease percentages paid specific to reflect the contribution required to eliminate by June 30, 2046, the remaining unfunded actuarial obligation with respect to service credited to members before July 1, 2014, as determined by the Board based upon a recommendation from its actuary.

CalPERS

Section 20814(c) of the California Public Employees' Retirement Law requires that the employer contribution rates for all public employers be determined on an annual basis by the actuary and shall be effective on the July 1 following notice of a change in the rate. The CalPERS Board retains the authority to amend contribution rates. The total plan contributions are determined through CalPERS' annual actuarial valuation process. The actuarially determined rate is the estimated amount necessary to finance the costs of benefits earned by employees during the year, with an additional amount to finance any unfunded accrued liability. The employer is required to contribute the difference between the actuarially determined rate and the contribution rate of employees. For the measurement period ending June 30, 2017 (measurement date), employees hired prior to January 1, 2013 paid in 7.00%, employees hired on or after January 1, 2013 paid in 6.00%, and the employer contribution rate was 13.888% of covered payroll. For the fiscal year ending June 30, 2018, employees hired prior to January 1, 2013 contributed 7.00%, employees hired on or after January 1, 2013 contributed 6.50%, and the employer's contribution rate was 15.531%.

On Behalf Payments

Consistent with Section 22955.1 of the California Education Code, the State of California makes contributions to CalSTRS on behalf of employees working for the District. For the measurement period ended June 30, 2017 (measurement date) the State contributed 7.429% of salaries creditable to CalSTRS. In accordance with GASB 85 the District recorded these contributions as revenue and expense in the fund financial statements based on contributions made for the measurement period (current financial resources measurement focus). The government-wide financial statements have recorded revenue and expense for pension expense paid on behalf of the District (economic resources measurement focus). On behalf payments have been excluded from the calculation of available reserves, and have not been included in the budgeted amounts reported in the General Fund Budgetary Comparison Schedule. Contributions reported each fiscal year are based on the District's proportionate share of the States contribution for the measurement period.

Contributions made by the State on behalf of the District for the past three fiscal years are as follows:

Year Ended June 30,	Contribution Rate	Contribution Amount
2016	4.720%	\$ 41,880
2017	6.830%	54,429
2018	7.429%	59,561

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
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The State's pension expense associated with District employees for the past three fiscal years are as follows:

Year Ended June 30,	On Behalf Pension Expense
2016	\$ 79,995
2017	134,329
2018	36,194

d. Contributions Recognized

For the measurement period ended June 30, 2017 (fiscal year June 30, 2018), the contributions recognized for each plan were:

	CalSTRS	CalPERS	Total
Contributions - Employer	\$ 100,299	\$ 67,622	\$ 167,921
Contributions - State On Behalf Payments	59,561	-	59,561
Total Contributions	\$ 159,860	\$ 67,622	\$ 227,482

2. Pension Liabilities, Pension Expenses and Deferred Outflows/Inflows of Resources Related to Pensions

As of June 30, 2018 the District reported net pension liabilities for its proportionate shares of the net pension liability of each plan as follows:

	CalSTRS	CalPERS	Total
Proportionate Share of Net Pension Liability - Governmental	\$ 1,394,600	\$ 905,012	\$ 2,299,612

The District's net pension liability for each Plan is measured as the proportionate share of the net pension liability. The net pension liability of each of the Plans is measured as of June 30, 2017. The total pension liability for each Plan used to calculate the net pension liability was determined by an actuarial valuation as of June 30, 2016 rolled forward to measurement date June 30, 2017 using standard update procedures. The District's proportion of the net pension liability was based on a projection of the District's long-term share of contributions to the pension plans relative to the projected contributions of all participating employers, as actuarially determined.

The District's proportionate share of the net pension liability for each Plan as of June 30, 2017 and June 30, 2018 were as follows:

	CalSTRS		
	District's Proportionate Share	State's Proportionate Share	Total For District Employees
Proportion June 30, 2017	0.0018%	0.0010%	0.0028%
Proportion June 30, 2018	0.0015%	0.0009%	0.0024%
Change in Proportion	-0.0003%	-0.0001%	-0.0004%
	CalPERS		
	District's Proportionate Share		
Proportion June 30, 2017	0.0036%		
Proportion June 30, 2018	0.0038%		
Change in Proportion	0.0002%		

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

a. Pension Expense

For the measurement period ended June 30, 2017 (fiscal year June 30, 2018), pension expense was recognized as follows:

	CalSTRS	CalPERS	Total
Change in Net Pension Liability (Asset)	\$ (48,941)	\$ 187,259	\$ 138,318
State On Behalf Pension Expense	36,194	-	36,194
Employer Contributions to Pension Expense	106,305	75,979	182,284
(Increase) Decrease in Deferred Outflows of Resources			
Employer Contributions Subsequent to Measurement Date	(12,891)	(7,920)	(20,811)
Differences between actual and expected experiences	(4,814)	(4,518)	(9,332)
Changes in assumptions	(241,135)	(141,004)	(382,139)
Changes in proportionate share	-	(24,778)	(24,778)
Net difference between projected and actual earnings	128	52,318	52,446
Increase (Decrease) in Deferred Inflows of Resources			
Differences between actual and expected experiences	(193)	-	(193)
Changes in assumptions	-	(9,358)	(9,358)
Changes in proportionate share	137,132	(7,444)	129,688
Net difference between projected and actual earnings	131,992	30,541	162,533
Total Pension Expense	<u>\$ 103,777</u>	<u>\$ 151,075</u>	<u>\$ 254,852</u>

b. Deferred Outflows and Inflows of Resources

At June 30, 2018, the District reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

	Deferred Outflows of Resources		
	CalSTRS	CalPERS	Total
Pension contributions subsequent to measurement date	\$ 109,305	\$ 75,959	\$ 185,264
Differences between actual and expected experience	4,814	42,283	47,097
Changes in assumptions	241,135	141,004	382,139
Changes in employer's proportionate share	-	24,778	24,778
Net difference between projected and actual earnings	289	133,702	133,991
Total Deferred Outflows of Resources	<u>\$ 355,543</u>	<u>\$ 417,726</u>	<u>\$ 773,269</u>

	Deferred Inflows of Resources		
	CalSTRS	CalPERS	Total
Differences between actual and expected experience	\$ (309)	-	\$ (309)
Changes in assumptions	-	(18,717)	(18,717)
Changes in employer's proportionate share	(281,279)	(21,005)	(302,284)
Net difference between projected and actual earnings	(131,992)	(106,609)	(238,601)
Total Deferred Inflows of Resources	<u>\$ (413,580)</u>	<u>\$ (146,331)</u>	<u>\$ (559,911)</u>

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

Pension contributions made subsequent to the measurement date reported as deferred outflows of resources will be recognized as a portion of pension expense in the year ended June 30, 2019. The remaining amounts reported as deferred outflows or deferred inflows of resources will be recognized as an increase or decrease to pension expense over a five year period. Pension expense resulting from deferred outflows and deferred inflows of resources will be recognized as follows:

Year Ended June 30,	Governmental Activities				
	Deferred Outflows of Resources		Deferred Inflows of Resources		Net Effect on Expenses
	CalSTRS	CalPERS	CalSTRS	CalPERS	
2019	\$ 170,922	\$ 185,389	\$ (119,913)	\$ (71,981)	\$ 164,417
2020	61,616	109,408	(119,814)	(33,945)	17,265
2021	61,520	77,454	(96,086)	(23,262)	19,626
2022	61,485	45,475	(77,767)	(17,143)	12,050
Total	\$ 355,543	\$ 417,726	\$ (413,580)	\$ (146,331)	\$ 213,358

c. Actuarial Assumptions

The total pension liabilities in the June 30, 2017 actuarial valuations were determined using the following actuarial assumptions:

	CalSTRS	CalPERS
Valuation Date	June 30, 2016	June 30, 2016
Measurement Date	June 30, 2017	June 30, 2017
Actuarial Cost Method	Entry Age Normal	Entry Age Normal
Actuarial Assumptions:		
Discount Rate	7.10%	7.15%
Inflation	2.75%	2.75%
Wage Growth	3.50%	3.00%
Projected Salary Increase	0.5% - 6.4% (1)	3.10% - 9.00% (1)
Investment Rate of Return	7.10% (2)	7.50% (2)
Mortality	0.073%-22.86% (3)	0.466%-32.536% (3)

- (1) Depending on age, service and type of employment
- (2) Net of pension plan investment expenses, including inflation
- (3) RP2000 series tables adjusted to fit CalSTRS/CalPERS specific experience.

d. Discount Rate

The discount rate used to measure the total pension liability was 7.1000% for CalSTRS and 7.1500% for CalPERS. The projection of cash flows used to determine the discount rate assumed the contributions from plan members, employers, and state contributing agencies will be made at statutory contribution rates. To determine whether the District bond rate should be used in the calculation of a discount rate for each plan, CalSTRS and CalPERS stress tested plans that would most likely result in a discount rate that would be different from the actuarially assumed discount rate. Based on the testing, none of the tested plans run out of assets. Therefore, the current discount rates are adequate and the use of the District bond rate calculation is not necessary for either plan. The stress test results are presented in a detailed report that can be obtained from CalPERS and CalSTRS websites.

The CalPERS discount rate was increased from 7.50% to 7.65% at measurement date June 30, 2015 (Fiscal year June 30, 2016) to correct for an adjustment to exclude administrative expenses. Subsequently CalPERS discount rate was decreased from 7.65% to 7.15% at measurement date June 30, 2017 (Fiscal year June 30, 2018) to adjust for changes resulting from actuarially determined amounts.

The CalSTRS discount rate was adjusted from 7.60% to 7.10% for measurement date June 30, 2017 (Fiscal year June 30, 2018) to adjust for changes resulting from a new actuarial experience study.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

According to Paragraph 30 of GASB Statement No. 68, the long-term discount rate should be determined without reduction for pension plan administrative expense. The investment return assumption used in the accounting valuation is net of administrative expenses. Administrative expenses are assumed to be 15 basis points. Using this lower discount rate has resulted in a slightly higher Total Pension Liability and Net Pension Liability. CalSTRS and CalPERS checked the materiality threshold for the difference in calculation and did not find it to be a material difference.

CalSTRS and CalPERS are scheduled to review all actuarial assumptions as part of their regular Asset Liability Management (ALM) review cycle that is scheduled to be completed in February 2018. Any changes to the discount rate will require board action and proper stakeholder outreach. For these reasons, CalSTRS and CalPERS expect to continue using a discount rate net of administrative expenses for GASB 67 and GASB 68 calculations through at least the 2017-18 fiscal year. CalSTRS and CalPERS will continue to check the materiality of the difference in calculation until such time as they have changed their methodology.

The long-term expected rate of return on pension plan investments was determined using a building-block method in which best-estimate ranges of expected future real rates of return (expected returns, net of pension plan investment expense and inflation) are developed for each major asset class.

In determining the long-term expected rate of return, CalSTRS and CalPERS took into account both short-term and long-term market return expectations as well as the expected pension fund cash flows. Using historical returns of all the funds' asset classes, expected compound returns were calculated over the short-term (first 10 years) and long-term (11-60 years) using a building-block approach. Using the expected nominal returns for both short-term and long-term, the present value of benefits was calculated for each fund. The expected rate of return was set by calculating the single equivalent expected return that arrived at the same present value of benefits for cash flows as the one calculated using both short-term and long-term returns. The expected rate of return was then set equivalent to the single equivalent rate calculated above and rounded down to the nearest quarter of one percent.

The tables below reflects the long-term expected real rate of return by asset class. The rate of return was calculated using the capital market assumptions applied to determine the discount rate and asset allocation. These rates of return are net of administrative expenses.

CalSTRS		
Asset Class	Assumed Allocation 06/30/2017	Long Term Expected Return*
Global Equity	47.00%	6.30%
Fixed Income	12.00%	0.30%
Real Estate	13.00%	5.20%
Private Equity	13.00%	9.30%
Absolute Return	9.00%	2.90%
Inflation Sensitive	4.00%	3.80%
Cash/Liquidity	2.00%	-1.00%

*20 year geometric average used for long term expected real rate of return

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
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CalPERS			
Asset Class	Assumed Allocation 06/30/2017	Real Return Years 1-10(1)	Real Return Years 11+(2)
Global Equity	47.00%	4.90%	5.38%
Fixed Income	19.00%	0.80%	2.27%
Inflation Assets	6.00%	0.60%	1.39%
Private Equity	12.00%	6.60%	6.63%
Real Estate	11.00%	2.80%	5.21%
Infrastructure	3.00%	3.90%	5.36%
Liquidity	2.00%	-0.40%	-0.90%

- (1) An expected inflation of 2.5% used for this period
(2) An expected inflation of 3.0% used for this period

e. Sensitivity to Proportionate Share of the Net Pension Liability to Changes in the Discount Rate

The following represents the District's proportionate share of the net pension liability for each Plan, calculated using the discount rate for each Plan, as well as what the District's proportionate share of the net pension liability would be if it were calculated using a discount rate that is 1 percentage point lower or 1 percentage point higher than the current rate:

	CalSTRS	CalPERS
1% Decrease	6.10%	6.15%
Net Pension Liability	\$ 2,047,719	\$ 1,331,563
Current Discount Rate	7.10%	7.15%
Net Pension Liability	\$ 1,394,600	\$ 905,012
1% Increase	8.10%	8.15%
Net Pension Liability	\$ 864,554	\$ 551,153

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

f. Total Pension Liability, Pension Plan Fiduciary Net Position and Net Pension Liability

CalSTRS - Governmental Activities

	Increase (Decrease)				
	Total Pension Liability (a)	Plan Fiduciary Net Position (b)	Net Pension Liability (a) - (b)	State's Share of Net Pension Liability (c)	District's Share of Net Pension Liability (a) - (b) - (c)
Balance at June 30, 2017 (Previously Reported)	\$ 7,575,425	\$ 5,306,086	\$ 2,269,339	\$ 825,795	\$ 1,443,544
Changes for the year:					
Change in proportionate share	(1,087,452)	(761,689)	(325,763)	(101,910)	(223,853)
Service cost	145,718	-	145,718	54,273	91,445
Interest	486,055	-	486,055	181,032	305,023
Differences between expected and actual experience	9,588	-	9,588	3,571	6,017
Change in assumptions	480,312	-	480,312	178,893	301,419
Contributions:					
Employer	-	100,283	(100,283)	(37,350)	(62,933)
Employee	-	82,684	(82,684)	(30,796)	(51,888)
State On Behalf	-	59,552	(59,552)	(22,180)	(37,372)
Net investment income	-	604,719	(604,719)	(225,228)	(379,491)
Other income	-	1,730	(1,730)	(644)	(1,086)
Benefit payments, including refunds of employee contributions	(334,078)	(334,078)	-	-	-
Administrative expenses	-	(4,382)	4,382	1,632	2,750
Borrowing costs	-	(1,393)	1,393	518	875
Other expenses	-	(246)	246	92	154
Net Changes	(299,857)	(252,820)	(47,037)	1,903	(48,940)
Balance at June 30, 2018	\$ 7,275,568	\$ 5,053,266	\$ 2,222,302	\$ 827,702	\$ 1,394,600

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

CalPERS - Governmental Activities

	Increase (Decrease)		
	Total Pension Liability (a)	Plan Fiduciary Net Position (b)	Net Pension Liability (a) - (b)
Balance at June 30, 2017 (Previously Reported)	\$ 2,749,728	\$ 2,031,976	\$ 717,752
Changes for the year:			
Adjustment for change in proportionate share	118,657	87,685	30,972
Service cost	77,030	-	77,030
Interest	216,839	-	216,839
Differences between expected and actual experience	20,163	-	20,163
Changes in assumptions	176,255	-	176,255
Contributions - Employer	-	67,621	(67,621)
Contributions - Employee	-	34,022	(34,022)
Net plan to plan resource movement	-	(6)	6
Net investment income	-	235,489	(235,489)
Benefit payments, including refunds of employee contributions	(141,211)	(141,211)	-
Administrative expenses	-	(3,127)	3,127
Net Changes	467,733	280,473	187,260
Balance at June 30, 2018	\$ 3,217,461	\$ 2,312,449	\$ 905,012

Detailed information about each pension plan's fiduciary net position is available in the separately issued CalSTRS and CalPERS financial reports.

O. Postemployment Benefits Other Than Pension Benefits

1. General Information about the OPEB Plan

Plan Description

The District's defined benefit OPEB plan (the Plan), provides OPEB for all permanent fulltime employees of the District. The Plan is a single-employer defined benefit OPEB plan administered by the District. Authority to establish and amend the benefit terms and financing requirements lies with the District's board of directors. No assets are accumulated in a trust that meets the criteria in paragraph 4 of GASB Statement No. 75.

Benefits Provided

Employees Covered by Benefit Terms

At June 30, 2018, the following retirees were covered by the benefit terms:

Inactive employees or beneficiaries currently receiving benefit payments	2
Inactive employees entitled to but not yet receiving benefit payments	-
Active employees	19
Total number of participants	<u>21</u>

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

2. Total OPEB Liability

The District's total OPEB liability of \$132,950 was measured as of June 30, 2018, and was determined by an actuarial valuation as of that date.

Actuarial Assumptions and Other Inputs

The total OPEB liability in the June 30, 2018 actuarial valuation was determined using the following actuarial assumptions and other inputs, applied to all periods included in the measurement, unless otherwise specified:

Inflation	2.50% per annum
Salary Increases	3.00% per annum, in aggregate
Discount Rate	3.50% per annum
Healthcare Cost Trend Rates	6.50% decreasing to 5.00%
Retiree's Share of Costs	0.00% of projected premiums

The discount rate is the average, rounded to 5 basis points, of the range of 3-20 year municipal bond rate indices: S&P Municipal Bond 20 Year High Grade Rate Index, Bond Buyer 20-Bond GO Index, and Fidelity GO 20 Year Bond Index.

Mortality rates are based on the most recent rates used by CalPERS and CalSTRS for pension valuations. The CalPERS mortality table was developed based on CalPERS specific data. The table includes 20 years of mortality improvements using the Society of Actuaries Scale BB. The CalSTRS mortality table was developed based on CalSTRS specific data. The table includes mortality improvements set at 110% of the ultimate improvement factor from the Mortality Improvement Scale (MP-2016) table, issued by the Society of Actuaries.

The actuarial assumptions used in the June 30, 2017 valuation were based on the results of CalPERS actuarial experience study for the period July 1, 1997 through June 30, 2011 and the CalSTRS experience study for the period July 1, 2010 through June 30, 2015.

Changes in Total OPEB Liability

	<u>Total OPEB Liability</u>
Balance at June 30, 2017	\$ <u>131,338</u>
Changes for the year:	
Service cost	9,883
Interest	4,598
Changes in assumptions or other inputs	(881)
Benefit payments	<u>(11,988)</u>
Net changes	<u>1,612</u>
Balance at June 30, 2018	\$ <u><u>132,950</u></u>

There were no changes in benefit terms for the fiscal year ended June 30, 2018.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

Sensitivity of the Total OPEB Liability to Changes in the Discount Rate

The following presents the total OPEB liability of the District, as well as what the District's total OPEB liability would be if it were calculated using a discount rate that is 1-percentage-point lower (2.40%) or 1-percentage-point-higher (4.40%) than the current discount rate:

	<u>1% Decrease</u> <u>(2.50%)</u>	<u>Discount Rate</u> <u>(3.50%)</u>	<u>1% Increase</u> <u>(4.50%)</u>
Total OPEB Liability	\$ 142,159	\$ 132,950	\$ 124,588

Sensitivity of the Total OPEB Liability to Changes in the Healthcare Cost Trend Rates

The following presents the total OPEB liability of the District, as well as what the District's total OPEB liability would be if it were calculated using healthcare cost trend rates that are 1-percentage-point-lower (5.50% decreasing to 4.00% per year) or 1-percentage-point higher (7.50% decreasing to 6.00% per year) than the current healthcare cost trend rates:

	<u>1% Decrease</u> <u>5.50%</u> <u>decreasing to</u> <u>4.00%</u>	<u>Healthcare</u> <u>Cost Trend</u> <u>Rate</u> <u>6.50%</u> <u>decreasing to</u> <u>5.00%</u>	<u>1% Increase</u> <u>7.50%</u> <u>decreasing to</u> <u>6.00%</u>
Total OPEB Liability	\$ 122,468	\$ 132,950	\$ 145,318

3. OPEB Expense and Deferred Outflows of Resources and Deferred Inflows of Resources Related to OPEB

For the year ended June 30, 2018 the District recognized OPEB expense of \$14,371. At June 30, 2018 the District reported deferred outflows of resources related to the following sources:

	<u>Deferred</u> <u>Outflows of</u> <u>Resources</u>
Contributions made subsequent to measurement date	\$ <u>16,148</u>

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

P. Adjustments to Beginning Net Position

During the fiscal year ended June 30, 2018, the District implemented GASB Statement No. 75 "Accounting and Financial Reporting for Postemployment Benefits Other Than Pensions". Implementation of GASB Statement No. 75 resulted in a change in calculations of total OPEB liability as well as deferred outflows and deferred inflows of resources associated with OPEB. In addition, the District determined that OPEB would fully be accounted for in the government-wide financial statements. The changes due to accounting policies resulted in adjustment to the beginning net position. Beginning net position was adjusted as follows:

	Government Wide Financial Statements
Beginning Net Position - Originally Stated	\$ 1,305,126
Adjustments for Accounting Policy Change:	
Total OPEB Liability	104,148
Total Adjustments	104,148
Beginning Net Position - As Restated	\$ 1,409,274

Q. Components of Ending Fund Balance

As of June 30, 2018 components of ending fund balance consisted of:

	General Fund	Nonmajor Governmental Funds	Total Governmental Funds
Nonspendable Fund Balances			
Revolving Cash	\$ 2,707	\$ -	\$ 2,707
Restricted Fund Balances			
Lottery: Instructional Materials	9,598	1,181	10,779
Other Restricted	17,686	-	17,686
Assigned Fund Balances			
Deferred Maintenance	-	2	2
Debt Service	-	142,400	142,400
Capital Projects	-	277,272	277,272
Post Employment Benefits	770,084	-	770,084
Other Assigned	1,000,000	130,601	1,130,601
Unassigned Fund Balances			
For Economic Uncertainty	619,852	-	619,852
Other Unassigned	2,265,304	-	2,265,304
Total Fund Balance	\$ 4,685,231	\$ 551,456	\$ 5,236,687

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

R. Risk Management

The District is exposed to risk of losses due to:

- a. Torts,
- b. Theft of, damage to, or destruction of assets,
- c. Business interruption,
- d. Errors or omissions,
- e. Job related illnesses or injuries to employees,
- f. Natural disasters,
- g. Other risks associated with public entity risk pools

Risk management is the process of managing the District's activities to minimize the adverse effects of these risks. The main element of risk management are risk control (to minimize the losses that strike an organization) and risk financing (to obtain finances to provide for or restore the economic damages of those losses). Risk financing techniques include risk retention (self-insurance), risk transfer to and from an insurer, and risk transfer to a noninsurer.

The District has implemented the risk financing technique of risk transfer to an insurer. The District has purchased property & liability insurance as well as workers compensation insurance to cover any losses resulting from the risks identified above.

S. Commitments and Contingencies

Litigation

The District is involved in various litigation. In the opinion of management and legal counsel, the disposition of all litigation pending will not have a material effect on the financial statements.

State and Federal Allowances, Awards, and Grants

The District has received state and federal funds for specific purposes that are subject to review and audit by the grantor agencies. Although such audits could generate expenditure disallowances under terms of the grants, it is believed that any required reimbursement will not be material.

T. Subsequent Events

Implementation of New Accounting Guidance

The District has adopted accounting policies compliant with new pronouncements issued by the Government Accounting Standards Board (GASB) that are effective for the fiscal year ended June 30, 2019. Those newly implemented pronouncements are as follows:

GASB 83 - Certain Asset Retirement Obligations

This statement addresses accounting and financial reporting for certain asset retirement obligations (AROs). An ARO is a legally enforceable liability associated with the retirement of a tangible capital asset. A government that has legal obligations to perform future asset retirement activities related to its tangible capital assets should recognize a liability based on the guidance in this statement.

The District does not currently have any AROs and does not expect that implementation of the pronouncement will have an impact on the financial statements.

DEHESA SCHOOL DISTRICT
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2018

GASB 88 - Certain Disclosures Related to Debt, Including Direct Borrowing and Direct Placements

The primary objective of this statement is to improve the information that is disclosed in notes to government financial statements related to debt, including direct borrowings and direct placements. It also clarifies which liabilities governments should include when disclosing information related to debt.

This statement defines debt for purposes of disclosure in notes to financial statements as a liability that arises from a contractual obligation to pay cash (or other assets that may be used in lieu of cash) in one or more payments to settle an amount that is fixed at the date the contractual obligation is established. This statement requires that additional essential information related to debt be disclosed in notes to financial statements, including unused lines of credit; assets pledged as collateral for the debt; and terms specified in debt agreements related to significant events of default with finance-related consequences, significant termination events with finance-related consequences, and significant subjective acceleration clauses.

For notes to financial statements related to debt, this Statement also requires that existing and additional information be provided for direct borrowings and direct placements of debt separately from other debt.

Required Supplementary Information

Required supplementary information includes financial information and disclosures required by the Governmental Accounting Standards Board but not considered a part of the basic financial statements.

DEHESA SCHOOL DISTRICT
GENERAL FUND
BUDGETARY COMPARISON SCHEDULE
FOR THE YEAR ENDED JUNE 30, 2018

EXHIBIT B-1

	Budgeted Amounts		Actual	Variance with Final Budget Positive (Negative)
	Original	Final		
Revenues:				
LCFF Sources:				
State Apportionment or State Aid	\$ 1,077,908	\$ 1,116,243	\$ 1,058,974	\$ (57,269)
Education Protection Account Funds	176,807	175,315	193,148	17,833
Local Sources	130,722	114,298	152,809	38,511
Federal Revenue	360,422	389,664	327,120	(62,544)
Other State Revenue	139,287	382,821	387,384	4,563
Other Local Revenue	1,054,681	2,622,657	4,104,069	1,481,412
Total Revenues	<u>2,939,827</u>	<u>4,800,998</u>	<u>6,223,504</u>	<u>1,422,506</u>
Expenditures:				
Current:				
Certificated Salaries	748,432	869,390	834,307	35,083
Classified Salaries	455,482	506,120	479,806	26,314
Employee Benefits	507,631	534,177	523,821	10,356
Books And Supplies	160,101	288,673	152,260	136,413
Services And Other Operating Expenditures	729,988	1,829,195	1,837,246	(8,051)
Capital Outlay	-	233,500	136,930	96,570
Total Expenditures	<u>2,601,634</u>	<u>4,261,055</u>	<u>3,964,370</u>	<u>296,685</u>
Excess (Deficiency) of Revenues Over (Under) Expenditures	<u>338,193</u>	<u>539,943</u>	<u>2,259,134</u>	<u>1,719,191</u>
Other Financing Sources (Uses):				
Transfers In	55,000	317,800	630,600	312,800
Transfers Out	(47,949)	(384,825)	(1,064,567)	(679,742)
Total Other Financing Sources (Uses)	<u>7,051</u>	<u>(67,025)</u>	<u>(433,967)</u>	<u>(366,942)</u>
Net Change in Fund Balance	345,244	472,918	1,825,167	1,352,249
Fund Balance, July 1	470,128	470,128	470,128	-
Fund Balance, June 30	<u>\$ 815,372</u>	<u>\$ 943,046</u>	<u>\$ 2,295,295</u>	<u>\$ 1,352,249</u>

See Accompanying Notes to Required Supplementary Information

DEHESA SCHOOL DISTRICT
SCHEDULE OF THE DISTRICT'S PROPORTIONATE
SHARE OF THE NET PENSION LIABILITY
CALIFORNIA STATE TEACHERS' RETIREMENT SYSTEM
LAST TEN FISCAL YEARS *

	Fiscal Year									
	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
District's proportion of the net* pension liability (asset)	0.0015%	0.0018%	0.0019%	0.0021%	N/A	N/A	N/A	N/A	N/A	N/A
District's proportionate share of the net pension liability (asset)	\$ 1,394,600	\$ 1,443,542	\$ 1,290,433	\$ 1,238,358	N/A	N/A	N/A	N/A	N/A	N/A
State's proportionate share of the net pension liability (asset) associated with the District	828,127	1,051,456	807,887	818,116	N/A	N/A	N/A	N/A	N/A	N/A
Total	<u>\$ 2,222,727</u>	<u>\$ 2,494,998</u>	<u>\$ 2,098,320</u>	<u>\$ 2,056,474</u>	N/A	N/A	N/A	N/A	N/A	N/A
District's covered-employee payroll"	\$ 797,289	\$ 766,407	\$ 886,738	\$ 885,767	N/A	N/A	N/A	N/A	N/A	N/A
District's proportionate share of the net* pension liability (asset) as a percentage of its covered-employee payroll	174.92%	188.35%	145.53%	139.81%	N/A	N/A	N/A	N/A	N/A	N/A
Plan fiduciary net position as a percentage of the total pension liability	69.46%	70.04%	74.02%	76.52%	N/A	N/A	N/A	N/A	N/A	N/A

* This schedule is presented to illustrate the requirement to show information for 10 years. However, until a full 10-year trend is compiled, this schedule provides the information only for those years for which information is available.

See Accompanying Notes to Required Supplementary Information

DEHESA SCHOOL DISTRICT
SCHEDULE OF DISTRICT CONTRIBUTIONS
CALIFORNIA STATE TEACHERS RETIREMENT SYSTEM
LAST TEN FISCAL YEARS *

	Fiscal Year									
	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
Contractually required contribution	\$ 109,305	\$ 100,299	\$ 95,147	\$ 78,656	N/A	N/A	N/A	N/A	N/A	N/A
Contributions in relation to the contractually required contribution	(109,305)	(100,299)	(95,147)	(78,656)	N/A	N/A	N/A	N/A	N/A	N/A
Contribution deficiency (excess)	\$ -	\$ -	-	-	N/A	N/A	N/A	N/A	N/A	N/A
District's covered-employee payroll	\$ 757,482	\$ 797,289	886,738	885,767	N/A	N/A	N/A	N/A	N/A	N/A
Contributions as a percentage of covered-employee payroll	14.430%	12.580%	10.730%	8.880%	N/A	N/A	N/A	N/A	N/A	N/A

* This schedule is presented to illustrate the requirement to show information for 10 years. However, until a full 10-year trend is compiled, this schedule provides the information for those years for which information is available.

See Accompanying Notes to Required Supplementary Information

DEHESA SCHOOL DISTRICT
 SCHEDULE OF THE DISTRICT'S PROPORTIONATE
 SHARE OF THE NET PENSION LIABILITY
 CALIFORNIA PUBLIC EMPLOYEES RETIREMENT SYSTEM
 LAST TEN FISCAL YEARS *

	Fiscal Year									
	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
District's proportion of the net pension liability (asset)	0.0038%	0.0036%	0.0038%	0.0039%	N/A	N/A	N/A	N/A	N/A	N/A
District's proportionate share of the net pension liability (asset)	\$ 905,012	\$ 717,752	\$ 566,268	\$ 442,757	N/A	N/A	N/A	N/A	N/A	\$ N/A
District's covered-employee payroll	\$ 486,910	\$ 440,087	\$ 427,220	\$ 410,077	N/A	N/A	N/A	N/A	N/A	\$ N/A
District's proportionate share of the net pension liability (asset) as a percentage of its covered-employee payroll	185.87%	163.09%	132.55%	107.97%	N/A	N/A	N/A	N/A	N/A	N/A
Plan fiduciary net position as a percentage of the total pension liability	71.87%	73.90%	79.43%	83.38%	N/A	N/A	N/A	N/A	N/A	N/A

* This schedule is presented to illustrate the requirement to show information for 10 years. However, until a full 10-year trend is compiled, this schedule provides the information only for those years for which information is available.

See Accompanying Notes to Required Supplementary Information

DEHESA SCHOOL DISTRICT
 SCHEDULE OF DISTRICT CONTRIBUTIONS
 CALIFORNIA PUBLIC EMPLOYEES RETIREMENT SYSTEM
 LAST TEN FISCAL YEARS *

	Fiscal Year									
	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
Contractually required contribution	\$ 75,979	\$ 67,622	\$ 52,137	\$ 50,288	N/A	N/A	N/A	N/A	N/A	N/A
Contributions in relation to the contractually required contribution	(75,979)	(67,622)	(52,137)	(50,288)	N/A	N/A	N/A	N/A	N/A	N/A
Contribution deficiency (excess)	\$ -	\$ -	\$ -	\$ -	N/A	N/A	N/A	N/A	N/A	N/A
District's covered-employee payroll	\$ 489,210	\$ 486,910	\$ 440,086	\$ 427,220	N/A	N/A	N/A	N/A	N/A	N/A
Contributions as a percentage of covered-employee payroll	15.531%	13.888%	11.847%	11.771%	N/A	N/A	N/A	N/A	N/A	N/A

* This schedule is presented to illustrate the requirement to show information for 10 years. However, until a full 10-year trend is compiled, this schedule provides the information for those years for which information is available.

See Accompanying Notes to Required Supplementary Information.

DEHESA SCHOOL DISTRICT
SCHEDULE OF CHANGE IN THE DISTRICT'S
TOTAL OPEB LIABILITY AND RELATED RATIOS
DSD RETIREE HEALTH PLAN
LAST TEN FISCAL YEARS *

	Fiscal Year									
	2018	2017	SCHEDULE	2015	2014	2013	2012	2011	2010	2009
Total OPEB liability:										
Service cost	\$ 9,883	\$ N/A	\$ N/A	\$ N/A	\$ N/A	\$ N/A	\$ N/A	\$ N/A	\$ N/A	\$ N/A
Interest	4,598	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Changes of benefit terms	-	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Differences between expected and actual experience	-	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Changes of assumptions	(881)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Benefit payments	(11,988)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Net change in total pension liability	1,612	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total OPEB liability - beginning	131,336	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total OPEB liability - ending	\$ 132,948	\$ N/A	\$ N/A	\$ N/A	\$ N/A	\$ N/A	\$ N/A	\$ N/A	\$ N/A	\$ N/A
Covered-employee payroll	\$ 1,060,000	\$ N/A	\$ N/A	\$ N/A	\$ N/A	\$ N/A	\$ N/A	\$ N/A	\$ N/A	\$ N/A
District's OPEB liability as a percentage of covered-employee payroll	12.54%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

* This schedule is presented to illustrate the requirement to show information for 10 years. However, until a full 10-year trend is compiled, this schedule provides the information only for those years for which information is available.

See Accompanying Notes to Required Supplementary Information

DEHESA SCHOOL DISTRICT

NOTES TO REQUIRED SUPPLEMENTARY INFORMATION
FOR THE YEAR ENDED JUNE 30, 2018

Budgetary Comparison Schedule - General Fund

As described in Note A to these financial statements, for purposes of reporting in conformity with GASB Statement No. 54, the District's Special Reserve Fund for Other Than Capital Outlay (Fund 17) and Special Reserve Fund for Postemployment Benefits (Fund 20) was included with the General Fund. The Budgetary Comparison Schedule included in the Required Supplementary Information is based on the legally adopted budget for the General Fund only.

General Fund - Fund Financial Statements Ending Fund Balance	\$ 4,685,231
Less Fund 20 Fund Balance	(770,084)
Less Fund 17 Fund Balance	<u>(1,619,852)</u>
General Fund - Budgetary Comparison Schedule Ending Fund Balance	<u>\$ 2,295,295</u>
General Fund - Fund Financial Statements Net Change in Fund Balance	\$ 2,231,296
Change in Fund Balance attributed to Fund 20	(701,406)
Change in Fund Balance attributed to Fund 17	<u>295,277</u>
General Fund - Budgetary Comparison Schedule Change in Fund Balance	<u>\$ 1,825,167</u>

Excess of Expenditures Over Appropriations

As of June 30, 2018, expenditures exceeded appropriations in individual budgeted funds as follows:

<u>Appropriations Category</u>	<u>Excess Expenditures</u>	<u>Reason for Excess Expenditures</u>
General Fund:		
Services and Other Expenses \$	8,051	Unanticipated expenses

Amounts in excess of appropriations were not considered a violation of any laws, regulations, contracts or grant agreements and did not have a direct or material effect on the financial statements.

Schedule of District's Proportionate Share - California State Teachers' Retirement System

1) Benefit Changes: In 2015, 2016, 2017 & 2018 there were no changes to benefits

2) Changes in Assumptions: In 2015, 2016 & 2017 there were no changes in assumptions. In 2018 there was a change in discount rate from 7.60% to 7.10%.

Schedule of District's Contributions - California State Teachers' Retirement System

The total pension liability for California State Teachers Retirement System was determined by applying update procedures to the financial reporting actuarial valuation as of June 30, 2013, 2014, 2015 & 2016 and rolling forward the total pension liabilities to the June 30, 2014, 2015, 2016 & 2017 (measurement dates). In determining the total pension liability, the financial reporting actuarial valuation used the following actuarial methods and assumptions:

Reporting Period	June 30, 2015	June 30, 2016	June 30, 2017
Measurement Date	06/30/14	06/30/15	06/30/16
Valuation Date	06/30/13	06/30/14	06/30/15
Experience Study	07/01/06 - 06/30/10	07/01/06 - 06/30/10	07/01/06 - 06/30/10
Actuarial Cost Method	Entry Age Normal	Entry Age Normal	Entry Age Normal
Investment Rate of Return	7.60%	7.60%	7.60%
Consumer Price Inflation	3.00%	3.00%	3.00%
Wage Growth (Average)	3.75%	3.75%	3.75%
Post-retirement Benefit Increases	2.00% Simple	2.00% Simple	2.00% Simple

Reporting Period	June 30, 2018
Measurement Date	06/30/17
Valuation Date	06/30/16
Experience Study	07/01/10 - 06/30/15
Actuarial Cost Method	Entry Age Normal
Investment Rate of Return	7.10%
Consumer Price Inflation	2.75%
Wage Growth (Average)	3.50%
Post-retirement Benefit Increases	2.00% Simple

CalSTRS changed the mortality assumptions based on the July 1, 2010 through June 30, 2015 experience study adopted by the CalSTRS board in February 2017. CalSTRS uses a generational mortality assumption, which involves the use of a base mortality table and projection scales to reflect expected annual reductions in mortality rates at each age, resulting in increases in life expectancies each year into the future. The base mortality tables are CalSTRS custom tables derived to best fit the patterns of mortality among CalSTRS members. The projection scale was set equal to 110 percent of the ultimate improvement factor from the Mortality Improvement Scale (MP-2016) table, issued by the Society of Actuaries. Additional information can be obtained by reviewing the CalSTRS Actuarial Experience Study on CalSTRS website.

Schedule of District's Proportionate Share - California Public Employees Retirement System

- 1) Benefit Changes: In 2015, 2016, 2017 & 2018 there were no changes to benefits
- 2) Changes in Assumptions: In 2015 and 2017 there were no changes in assumptions. In 2016 the discount rate was changed from 7.5% to 7.65%. In 2018 the discount rate was changed from 7.65% to 7.15%.

Schedule of District's Contributions - California Public Employees' Retirement System

The total pension liability was determined by applying update procedures to a financial reporting actuarial valuation as of June 30, 2013, 2014, 2015, & 2016 and rolling forward the total pension liabilities to June 30, 2014, 2015, 2016 & 2017 (measurement dates). The financial reporting actuarial valuation as of June 30, 2014, June 30, 2015, June 30, 2016 and June 30, 2017 used the following actuarial methods and assumptions, applied to all prior periods included in the measurement:

Schedule of District's Proportionate Share - California Public Employees Retirement System

- 1) Benefit Changes: In 2015, 2016, 2017 & 2018 there were no changes to benefits
- 2) Changes in Assumptions: In 2015 and 2017 there were no changes in assumptions. In 2016 the discount rate was changed from 7.5% to 7.65%. In 2018 the discount rate was changed from 7.65% to 7.15%.

Schedule of District's Contributions - California Public Employees' Retirement System

The total pension liability was determined by applying update procedures to a financial reporting actuarial valuation as of June 30, 2013, 2014, 2015, & 2016 and rolling forward the total pension liabilities to June 30, 2014, 2015, 2016 & 2017 (measurement dates). The financial reporting actuarial valuation as of June 30, 2014, June 30, 2015, June 30, 2016 and June 30, 2017 used the following actuarial methods and assumptions, applied to all prior periods included in the measurement:

Reporting Period	June 30, 2015	June 30, 2016	June 30, 2017
Measurement Date	06/30/14	06/30/15	06/30/16
Valuation Date	06/30/13	06/30/14	06/30/15
Experience Study	07/01/97 - 06/30/11	07/01/97 - 06/30/11	07/01/97 - 06/30/11
Actuarial Cost Method	Entry Age Normal	Entry Age Normal	Entry Age Normal
Investment Rate of Return	7.50%	7.65%	7.65%
Consumer Price Inflation	2.75%	2.75%	2.75%
Wage Growth (Average)	3.00%	3.00%	3.00%
Post-retirement Benefit Increases	2.00% Simple	2.00% Simple	2.00% Simple

Reporting Period	June 30, 2018
Measurement Date	06/30/17
Valuation Date	06/30/16
Experience Study	07/01/97 - 06/30/11
Actuarial Cost Method	Entry Age Normal
Investment Rate of Return	7.15%
Consumer Price Inflation	2.75%
Wage Growth (Average)	3.00%
Post-retirement Benefit Increases	2.00% Simple

The mortality table used was developed based on CalPERS specific data. The table includes 20 years of mortality improvements using Society of Actuaries Scale BB. For more details on this table please refer to the April 2014 experience study report (based on demographic data from 1997 to 2011) available on CalPERS website.

Schedule of Changes in the District's Total OPEB Liability and Related Ratios

- 1) Benefit Changes: In 2018 there were no changes to benefits.
- 2) Changes in Assumptions: In 2018 there were no changes in assumptions.
- 3) No assets are accumulated in a trust that meets the criteria in GASB Statement No 75 Paragraph 4.
- 4) The following are the discount rates used for each period:

Year	Discount Rate
2018	3.50%

Combining Statements as Supplementary Information

This supplementary information includes financial statements and schedules not required by the Governmental Accounting Standards Board, nor a part of the basic financial statements, but are presented for purposes of additional analysis.

DEHESA SCHOOL DISTRICT
 COMBINING BALANCE SHEET
 NONMAJOR GOVERNMENTAL FUNDS
 JUNE 30, 2018

	Special Revenue Funds	Debt Service Fund Bond Interest & Redemption	Capital Projects Funds	Total Nonmajor Governmental Funds (See Exhibit A-3)
ASSETS:				
Cash in County Treasury	\$ 134,793	\$ 142,401	\$ 279,727	\$ 556,921
Cash on Hand and in Banks	2,779	-	-	2,779
Accounts Receivable	9,563	-	544	10,107
Due from Other Funds	12,976	-	-	12,976
Total Assets	<u>160,111</u>	<u>142,401</u>	<u>280,271</u>	<u>582,783</u>
LIABILITIES AND FUND BALANCE:				
Liabilities:				
Accounts Payable	\$ 1,823	\$ -	\$ -	\$ 1,823
Due to Other Funds	26,504	-	3,000	29,504
Total Liabilities	<u>28,327</u>	<u>-</u>	<u>3,000</u>	<u>31,327</u>
Fund Balance:				
Restricted Fund Balances	1,181	-	-	1,181
Assigned Fund Balances	130,603	142,401	277,271	550,275
Total Fund Balance	<u>131,784</u>	<u>142,401</u>	<u>277,271</u>	<u>551,456</u>
Total Liabilities and Fund Balances	<u>\$ 160,111</u>	<u>\$ 142,401</u>	<u>\$ 280,271</u>	<u>\$ 582,783</u>

DEHESA SCHOOL DISTRICT

COMBINING STATEMENT OF REVENUES, EXPENDITURES,
AND CHANGES IN FUND BALANCES
NONMAJOR GOVERNMENTAL FUNDS
FOR THE YEAR ENDED JUNE 30, 2018

	Special Revenue Funds	Debt Service Fund Bond Interest & Redemption	Capital Projects Funds	Total Nonmajor Governmental Funds (See Exhibit A-5)
Revenues:				
Federal Revenue	\$ 41,915	\$ -	\$ -	\$ 41,915
Other State Revenue	3,094	2,313	-	5,407
Other Local Revenue	38,122	233,986	265,434	537,542
Total Revenues	<u>83,131</u>	<u>236,299</u>	<u>265,434</u>	<u>584,864</u>
Expenditures:				
Current:				
Pupil Services	145,459	-	-	145,459
Plant Services	1,726	-	91,809	93,535
Capital Outlay	-	-	156,767	156,767
Debt Service:				
Principal	-	4,775	-	4,775
Interest	-	198,587	-	198,587
Total Expenditures	<u>147,185</u>	<u>203,362</u>	<u>248,576</u>	<u>599,123</u>
Excess (Deficiency) of Revenues Over (Under) Expenditures	<u>(64,054)</u>	<u>32,937</u>	<u>16,858</u>	<u>(14,259)</u>
Other Financing Sources (Uses):				
Transfers In	53,723	-	-	53,723
Total Other Financing Sources (Uses)	<u>53,723</u>	<u>-</u>	<u>-</u>	<u>53,723</u>
Net Change in Fund Balance	(10,331)	32,937	16,858	39,464
Fund Balance, July 1	142,115	109,464	260,413	511,992
Fund Balance, June 30	<u>\$ 131,784</u>	<u>\$ 142,401</u>	<u>\$ 277,271</u>	<u>\$ 551,456</u>

DEHESA SCHOOL DISTRICT
COMBINING BALANCE SHEET
NONMAJOR SPECIAL REVENUE FUNDS
JUNE 30, 2018

	Charter School Fund	Child Development Fund
ASSETS:		
Cash in County Treasury	\$ 131,182	\$ 2,761
Cash on Hand and in Banks	-	1,928
Accounts Receivable	600	651
Due from Other Funds	-	8,629
Total Assets	<u>131,782</u>	<u>13,969</u>
LIABILITIES AND FUND BALANCE:		
Liabilities:		
Accounts Payable	\$ -	\$ 1,220
Due to Other Funds	-	12,749
Total Liabilities	<u>-</u>	<u>13,969</u>
Fund Balance:		
Restricted Fund Balances	1,181	-
Assigned Fund Balances	130,601	-
Total Fund Balance	<u>131,782</u>	<u>-</u>
Total Liabilities and Fund Balances	<u>\$ 131,782</u>	<u>\$ 13,969</u>

EXHIBIT C-3

Cafeteria Fund	Deferred Maintenance Fund	Total Nonmajor Special Revenue Funds (See Exhibit C-1)
\$ 848	\$ 2	\$ 134,793
851	-	2,779
8,312	-	9,563
4,347	-	12,976
<u>14,358</u>	<u>2</u>	<u>160,111</u>
\$ 603	\$ -	\$ 1,823
13,755	-	26,504
<u>14,358</u>	<u>-</u>	<u>28,327</u>
-	-	1,181
<u>-</u>	<u>2</u>	<u>130,603</u>
<u>-</u>	<u>2</u>	<u>131,784</u>
<u>\$ 14,358</u>	<u>\$ 2</u>	<u>\$ 160,111</u>

DEHESA SCHOOL DISTRICT

COMBINING STATEMENT OF REVENUES, EXPENDITURES,
AND CHANGES IN FUND BALANCES
NONMAJOR SPECIAL REVENUE FUNDS
FOR THE YEAR ENDED JUNE 30, 2018

	Charter School Fund	Child Development Fund
Revenues:		
Federal Revenue	\$ -	\$ -
Other State Revenue	-	-
Other Local Revenue	1,972	25,564
Total Revenues	<u>1,972</u>	<u>25,564</u>
Expenditures:		
Current:		
Pupil Services	-	55,185
Plant Services	-	-
Total Expenditures	<u>-</u>	<u>55,185</u>
Excess (Deficiency) of Revenues Over (Under) Expenditures	<u>1,972</u>	<u>(29,621)</u>
Other Financing Sources (Uses):		
Transfers In	-	29,621
Total Other Financing Sources (Uses)	<u>-</u>	<u>29,621</u>
Net Change in Fund Balance	1,972	-
Fund Balance, July 1	129,810	-
Fund Balance, June 30	<u>\$ 131,782</u>	<u>\$ -</u>

EXHIBIT C-4

Cafeteria Fund	Deferred Maintenance Fund	Total Nonmajor Special Revenue Funds (See Exhibit C-2)
\$ 41,915	\$ -	\$ 41,915
3,094	-	3,094
<u>10,573</u>	<u>13</u>	<u>38,122</u>
<u>55,582</u>	<u>13</u>	<u>83,131</u>
90,274	-	145,459
-	1,726	1,726
<u>90,274</u>	<u>1,726</u>	<u>147,185</u>
<u>(34,692)</u>	<u>(1,713)</u>	<u>(64,054)</u>
24,102	-	53,723
<u>24,102</u>	<u>-</u>	<u>53,723</u>
(10,590)	(1,713)	(10,331)
10,590	1,715	142,115
<u>\$ -</u>	<u>\$ 2</u>	<u>\$ 131,784</u>

DEHESA SCHOOL DISTRICT
 COMBINING BALANCE SHEET
 NONMAJOR CAPITAL PROJECTS FUNDS
 JUNE 30, 2018

	<u>Building Fund</u>	<u>Capital Facilities Fund</u>	<u>Capital Outlay Projects</u>	<u>Total Nonmajor Capital Projects Funds (See Exhibit C-1)</u>
ASSETS:				
Cash in County Treasury	\$ 2,825	\$ 19,273	\$ 257,629	\$ 279,727
Accounts Receivable	381	90	73	544
Total Assets	<u>3,206</u>	<u>19,363</u>	<u>257,702</u>	<u>280,271</u>
LIABILITIES AND FUND BALANCE:				
Liabilities:				
Due to Other Funds	\$ 3,000	-	-	\$ 3,000
Total Liabilities	<u>3,000</u>	<u>-</u>	<u>-</u>	<u>3,000</u>
Fund Balance:				
Assigned Fund Balances	206	19,363	257,702	277,271
Total Fund Balance	<u>206</u>	<u>19,363</u>	<u>257,702</u>	<u>277,271</u>
Total Liabilities and Fund Balances	<u>\$ 3,206</u>	<u>\$ 19,363</u>	<u>\$ 257,702</u>	<u>\$ 280,271</u>

DEHESA SCHOOL DISTRICT

COMBINING STATEMENT OF REVENUES, EXPENDITURES,
AND CHANGES IN FUND BALANCES
NONMAJOR CAPITAL PROJECTS FUNDS
FOR THE YEAR ENDED JUNE 30, 2018

	Building Fund	Capital Facilities Fund	Capital Outlay Projects	Total Nonmajor Capital Projects Funds (See Exhibit C-2)
Revenues:				
Other Local Revenue	\$ 2,801	\$ 12,481	\$ 250,152	\$ 265,434
Total Revenues	<u>2,801</u>	<u>12,481</u>	<u>250,152</u>	<u>265,434</u>
Expenditures:				
Current:				
Plant Services	86,421	5,388	-	91,809
Capital Outlay	156,767	-	-	156,767
Total Expenditures	<u>243,188</u>	<u>5,388</u>	<u>-</u>	<u>248,576</u>
Excess (Deficiency) of Revenues Over (Under) Expenditures	<u>(240,387)</u>	<u>7,093</u>	<u>250,152</u>	<u>16,858</u>
Net Change in Fund Balance	<u>(240,387)</u>	<u>7,093</u>	<u>250,152</u>	<u>16,858</u>
Fund Balance, July 1	240,593	12,270	7,550	260,413
Fund Balance, June 30	<u>\$ 206</u>	<u>\$ 19,363</u>	<u>\$ 257,702</u>	<u>\$ 277,271</u>

Other Supplementary Information

This section includes financial information and disclosures not required by the Governmental Accounting Standards Board and not considered a part of the basic financial statements. It may, however, include information which is required by other entities.

Supplementary Information Section

DEHESA SCHOOL DISTRICT
 LOCAL EDUCATION AGENCY
 ORGANIZATION STRUCTURE
 JUNE 30, 2018

The Dehesa School District was established in 1876 and is comprised of approximately 19 square miles, located in San Diego County. There were no changes in the boundaries of the District during the year. The District is currently operating one K-8 elementary school and sponsors seven charter schools.

<u>Governing Board</u>		
<u>Name</u>	<u>Office</u>	<u>Term and Term Expiration</u>
Cynthia White	President	Four Year Term Expires November 2018
Karl Becker	Vice President	Four Year Term Expires November 2018
Christina Becker	Clerk	Four Year Term Expires November 2018
Mark Zacovic	Member	Four Year Term Expires November 2020
Karen Kirkpatrick	Member	One Year Term Expires November 2018

Administration

Nancy Hauer
 Superintendent

Heather Griffiths
 Principal

Anna Buxbaum
 Business Manager

DEHESA SCHOOL DISTRICT
SCHEDULE OF AVERAGE DAILY ATTENDANCE
YEAR ENDED JUNE 30, 2018

TABLE D-1

	Second Period Report		Annual Report	
	Original	Revised	Original	Revised
TK/K-3:				
Regular ADA	57.54	N/A	58.72	N/A
TK/K-3 Totals	57.54	N/A	58.72	N/A
Grades 4-6:				
Regular ADA	47.52	N/A	47.60	N/A
Grades 4-6 Totals	47.52	N/A	47.60	N/A
Grades 7 and 8:				
Regular ADA	27.30	N/A	27.45	N/A
Grades 7 and 8 Totals	27.30	N/A	27.45	N/A
ADA Totals	132.36	N/A	133.77	N/A

N/A - There were no audit findings which resulted in necessary revisions to attendance.

Average daily attendance is a measurement of the number of pupils attending classes of the district or charter school. The purpose of attendance accounting from a fiscal standpoint is to provide the basis on which apportionments of state funds are made to school districts and charter schools. This schedule provides information regarding the attendance of students at various grade levels and in different programs.

DEHESA SCHOOL DISTRICT
SCHEDULE OF INSTRUCTIONAL TIME
YEAR ENDED JUNE 30, 2018

TABLE D-2

<u>Grade Level</u>	<u>Ed. Code 46207 Minutes Requirement</u>	<u>2017-18 Actual Minutes</u>	<u>Number of Days Traditional Calendar</u>	<u>Number of Days Multitrack Calendar</u>	<u>Status</u>
Transitional Kindergarten	36,000	57,180	180	-	Complied
Kindergarten	36,000	57,180	180	-	Complied
Grade 1	50,400	53,580	180	-	Complied
Grade 2	50,400	53,580	180	-	Complied
Grade 3	50,400	57,180	180	-	Complied
Grade 4	54,000	57,180	180	-	Complied
Grade 5	54,000	57,180	180	-	Complied
Grade 6	54,000	57,180	180	-	Complied
Grade 7	54,000	57,180	180	-	Complied
Grade 8	54,000	57,180	180	-	Complied

School districts and charter schools must maintain their instructional minutes as defined in Education Code Section 46207. This schedule is required of all districts, including basic aid districts.

The District has received incentive funding for increasing instructional time as provided by the Incentives for Longer Instructional Day. This schedule presents information on the amount of instruction time offered by the District and whether the District complied with the provisions of Education Code Sections 46200 through 46206. The District neither met nor exceeded its target funding.

DEHESA SCHOOL DISTRICT
SCHEDULE OF FINANCIAL TRENDS AND ANALYSIS
YEAR ENDED JUNE 30, 2018

TABLE D-3

General Fund	Budget 2019 (See Note 1)	2018	2017	2016
Revenues and other financial sources	\$ 4,471,892	\$ 6,854,104	\$ 5,152,311	\$ 4,050,596
Expenditures, other uses and transfers out	4,395,625	5,028,937	5,091,157	4,099,157
Change in fund balance (deficit)	76,267	1,825,167	61,154	(48,561)
Ending fund balance	<u>\$ 2,371,562</u>	<u>\$ 2,295,295</u>	<u>\$ 470,128</u>	<u>\$ 408,974</u>
Available reserves (See Note 2)	<u>\$ 2,353,651</u>	<u>\$ 2,265,304</u>	<u>\$ 436,205</u>	<u>\$ 315,944</u>
Available reserves as a percentage of total outgo (see Note 3)	<u>53.5%</u>	<u>45.0%</u>	<u>8.6%</u>	<u>7.4%</u>
Total long-term debt	<u>\$ 4,975,646</u>	<u>\$ 5,013,082</u>	<u>\$ 5,001,627</u>	<u>\$ 4,987,115</u>
Average daily attendance at P-2	<u>136</u>	<u>132</u>	<u>144</u>	<u>174</u>

This schedule discloses the district's financial trends by displaying past years' data along with current year budget information. These financial trend disclosures are used to evaluate the district's ability to continue as a going concern for a reasonable period of time.

The general fund balance has increased by \$1,837,760 over the past three years. The fiscal year 2018-19 budget projects an increase of \$76,267. For a district this size, the state recommends available reserves of at least 5% of general fund expenditures, other uses and transfers out.

Long-term debt has increased by \$25,967 over the past two years.

Average daily attendance (ADA) has decreased by 42 over the past two years.

Notes:

- 1 Budget 2019 is included for analytical purposes only and has not been subjected to audit.
- 2 Available reserves consist of all unassigned fund balances, and all funds reserved for economic uncertainties contained within the General Fund.
- 3 On behalf payments of \$59,561, \$54,165, and \$66,913, have been excluded from the calculation of available reserves for the fiscal years ending June 30, 2018, 2017, and 2016.
- 4 As described in Note A to these financial statements, for purposes of reporting in conformity with GASB Statement No. 54, the District's Special Reserve Fund for Other Than Capital Outlay (Fund 17) and Special Reserve Fund for Postemployment Benefits (Fund 20) are included with the General Fund. The above Schedule of Financial Trends and Analysis contains only the financial information of the General Fund.

DEHESA SCHOOL DISTRICT
 RECONCILIATION OF ANNUAL FINANCIAL AND BUDGET
 REPORT WITH AUDITED FINANCIAL STATEMENTS
 YEAR ENDED JUNE 30, 2018

TABLE D-4

	<u>General Fund</u>	<u>Special Reserve Fund (17)</u>	<u>Special Reserve Fund (20)</u>
June 30, 2018 annual financial and budget report fund balances	\$ 2,295,295	\$ 1,619,852	\$ 770,084
Adjustments and reclassifications:			
Increasing (decreasing) the fund balance:			
GASB 54 required inclusion with general fund	<u>2,389,936</u>	<u>(1,619,852)</u>	<u>(770,084)</u>
Net adjustments and reclassifications	<u>2,389,936</u>	<u>(1,619,852)</u>	<u>(770,084)</u>
June 30, 2018, audited financial statement fund balances	<u>\$ 4,685,231</u>	<u>\$ -</u>	<u>\$ -</u>
	<u>Schedule of Long-Term Debt</u>		
June 30, 2018, annual financial and budget report total liabilities	\$ 7,653,289		
Adjustments and reclassifications:			
Increase (decrease) in total liabilities:			
General obligation bonds overstatement	(4,775)		
Total OPEB liability overstatement	(169,609)		
Other long-term liabilities understatement	<u>1,718</u>		
Net adjustments and reclassifications	<u>(172,666)</u>		
June 30, 2018, audited financial statement total liabilities	<u>\$ 7,480,623</u>		

This schedule provides the information necessary to reconcile the fund balances of all funds and the total liabilities balance of the general long-term debt account group as reported on the SACS report to the audited financial statements. Funds that required no adjustment are not presented.

DEHESA SCHOOL DISTRICT
 SCHEDULE OF CHARTER SCHOOLS
 YEAR ENDED JUNE 30, 2018

TABLE D-5

The following charter schools are chartered by Dehesa School District.

<u>Charter Schools</u>	<u>Included In Audit?</u>
Dehesa Charter School (#086)	No
Diego Hills Charter School (#146)	No
The Heights Charter School (#175)	No
Community Montessori Charter School (#177)	No
Valiant Charter School (#188)	No
Methods Charter School (#187)	No
Inspire Charter School-South (#202)	No
Diego Hills Central Charter (#213)	No
Pacific Coast Academy/Learning Latitudes (#212)	No
CA Academy of Sports Science (#1914)	No

Other Independent Auditor's Reports



P. Robert Wilkinson, CPA
Brian K. Hadley, CPA
Mark Bomediano, CPA

Aubrey W. Mann, CPA
Kevin A. Sproul, CPA

Independent Auditor's Report on Internal Control over Financial Reporting and On Compliance and Other Matters Based on an Audit of Financial Statements Performed In Accordance With Government Auditing Standards

Board of Trustees
Dehesa School District
El Cajon, California

Members of the Board of Trustees:

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the governmental activities, each major fund, and the aggregate remaining fund information of Dehesa School District, as of and for the year ended June 30, 2018, and the related notes to the financial statements, which collectively comprise Dehesa School District's basic financial statements, and have issued our report thereon dated December 17, 2018.

Internal Control Over Financial Reporting

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

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

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

Compliance and Other Matters

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

Purpose of this Report

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

William Apple King & Co. LLP

El Cajon, CA
December 17, 2018



P. Robert Wilkinson, CPA
Brian K. Hadley, CPA
Mark Bomediano, CPA

Aubrey W. Mann, CPA
Kevin A. Sproul, CPA

Independent Auditor's Report on State Compliance

Board of Trustees
Dehesa School District
El Cajon, California

Members of the Board of Trustees:

Report on State Compliance

We have audited the District's compliance with the types of compliance requirements described in the *2017-18 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, prescribed in Title 5, *California Code of Regulations*, Section 19810 that could have a direct and material effect on each of the District's state programs identified below for the fiscal year ended June 30, 2018.

Management's Responsibility for State Compliance

Management is responsible for compliance with the requirements of laws, regulations, contracts, and grants applicable to its state programs.

Auditor's Responsibility

Our responsibility is to express an opinion on compliance for each applicable program as identified in the State's audit guide, *2017-18 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting* prescribed in Title 5, *California Code of Regulations*, Section 19810. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States; and the State's audit guide, *2017-18 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, prescribed in Title 5, *California Code of Regulations*, Section 19810. Those standards and audit guide require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the compliance requirements referred to above that could have a direct and material effect on the state programs noted below occurred. An audit includes examining, on a test basis, evidence about the District's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances. We believe that our audit provides a reasonable basis for our opinion. Our audit does not provide a legal determination of the District's compliance with those requirements.

In connection with the audit referred to above, we selected and tested transactions and records to determine the District's compliance with the state laws and regulations applicable to the following items:

<u>Compliance Requirements</u>	<u>Procedures in Audit Guide Performed?</u>
LOCAL EDUCATION AGENCIES OTHER THAN CHARTER SCHOOLS:	
Attendance Accounting:	
Attendance Reporting	Yes
Teacher Certification and Misassignments	Yes
Kindergarten Continuance	Yes
Independent Study	N/A
Continuation Education	N/A
Instructional Time	Yes
Instructional Materials.....	Yes
Ratio of Administrative Employees to Teachers	Yes
Classroom Teacher Salaries	Yes
Early Retirement Incentive	N/A
GANN Limit Calculation	Yes
School Accountability Report Card	Yes
Juvenile Court Schools	N/A
Middle or Early College High Schools	N/A
K-3 Grade Span Adjustment	Yes
Transportation Maintenance of Effort	Yes
Apprenticeship: Related and Supplemental Instruction.....	N/A
SCHOOL DISTRICTS, COUNTY OFFICES OF EDUCATION, AND CHARTER SCHOOLS:	
Educator Effectiveness	Yes
California Clean Energy Jobs Act	Yes
After School Education and Safety Program:	
After School	N/A
Before School	N/A
General Requirements	N/A
Proper Expenditure of Education Protection Account Funds	Yes
Unduplicated Local Control Funding Formula Pupil Counts	Yes
Local Control and Accountability Plan	Yes
Independent Study-Course Based	N/A
CHARTER SCHOOLS:	
Attendance	N/A
Mode of Instruction	N/A
Nonclassroom-Based Instruction/Independent Study.....	N/A
Determination of Funding for Nonclassroom-Based Instruction	N/A
Annual Instructional Minutes - Classroom Based	N/A
Charter School Facility Grant Program	N/A

The term "N/A" is used above to mean either the District did not offer the program during the current fiscal year or the program applies to a different type of local education agency.

Opinion on State Compliance

In our opinion, Dehesa School District complied, in all material respects, with the compliance requirements referred to above that are applicable to the statutory requirements listed in the schedule above for the year ended June 30, 2018.

Purpose of This Report

The purpose of this report is solely to describe the scope of our testing of compliance and the results of that testing, and not to provide an opinion of the effectiveness of the entity's internal control or on compliance outside of the items tested as noted above. This report is an integral part of an audit performed in accordance with the *2017-18 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting* prescribed in Title 5, *California Code of Regulations*, Section 19810 in considering the entity's compliance. Accordingly, this communication is not suitable for any other purpose.

William Arvelly King & Co., LLP

El Cajon, CA
December 17, 2018

Findings and Recommendations Section

DEHESA SCHOOL DISTRICT
SCHEDULE OF FINDINGS AND QUESTIONED COSTS
FOR THE YEAR ENDED JUNE 30, 2018

A. Summary of Auditor's Results

1. Financial Statements

Type of auditor's report issued: Unmodified

Internal control over financial reporting:

One or more material weaknesses identified? Yes No

One or more significant deficiencies identified that are not considered to be material weaknesses? Yes None Reported

Noncompliance material to financial statements noted? Yes No

2. Federal Awards

Internal control over major programs:

One or more material weaknesses identified? Yes Not Applicable

One or more significant deficiencies identified that are not considered to be material weaknesses? Yes Not Applicable

Type of auditor's report issued on compliance for major programs: Not Applicable

Any audit findings disclosed that are required to be reported in accordance with Title 2 U.S. Code of Federal Regulations (CFR) Part 200? Yes Not Applicable

Identification of major programs:

<u>CFDA Number(s)</u>	<u>Name of Federal Program or Cluster</u>
Not Applicable	Not Applicable

Dollar threshold used to distinguish between type A and type B programs: \$750,000

Auditee qualified as low-risk auditee? Yes Not Applicable

DEHESA SCHOOL DISTRICT
SCHEDULE OF FINDINGS AND QUESTIONED COSTS
FOR THE YEAR ENDED JUNE 30, 2018

3. State Awards

Any audit findings disclosed that are required to be reported in accordance with the state's Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting? _____ Yes X No

Type of auditor's report issued on compliance for state programs: Unmodified

A. Financial Statement Findings

None

A. Federal Award Findings and Questioned Costs

Not Applicable

C. State Award Findings and Questioned Costs

None

DEHESA SCHOOL DISTRICT
SUMMARY SCHEDULE OF PRIOR AUDIT FINDINGS
FOR THE YEAR ENDED JUNE 30, 2018

<u>Finding/Recommendation</u>	<u>Current Status</u>	<u>Management's Explanation If Not Implemented</u>
There were no findings reported in the June 30, 2017 audit report.		

DEHESA SCHOOL DISTRICT

To: Members of the Board
From: Nancy Hauer
Subject: Updated Board Policies,
Regulations and Exhibits
4131-4161.5 Personnel

Meeting Date: January 15, 2019

- Action
- First Reading
- Information
- Presentation
- Discussion
- Public Hearing
- Roll Call Vote Required

Background: Our current Board policies have not been updated since June of 2003. The District worked with CSBA to update all of our policies. When each section is completed the Board will be presented a section for review and approval.

Report:

As you are aware, every Board member has taken a section of policy to review. There are a quite a few policies, regulations and exhibits in this section. This is our final section for review before we can send them all to CSBA for compilation. Karen Kirkpatrick and I are working on completing them as soon as possible. Thank you everyone for your diligence and hard work on completing this arduous task. My goal is to have this section finalized completely by the February meeting, if not sooner.

Financial Impact: None

Student Impact: Effective governance has a positive impact on student achievement.

Recommendation: Administration recommends approval of the new 4000's Board Policies, Regulations and Exhibits.

Agenda Item #:VII.E.1

Board Policy

Staff Development

BP 4131

Personnel

The Governing Board believes that, in order to maximize student learning and achievement, certificated staff members must be continuously learning and improving their skills. The Superintendent or designee shall develop a program of ongoing professional development which includes opportunities for teachers to enhance their instructional and classroom management skills and become informed about changes in pedagogy and subject matter.

(cf. 6111 - School Calendar)

The Superintendent or designee shall involve teachers, site and district administrators, and others, as appropriate, in the development of the district's staff development program. He/she shall ensure that the district's staff development program is aligned with district priorities for student achievement, school improvement objectives, the local control and accountability plan, and other district and school plans.

(cf. 0000 - Vision)

(cf. 0200 - Goals for the School District)

(cf. 0420 - School Plans/Site Councils)

(cf. 0460 - Local Control and Accountability Plan)

The district's staff development program shall assist certificated staff in developing knowledge and skills, including, but not limited to:

1. Mastery of subject-matter knowledge, including current state and district academic standards

(cf. 6011 - Academic Standards)

(cf. 6142.1 - Sexual Health and HIV/AIDS Prevention Instruction)

(cf. 6142.2 - World/Foreign Language Instruction)

(cf. 6142.3 - Civic Education)

(cf. 6142.5 - Environmental Education)

(cf. 6142.6 - Visual and Performing Arts Education)

(cf. 6142.7 - Physical Education and Activity)

(cf. 6142.8 - Comprehensive Health Education)

(cf. 6142.91 - Reading/Language Arts Instruction)

(cf. 6142.92 - Mathematics Instruction)

(cf. 6142.93 - Science Instruction)

(cf. 6142.94 - History-Social Science Instruction)

2. Use of effective, subject-specific teaching methods, strategies, and skills

3. Use of technologies to enhance instruction

(cf. 0440 - District Technology Plan)
(cf. 4040 - Employee Use of Technology)
(cf. 6163.4 - Student Use of Technology)

4. Sensitivity to and ability to meet the needs of diverse student populations, including, but not limited to, students of various racial and ethnic groups, students with disabilities, English learners, economically disadvantaged students, foster youth, gifted and talented students, and at-risk students

(cf. 4112.22 - Staff Teaching English Learners)
(cf. 4112.23 - Special Education Staff)
(cf. 5147 - Dropout Prevention)
(cf. 6141.5 - Advanced Placement)
(cf. 6171 - Title I Programs)
(cf. 6172 - Gifted and Talented Student Program)
(cf. 6173 - Education for Homeless Children)
(cf. 6173.1 - Education for Foster Youth)
(cf. 6174 - Education for English Learners)
(cf. 6175 - Migrant Education Program)

5. Understanding of how academic and career technical instruction can be integrated and implemented to increase student learning

(cf. 6178 - Career Technical Education)

6. Knowledge of strategies that encourage parents/guardians to participate fully and effectively in their children's education

(cf. 1240 - Volunteer Assistance)
(cf. 5020 - Parent Rights and Responsibilities)
(cf. 6020 - Parent Involvement)

7. Effective classroom management skills and strategies for establishing a climate that promotes respect, fairness, tolerance, and discipline, including conflict resolution and hatred prevention

(cf. 5131 - Conduct)
(cf. 5131.2 - Bullying)
(cf. 5137 - Positive School Climate)
(cf. 5138 - Conflict Resolution/Peer Mediation)
(cf. 5145.9 - Hate-Motivated Behavior)

8. Ability to relate to students, understand their various stages of growth and development, and motivate them to learn

9. Ability to interpret and use data and assessment results to guide instruction

(cf. 5121 - Grades/Evaluation of Student Achievement)

(cf. 6162.5 - Student Assessment)

10. Knowledge of topics related to student health, safety, and welfare

(cf. 0450 - Comprehensive Safety Plan)

(cf. 5030 - Student Wellness)

(cf. 5131.6 - Alcohol and Other Drugs)

(cf. 5131.63 - Steroids)

(cf. 5141.21 - Administering Medication and Monitoring Health Conditions)

(cf. 5141.4 - Child Abuse Prevention and Reporting)

(cf. 5141.52 - Suicide Prevention)

(cf. 5145.3 - Nondiscrimination/Harassment)

(cf. 5145.7 - Sexual Harassment)

11. Knowledge of topics related to employee health, safety, and security

(cf. 3514.1 - Hazardous Substances)

(cf. 4119.11/4219.11/4319.11 - Sexual Harassment)

(cf. 4119.42/4219.42/4319.42- Exposure Control Plan for Bloodborne Pathogens)

(cf. 4119.43/4219.43/4319.43 - Universal Precautions)

(cf. 4157/4257/4357 - Employee Safety)

(cf. 4158/4258/4358 - Employee Security)

The Superintendent or designee shall, in conjunction with teachers, interns, and administrators, as appropriate, develop an individualized program of professional growth to increase competence, performance, and effectiveness in teaching and classroom management and, as necessary, to assist them in meeting state or federal requirements to be fully qualified for their positions.

(cf. 4112.2 - Certification)

(cf. 4112.21 - Interns)

(cf. 4131.1 - Teacher Support and Guidance)

Professional learning opportunities offered by the district shall be evaluated based on the criteria specified in Education Code 44277. Such opportunities may be part of a coherent plan that combines school activities within a school, including lesson study or co-teaching, and external learning opportunities that are related to academic subjects taught, provide time to meet and work with other teachers, and support instruction and student learning. Learning activities may include, but are not limited to, mentoring projects for new teachers, extra support for teachers to improve practice, and collaboration time for teachers to develop new instructional lessons, select or develop common formative assessments, or analyze student data. (Education Code 44277)

The district's staff evaluation process may be used to recommend additional individualized staff development for individual employees.

(cf. 4115 - Evaluation/Supervision)

The Board may budget funds for actual and reasonable expenses incurred by staff who participate in staff development activities.

(cf. 3100 - Budget)

(cf. 3350 - Travel Expenses)

The Superintendent or designee shall provide a means for continual evaluation of the benefit of staff development activities to both staff and students and shall regularly report to the Board regarding the effectiveness of the staff development program. Based on the Superintendent's report, the Board may revise the program as necessary to ensure that the staff development program supports the district's priorities for student achievement.

(cf. 0500 - Accountability)

Legal Reference:

EDUCATION CODE

44032 Travel expense payment

44259.5 Standards for teacher preparation

44277 Professional growth programs for individual teachers

44300 Emergency permits

44325-44328 District interns

44450-44468 University internship program

44570-44578 Inservice training, secondary education

44830.3 District interns

45028 Salary schedule and exceptions

48980 Notification of parents/guardians; schedule of minimum days

52060-52077 Local control and accountability plan

56240-56245 Staff development; service to persons with disabilities

99200-99206 Subject matter projects

GOVERNMENT CODE

3543.2 Scope of representation of employee organization

CODE OF REGULATIONS, TITLE 5

13025-13044 Professional development and program improvement

80021 Short-term staff permit

80021.1 Provisional internship permit

80023-80026.6 Emergency permits

UNITED STATES CODE, TITLE 20

6601-6702 Preparing, Training and Recruiting High Quality Teachers and Principals

PUBLIC EMPLOYMENT RELATIONS BOARD DECISIONS

United Faculty of Contra Costa Community College District v. Contra Costa Community College District, (1990) PERB Order No. 804, 14 PERC P21, 085

Management Resources:

CSBA PUBLICATIONS

Governing to the Core: Professional Development for Common Core, Governance Brief, May 2013

COMMISSION ON TEACHER CREDENTIALING PUBLICATIONS

California Standards for the Teaching Profession, 2009

WEB SITES

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

California Department of Education, Professional Learning: <http://www.cde.ca.gov/pd>

California Subject Matter Projects: <http://csmp.ucop.edu>

Commission on Teacher Credentialing: <http://www.ctc.ca.gov>

(11/08 12/13) 7/15

Policy
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

AGREEMENT FOR SPECIAL SERVICES

I. PARTIES

This Agreement for Special Services (the "Agreement") is made this 1st day of December, 2018, between the law firm of ATKINSON, ANDELSON, LOYA, RUUD & ROMO, a Professional Law Corporation, hereinafter referred to as the "Law Firm," and DEHESA SCHOOL DISTRICT, hereinafter referred to as "District."

II. RECITALS; PURPOSE; MATTERS

The District desires to retain and engage the Law Firm to perform legal and, upon request, non-legal consultant services on the District's behalf, and the Law Firm is willing to accept said engagement on the terms and conditions contained in this Agreement. The Law Firm agrees to provide such services to the District, including representation in administrative and court proceedings, as requested by the District. The place and time for such services are to be designated by the Superintendent of the District or designee.

III. TERMS AND CONDITIONS

A. The term of this Agreement shall be December 1, 2018, through November 30, 2019. For the period December 1, 2018, through November 30, 2019, the District hereby agrees to pay the Law Firm in connection with the above-referenced services as authorized at the following hourly rates:

Senior Partners	\$270.00
Partners/Senior Counsel	\$255.00
Senior Associates	\$240.00
Associates	\$235.00
Electronic Technology Litigation Specialist	\$220.00
Non-Legal Consultants	\$200.00
Senior Paralegals/Law Clerks	\$155.00
Paralegals/Legal Assistants	\$150.00

The Law Firm shall bill in quarter-hour increments. A fixed rate may be established for specially identified projects, subject to prior approval by the District.

B. In addition, the District hereby agrees to pay a 5% per month administrative charge calculated and based on monthly fees billed to cover related operational expenses incurred by the Law Firm. This administrative fee is in lieu of charging the District for Westlaw,

photocopies, automobile mileage, parking, facsimiles, telephone, document preparation, and postage. This does not include items listed in paragraph D below.

C. The Law Firm may charge the full hourly rate to more than one client for services provided concurrently during the same time period. For example, in the course of traveling to the District or while providing legal services at the District, it may be necessary for the Law Firm to provide billable services to other clients.

D. The Law Firm shall not be obligated to advance costs on behalf of the District; however, for purposes of convenience and in order to expedite matters, the Law Firm reserves the right to advance costs on behalf of the District with the Superintendent's or designee's prior approval in the event a particular cost item exceeds \$2,000.00 in amount, and without the prior approval of the District in the event a particular cost item totals \$2,000.00 or less. Typical cost advances include, but are not limited to, messenger fees, travel costs, bonds, witness fees, overnight delivery, deposition and court reporter fees, transcript costs, expert witness fees, investigative fees, etc. If the Law Firm retains, with authorization from the District, experts or consultants for the benefit of the District, rather than the District contracting directly with any expert or consultant, it is agreed that the District shall pay a five percent (5%) fee ("consultant processing fee") on such expert and consultant costs paid by the Law Firm in order to offset certain costs to the Law Firm resulting from administering and initially paying such expert and consultant fees on behalf of the District.

E. A detailed description of the attorney work performed and the costs advanced by the Law Firm will be prepared on a monthly basis as of the last day of the month and will be mailed to the District on or about the 15th of the following month. Payment of the full amount due, as reflected on the monthly statements, will be due to the Law Firm from the District by the 10th of each month, unless other arrangements are made. In the event there are retainer funds of the District in the Law Firm's Trust account at the time a monthly billing statement is prepared, funds will be transferred from the Law Firm's Trust Account to the Law Firm's General Account to the extent of the balance due on the monthly statement and a credit therefor will be reflected on the monthly statement. Any balance of fees or costs advanced remaining unpaid for a period of 30 days will be subject to a 1% per month service charge.

F. The District agrees to review the Law Firm's monthly statements promptly upon receipt and to notify the Law Firm, in writing, with respect to any disagreement with the monthly statement. Failure to communicate written disagreement with the Law Firm's monthly statement within thirty (30) days of the District's receipt thereof shall be deemed to signify the District's agreement that the monthly billing statement accurately reflects: (a) the legal services performed; and (b) the proper charge for those legal services.

G. The District agrees to fully cooperate with the Law Firm in connection with the Law Firm's representation of the District including, but not limited to, attending mandatory court hearings and other appearances and providing necessary information and documentation to enable the Law Firm to adequately represent the District.

H. The District has the right, at any time, and either with or without good cause, to discharge the Law Firm as the District's attorneys. In the event of such a discharge of the Law

Firm by the District, however, any and all unpaid attorneys' fees and costs owing to the Law Firm from the District shall be immediately due and payable.

I. The Law Firm reserves the right to discontinue the performance of legal services on behalf of the District upon the occurrence of any one or more of the following events:

1. Upon order of Court requiring the Law Firm to discontinue the performance of said legal services;

2. Upon a determination by the Law Firm in the exercise of its reasonable and sole discretion, that state or federal legal ethical principles require it to discontinue legal services for the District;

3. Upon the failure of the District to perform any of the District's obligations hereunder with respect to the payment of the Law Firm's fees and costs advanced; or

4. Upon the failure of the District to perform any of the District's obligations hereunder with respect to cooperation with the Law Firm in connection with the Law Firm's representation of the District.

J. In the event that the Law Firm ceases to perform legal services for the District as hereinabove provided, the District agrees that it will promptly pay to the Law Firm any and all unpaid fees or costs advanced, and retrieve all of its files, signing a receipt therefor. Further, the District agrees that, with respect to any litigation where the Law Firm has made an appearance in Court on its behalf, the District will promptly execute an appropriate Substitution of Attorney form.

K. The Law Firm maintains errors and omissions insurance coverage applicable to the services to be rendered.

L. It is understood and agreed that the Law Firm, while engaged in carrying out and complying with any of the terms and conditions of this Agreement, is an independent contractor and is not an employee of the District.

IV. SPECIALIZED LEGAL SERVICES

For specialized litigation and transactional services in the areas of construction, procurement, technology, prevailing wage, real property, intellectual property, CEQA, mitigation negotiations, school and college finance, tax, bankruptcy, copyright, trademark, non-profit organizations, immigration, and appellate law, the District agrees to pay the Law Firm at rates higher than the standard hourly rates for special projects or particular scopes of work. The Law Firm shall inform the District of the rates for specialized services and the Superintendent or designee shall agree to such rates in writing prior to any billings for specialized legal services by the Law Firm.

V. RELATED POST-INVESTIGATION SERVICES

If an attorney who conducted an investigation for the District is subsequently asked or required to prepare for and/or testify, including, without limitation, at deposition, trial, arbitration or any other proceeding, because of services rendered under this Agreement, and/or if the investigating attorney must respond to subpoenas or discovery or otherwise respond or perform services with respect to any matter relating to or arising out of services performed for the District, the District agrees to pay the Law Firm for all time expended (including preparation time) at the investigating attorney's then current regular hourly rate and to reimburse the Law Firm for reasonable costs and expenses incurred.

VI. CONSENT TO JOINT REPRESENTATION

The District acknowledges that from time to time Law Firm may be asked to perform legal services on a matter affecting two or more public education local agencies. In such situations before proceeding with representation, Law Firm shall provide the District with a written disclosure of the relevant circumstances and of the actual and reasonably foreseeable adverse consequences to the District, and shall seek separate written consent to joint representation from all involved parties if permissible according to ethical principles applicable to attorneys. The District acknowledges that it is often in the best interest of the District for such representation to commence without undue delay which may result from waiting until a regularly-scheduled Board meeting. Therefore, the Governing Board of the District hereby delegates to the Superintendent or designee authority to consent to joint representation in the circumstances described in this paragraph, and to execute such written consent on behalf of the Board and District.

VII. SERVICES PERFORMED BY LAW FIRM-PROVIDED NON-LEGAL CONSULTANTS

The Law Firm has an affiliation with non-legal education consultants who are available to assist the District in areas including, but not limited to, personnel/business office audits, human resources/collective bargaining consultation, public/employee relations surveys and communications, media and public relations, budget analysis/support services, instructional coaching/counseling at school improvement sites, special education, student discipline, leadership coaching, board/superintendent relations and best practices, and interim management placement.

Because the Law Firm has a financial interest in the District's use of these affiliated non-legal consultants, the rules of the State Bar of California require that the District provide its informed written consent to this arrangement prior to utilizing these services. Execution of this Agreement shall be deemed "informed consent" for the purposes of this paragraph. The District is hereby advised that it may seek the advice of an independent attorney of its choice prior to providing such written consent.

Please also be advised that because the services of these non-legal consultants are provided to the District outside of the attorney-client relationship, communications with these non-legal consultants will not be protected from disclosure by the attorney-client privilege.

VIII. CONSENT TO LAW FIRM COMMUNICATION

As part of our commitment to client service, the Law Firm will send the District periodic alerts on case developments and legislative changes, and notices of Breakfast Briefings, conferences, and other training opportunities designed to help the District with daily legal concerns. The Law Firm will send those and other additional service notices to the District via regular mail and/or electronic mail at the email address which you designate or the email used in your daily communications with us. These email notices are a convenient way to keep the District administrators apprised of important legal changes. By execution of this Agreement, the District and designated contact(s) consent to receive such communications by electronic mail subject to the right to unsubscribe at any time.

IX. BINDING ARBITRATION

If any dispute arises out of, or related to, a claimed breach of this Agreement, the professional services rendered by attorneys, or any other disagreement of any nature, type, or description, regardless of the facts or the legal theories which may be involved, including attorney malpractice, such dispute shall be resolved by binding arbitration by a single arbitrator. Each side will bear its own costs and attorney fees. The parties agree to waive their right to a jury and to an appeal.

X. DURATION

This Agreement shall be effective December 1, 2018, through November 30, 2019, and thereafter shall continue from month-to-month at the then current hourly rate set forth herein until modified in writing by mutual agreement or terminated by either party upon thirty (30) days' written notice.

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XI. EXECUTION DATE

This Agreement is entered into this ____ day of December, 2018.

“Law Firm”

ATKINSON, ANDELSON, LOYA, RUUD & ROMO

Dated: _____

By: _____
MARK R. BRESEE

“District”

DEHESA SCHOOL DISTRICT

Dated: _____

By: _____

Board Policy

Teacher Support And Guidance

BP 4131.1

Personnel

The Governing Board recognizes the link between teacher effectiveness and student learning and desires to provide structured, individualized support and guidance to teachers as necessary to enhance their performance and support teacher retention. The Superintendent or designee shall develop a program of intensive professional development and consultation to help interns and beginning teachers apply their academic preparation more effectively in the classroom and to assist other teachers who need additional development in subject matter knowledge, instructional methods, and/or classroom management.

(cf. 4112.21 - Interns)

The Superintendent or designee shall coordinate individualized teacher support and guidance activities developed pursuant to this policy with other district staff development programs and staff evaluation processes.

(cf. 4115 - Evaluation/Supervision)

(cf. 4131 - Staff Development)

Teachers may volunteer to participate in a teacher support and guidance program or may be referred to such services based on their performance evaluation.

Support providers shall be experienced certificated personnel who are knowledgeable about teacher development and needed competencies and have strong interpersonal and communication skills. Support may include, but is not limited to, classroom observations, regular meetings with the support provider, and an individualized plan for professional development or coursework that takes into consideration the teacher's assignment and prior preparation and experience. The roles and responsibilities of support providers shall be clearly defined in writing and communicated to all participants.

The Superintendent or designee shall ensure the timely assignment of qualified support providers to participating teachers and for reassignment as needed. He/she shall also ensure that each support provider receives appropriate training to serve in a support capacity and is provided adequate time and resources to assist other teachers.

The district may provide a stipend to support providers in accordance with the collective bargaining agreement and district budget.

(cf. 3100 - Budget)

(cf. 4141/4241 - Collective Bargaining Agreement)

The performance of a participating teacher shall be monitored by the support provider,

Superintendent or designee, and/or a panel of teachers and administrators in order to determine whether the teacher has met program goals and to make recommendations for follow-up support or employment action, as appropriate.

(cf. 4112.6/4212.6/4312.6 - Personnel Files)
(cf. 4117.6 - Decision Not to Rehire)
(cf. 4118 - Dismissal/Suspension/Disciplinary Action)

The Superintendent or designee shall regularly evaluate the district's teacher support and guidance programs and shall report to the Board regarding program effectiveness in meeting district goals for teacher quality and retention. Evaluation reports may include, but are not limited to, data on program enrollment and completion, subsequent retention rates of participating teachers, and interviews or surveys of program participants.

(cf. 0500 - Accountability)

Beginning Teacher Induction Program

The Superintendent or designee shall inform beginning teachers who possess a preliminary credential about induction programs or other options that are available to help them fulfill the requirements of the clear multiple subject, single subject, or education specialist credential pursuant to Education Code 44259.

(cf. 4112.2 - Certification)

Legal Reference:

EDUCATION CODE

44259 Credential requirements

44259.5 Standards for professional preparation programs

44275.4 Credential requirements, induction, out-of-state teachers

44325-44328 District interns

44450-44468 University interns

44830.3 Interns, professional development and guidance

CODE OF REGULATIONS, TITLE 5

80021 Short-term staff permit

80021.1 Provisional internship permit

80026.5 Orientation, guidance, and assistance for emergency permit holders

80033 Intern teaching credential

80055 Intern credential

80413 Credential requirements

80413.3 Credential requirements; teachers with out-of-state credentials

UNITED STATES CODE, TITLE 20

6601-6702 Preparing, training and recruiting high quality teachers and principals

Management Resources:

COMMISSION ON TEACHER CREDENTIALING PUBLICATIONS

SB 2042 Multiple Subject and Single Subject Preliminary Credential Program Standards, rev. February 2014

Intern Preservice, Support and Supervision Requirements: Preparation to Teach English Learners, Program Sponsor Alert 13-06, June 3, 2013

Education Specialist Teaching and Other Related Services Credential Program Standards, rev. May 2013

Multiple and Single Subject Induction Programs (program standards, preconditions, and language addressing the teaching of English learners), rev. January 2013

California Standards for the Teaching Profession, October 2009

WEB SITES

California Department of Education: <http://www.cde.ca.gov>

California Federation of Teachers: <http://www.cft.org>

California Teachers Association: <http://www.cta.org>

Commission on Teacher Credentialing: <http://www.ctc.ca.gov>

8/14

Policy
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Administrative Regulation

Teacher Support And Guidance

AR 4131.1
Personnel

Selection of Support Providers

The Superintendent or designee shall design a written application for certificated personnel who want to be mentor teachers or support providers.

Any employee designated by the Superintendent or designee as a support provider shall, at a minimum, meet the following qualifications:

1. Possess a clear credential

(cf. 4112.2 - Certification)

2. Have at least three years of full-time teaching experience

3. Have demonstrated effective communication skills, subject matter knowledge, and mastery of a range of teaching strategies necessary to meet the needs of students

The Superintendent or designee shall make the final selection of support providers and shall assign support providers to participating teachers. To the extent possible, the assigned support provider shall be one who teaches at the same school, the same grade levels, and/or in the same subject matter as the teacher(s) to whom he/she is assigned. No support provider shall be assigned to more than five teachers during a school year.

(cf. 4113 - Assignment)

The Superintendent or designee shall regularly evaluate the effectiveness of the support provider and may reassign or revoke his/her designation as a support provider.

Peer Review Panel

The Superintendent or designee shall establish a peer review program to provide struggling teachers with feedback and guidance. When a teacher volunteers to participate or is referred by the principal due to unsatisfactory performance, written performance goals shall be established which are aligned with student learning and teacher evaluation criteria. The teacher shall be assigned a consulting teacher who shall provide assistance and review through multiple observations of the teacher during periods of classroom instruction. In addition, the teacher shall participate in sufficient professional development activities to assist him/her to improve teaching skills and knowledge. The consulting teacher shall maintain a written record of the teacher's activities and performance and shall regularly communicate with the principal regarding the teacher's progress.

(cf. 4115 - Evaluation/Supervision)

The Superintendent or designee shall establish a joint teacher-administrator peer review panel composed of a majority of teachers selected by other teachers, with the remainder consisting of administrators selected by the Superintendent or designee. The joint teacher-administrator peer review panel shall review reports prepared by the consulting teacher and shall make recommendations to the Superintendent or designee as to whether the participating teacher should be exited from the program due to satisfactory improvement, remain in the program because he/she would possibly benefit from additional support from the program, or be recommended for dismissal.

(cf. 4118 - Dismissal/Suspension/Disciplinary Action)

8/14

Board Policy

Publication Or Creation Of Materials

BP 4132 4232, 4332

Personnel

The Governing Board recognizes the importance of creating a work environment that encourages employee innovation in creating and developing high-quality materials to improve student achievement and the efficiency of district operations.

(cf. 4119.21/4219.21/4319.21 - Professional Standards)

(cf. 6162.6 - Use of Copyrighted Materials)

The Superintendent or designee shall oversee the development of instructional materials, computer programs, and other copyrightable materials by employees, independent contractors, and consultants. An employee, independent contractor, or consultant shall notify the Superintendent or designee of his/her intent to publish or register a work developed in whole or in part within the scope of his/her employment.

(cf. 3600 - Consultants)

Instructional materials, computer programs, and other copyrightable materials developed by an employee within the scope of his/her employment shall be the property of the district.

(cf. 1113 - District and School Web Sites)

(cf. 4040 - Employee Use of Technology)

(cf. 4119.1/4219.1/4319.1 - Civil and Legal Rights)

(cf. 6161.11 - Supplementary Instructional Materials)

(cf. 6163.1 - Library Media Centers)

If an employee has developed copyrightable material during both work and non-working hours, and the work was within the scope of his/her employment, the Superintendent or designee shall negotiate a contract with the employee to protect the district's right as to the ownership or partial ownership of the copyright.

(cf. 3312 - Contracts)

The Superintendent or designee shall ensure that any contract with an independent contractor or consultant contains a provision specifying the district's right to ownership of the copyright of any work produced by the contractor or consultant for the district.

The Superintendent or designee may secure copyrights in the name of the district for all copyrightable works developed by the district. All royalties or revenues from these copyrights shall be used for the benefit of the district. (Education Code 35170)

Legal Reference:

EDUCATION CODE

32360 Copyrights; use of funds

32361 Copyrights; use of employee work time

35170 Authority to secure copyrights

35182 Marketing or licensing noneducational mainframe electronic data-processing software

60076 Royalties or other compensation

LABOR CODE

2870-2872 Inventions made by an employee

UNITED STATES CODE, TITLE 17

101-122 Subject matter and scope of copyright

201 Copyright ownership and transfer

COURT DECISIONS

Community for Creative Non-Violence v. Reid, (1989) 490 U.S. 730

Management Resources:

WEB SITES

Copyright Clearance Center: <http://www.copyright.com>

Copyright Society of the USA: <http://www.csusa.org>

U.S. Copyright Office: <http://www.copyright.gov>

(1/85 12/89) 7/08

Policy
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Board Policy

Soliciting And Selling

BP 4135 4235, 4335

Personnel

Employees shall not solicit district staff, students or their families with the intent to sell general merchandise, books, equipment or services for their own personal profit or benefit. Solicitation of students and staff on behalf of the school or other charitable organizations shall be conducted in accordance with applicable Board policy and administrative regulation.

- (cf. 1325 - Advertising and Promotion)
- (cf. 1321 - Solicitation of Funds from and by Students)
- (cf. 4136/4236/4336 - Nonschool Employment)
- (cf. 5022 - Student and Family Privacy Rights)

Staff members shall respect the confidentiality of district employees and students and shall not use their status as district employees to secure information such as names, addresses, e-mail addresses, and telephone numbers for solicitations or use in personal profit-making or beneficial ventures.

- (cf. 5125.1 - Release of Directory Information)

Educational tours may be promoted on school premises only if they are sponsored by the district. Employees engaged in planning, organizing or leading tours as private, non-district-sponsored businesses shall make it clear that they do not represent the school or district. All activities related to such tours must be carried on outside of school hours and off school premises.

- (cf. 3312.2 - Educational Travel Program Contracts)

Staff participation in "flower funds," "anniversary funds" or other similar funds shall be voluntary.

Legal Reference:
EDUCATION CODE
51520 Prohibited solicitations on school premises

(9/88) 7/03

Policy
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Board Policy

Nonschool Employment

BP 4136 4236,4336

Personnel

In order to help maintain public trust in the integrity of district operations, the Governing Board expects all employees to give the responsibility of their positions precedence over any other outside employment. A district employee may receive compensation for outside activities as long as these activities are not inconsistent, incompatible, in conflict with, or inimical to his/her district duties.

(cf. 4119.21/4219.21/4319.21 - Professional Standards)

(cf. 4119.23/4219.23/4319.23 - Unauthorized Release of Confidential/Privileged Information)

(cf. 9270 - Conflict of Interest)

An outside activity shall be considered inconsistent, incompatible, or inimical to district employment when such activity: (Government Code 1126)

1. Requires time periods that interfere with the proper, efficient discharge of the employee's duties
2. Entails compensation from an outside source for activities which are part of the employee's regular duties
3. Involves using the district's name, prestige, time, facilities, equipment, or supplies for private gain
4. Involves service which will be wholly or in part subject to the approval or control of another district employee or Board member

(cf. 1321 - Solicitation of Funds from and by Students)

(cf. 3300 - Expenditures and Purchases)

(cf. 4040 - Employee Use of Technology)

(cf. 4132/4232/4332 - Publication or Creation of Materials)

(cf. 4135/4235/4335 - Soliciting and Selling)

(cf. 6161.1 - Selection and Evaluation of Instructional Materials)

An employee wishing to accept outside employment that may be inconsistent, incompatible, in conflict with, or inimical to the employee's duties shall file a written request with his/her immediate supervisor describing the nature of the employment and the time required. The supervisor shall evaluate each request based on the employee's specific duties within the district and determine whether to grant authorization for such employment.

(cf. 4112.9/4212.9/4312.9 - Employee Notifications)

The supervisor shall inform the employee whether the outside employment is prohibited. The employee may appeal a supervisor's denial of authorization to the Superintendent or designee. An employee who continues to pursue a prohibited activity may be subject to disciplinary action.

(cf. 4118 - Dismissal/Suspension/Disciplinary Action)
(cf. 4119.1/4219.1/4319.1 - Civil and Legal Rights)
(cf. 4144/4244/4344 - Complaints)
(cf. 4218 - Dismissal/Suspension/Disciplinary Action)

Tutoring

A certificated employee shall not accept any compensation or other benefit for tutoring a student enrolled in his/her class(es). An employee who wishes to tutor another district student shall first request authorization from his/her supervisor in accordance with this Board policy. If authorization is granted, the employee shall not use district facilities, equipment, or supplies when providing the tutoring service.

Legal Reference:

EDUCATION CODE

35160 Authority of governing boards
35160.1 Broad authority of school districts
51520 Prohibited solicitation on school premises

GOVERNMENT CODE

1126 Incompatible activities of employees
1127 Incompatible activities; off duty work
1128 Incompatible activities, attorney

CODE OF REGULATIONS, TITLE 5

80334 Unauthorized private gain or advantage

ATTORNEY GENERAL OPINIONS

70 Ops.Cal.Atty.Gen. 157 (1987)

Management Resources:

WEB SITES

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

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

(9/91) 7/08

Policy
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Board Policy

Bargaining Units

BP 4140 4240,4340

Personnel

The Governing Board recognizes the right of district employees to form a bargaining unit, select an employee organization as their exclusive representative, and be represented by that organization in their employment relationship with the district. The Board is committed to negotiating in good faith with recognized employee organizations and respecting the rights of employees and employee organizations.

(cf. 4141/4241 - Collective Bargaining Agreement)

(cf. 4143/4243 - Negotiations/Consultation)

(cf. 9000 - Role of the Board)

The district shall not dominate or interfere with the formation or administration of any employee organization or contribute financial or other support to it. (Government Code 3543.5)

Formation of Bargaining Units

Certificated and classified employees shall not be included in the same bargaining unit. (Government Code 3545)

The district may recognize a bargaining unit of supervisory employees if: (Government Code 3545)

1. The bargaining unit includes all supervisory employees.
2. The supervisors are not represented by the same organization that represents employees whom the supervisory employees supervise.

(cf. 4300 - Administrative and Supervisory Personnel)

(cf. 4301 - Administrative Staff Organization)

(cf. 4312.1 - Contracts)

For this purpose, supervisory employee means any employee, regardless of job description, having the authority, in the interest of the district, to hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward, discipline, assign work, direct, adjust grievance of other employees, or effectively recommend that action. The exercise of this authority shall not be merely routine or clerical in nature, but shall require the use of independent judgment.

(Government Code 3540.1)

Employees serving in management, senior management, or confidential positions shall not be represented by an exclusive representative. Such employees may represent themselves individually or may be represented by an employee organization whose membership is composed

entirely of employees designated as holding those positions. When represented by an employee organization, that organization shall not meet and negotiate with the district. For this purpose: (Government Code 3540.1, 3543.4)

1. Management employee means any employee who has significant responsibilities for formulating district policies or administering district programs, and whose position is designated as a management position by the Board.
2. Confidential employee means any employee who is required to develop or present management positions with respect to employer-employee relations or whose duties normally require access to confidential information that is used to contribute significantly to the development of management positions.

Membership

The district shall not deter or discourage employees or job applicants from becoming or remaining members of an employee organization, authorizing representation by an employee organization, or authorizing dues or fee deductions to an employee organization. In addition, the district shall not impose or threaten to impose reprisals on employees, discriminate or threaten to discriminate against employees, or otherwise interfere with, restrain, or coerce employees because of their membership or nonmembership in an employee organization. (Government Code 3543.5, 3550)

(cf. 4119.1/4219.1/4319.1 - Civil and Legal Rights)

The Superintendent or designee may communicate with district employees regarding their rights under the law. Such communications shall be factual and accurate, and may not promise a benefit, threaten a reprisal, or in any way deter or discourage employees from joining an employee organization or paying dues.

However, before disseminating to multiple employees any mass communication concerning employees' right to join or support an employee organization or to refrain from joining or supporting an employee organization, such as a written document or script for oral or recorded presentation or message, the Superintendent or designee shall meet and confer with the employees' exclusive representative regarding the content of the communication. If the district and exclusive representative do not come to agreement on the content of the mass communication, the Superintendent or designee may disseminate the district's mass communication provided that, at the same time, copies of the exclusive representative's communication, which shall be of reasonable length, are also distributed. (Government Code 3553)

Access to Employee Orientations and Contact Information

The district shall permit employee organizations access to new employee orientations where newly hired employees are advised, whether in person, online, or through other means or mediums, of their employment status, rights, benefits, duties, responsibilities, or any other

employment-related matters. The district shall provide employee organizations at least 10 days' notice in advance of an orientation. However, in any specific instance where an unforeseeable, urgent need critical to the district's operation prevents the required 10 days' notice, a shorter notice may be provided. (Government Code 3555.5, 3556)

The structure, time, and manner of the access to new employee orientations shall be determined by mutual agreement of the district and the exclusive representative, following a request to negotiate by either party. If the district and exclusive representative fail to reach an agreement, matters related to the access to new employee orientation shall be subject to compulsory interest arbitration. The district and employee organization may mutually agree to submit any dispute to compulsory interest arbitration at any time. In addition, if any dispute arises during negotiations and is not resolved within 45 days after the first meeting or within 60 days after the initial request to negotiate, whichever is earlier, either party may make a demand for compulsory interest arbitration. When any such dispute arises during the summer when the district's administrative office is closed, the timeline shall commence on the first day the administrative office reopens. The decision of the arbitrator shall be final and binding on the parties. (Government Code 3556, 3557)

The date, time, and place of the orientation shall not be disclosed to anyone other than employees, the exclusive representative, or a vendor that is contracted to provide a service for purposes of the orientation. (Government Code 3556)

The Superintendent or designee shall provide an exclusive representative with the name, job title, department, work location, telephone numbers (work, home, and personal cell phone), personal email address(es) on file with the district, and home address of any newly hired employee in the bargaining unit, within 30 days of hire or by the first pay period of the month following hire. In addition, the Superintendent or designee shall provide the same information in regard to all employees in the bargaining unit to an exclusive representative at least every 120 days, unless more frequent or detailed lists are required by agreement with the exclusive representative. (Government Code 3558, 6254.3)

However, the Superintendent or designee shall not disclose the home address and any phone numbers on file for employees performing law enforcement-related functions, nor shall he/she disclose the home address, home or personal cell phone number(s), or personal email address(es) of any employee who is a participant in the Safe at Home address confidentiality program pursuant to Government Code 6207 or any employee who provides written request that the information not be disclosed for this purpose. Following receipt of a written request, the district shall remove the employee's home address, home and personal cell phone numbers, and personal email address from any mailing list maintained by the district unless the list is only used by the district to contact the employee. (Government Code 3558, 6207, 6254.3)

(cf. 1340 - Access to District Records)

Membership Dues or Other Payments to an Employee Organization

When drawing an order for the salary or wage payment of a bargaining unit employee of an

employee organization, the district shall deduct any amount which has been requested by the employee in a revocable written authorization for the purpose of paying dues or other payments for any service, program, or committee provided or sponsored by the employee organization. (Education Code 45060, 45168)

An employee organization that certifies that it has and will maintain individual employee authorizations shall handle and process employee written authorizations for payroll deductions. When an employee organization provides such a certification to the district, the district shall rely on information from the employee organization regarding the amounts of such payroll deductions and from which employees. The employee organization shall not be required to submit to the district a copy of the written authorization in order for the payroll deductions to be effective. However, when there is a dispute about the existence or terms of the written authorization, a copy of the employee's written authorization shall be submitted to the district. The employee organization shall indemnify the district for any employee claims regarding payroll deductions made by the district in reliance on notification from the employee organization. (Education Code 45060, 45168)

When an employee organization which has declined to certify that it will handle and process employee written authorizations makes a request for payroll deductions, the district shall request a copy of the employee's written authorization before making the payroll deductions. (Education Code 45060, 45168)

A written authorization shall remain in effect until expressly revoked in writing by the employee and pursuant to the terms of the written authorization. Employee requests to cancel or change authorizations for payroll deductions for employee organizations shall be directed to the employee organization rather than the district. The employee organization shall be responsible for processing these requests. The district shall rely on the information provided by the employee organization regarding whether deductions for an employee organization were properly canceled or changed. The employee organization shall be required to indemnify the district for any claims made by an employee for deductions made by the district in reliance on information from the employee organization. (Education Code 45060, 45168)

Legal Reference:

EDUCATION CODE

45060-45061.5 Deduction of fees from salary or wage payment, certificated employees

45100.5 Senior management positions

45104.5 Abolishment of senior classified management positions

45108.5 Definition of senior classified management employees

45108.7 Waiver of provisions of 45108.5

45168 Deduction of fees from salary or wage payment, classified employees

45220-45320 Merit system, classified employees

GOVERNMENT CODE

3540-3549.3 Educational Employment Relations Act, especially:

3540.1 Definitions

3543.4 Management position; representation
3545 Appropriateness of unit; basis
3550-3552 Prohibition on public employers deterring or discouraging union membership
3555-3559 Public employee communication, information and orientation
6205-6210 Confidentiality of addresses for victims of domestic violence, sexual assault or stalking
6254.3 Disclosure of employee contact information to employee organization
6503.5 Joint powers agencies
53260-53264 Employment contracts

CODE OF REGULATIONS, TITLE 8

33015-33490 Recognition of exclusive representative; proceedings
33700-33710 Severance of established unit
34020 Petition to rescind organizational security arrangement
34055 Reinstatement of organizational security arrangement

COURT DECISIONS

Janus v. American Federation of State, County and Municipal Employees, Council 31, (2018) 138 S.Ct. 2448

Friedrichs v. California Teachers Association, et al., (2016) 136 S.Ct. 1083

County of Los Angeles v. Service Employees International Union, Local 721, (2013) 56 Cal. 4th 905

Management Resources:

WEB SITES

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

Association of California School Administrators: <http://www.acsa.org>

California Federation of Teachers: <http://www.cft.org>

California School Employees Association: <http://www.csea.com>

California Teachers Association: <http://www.cta.org>

Public Employment Relations Board: <http://www.perb.ca.gov>

(11/11 10/17) 7/18

Policy
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Board Policy

Collective Bargaining Agreement

BP 4141 4241

Personnel

The Governing Board recognizes that collective bargaining agreements are legally binding, bilateral agreements with the exclusive representatives of employees pertaining to terms and conditions of employment. The Board is committed to carrying out the provisions of each agreement and expects the agreements to be consistently and uniformly administered.

(cf. 4140/4240/4340 - Bargaining Units)
(cf. 4143/4243 - Negotiations/Consultation)

Following adoption of the collective bargaining agreement, the Superintendent or designee shall review related Board policies and recommend to the Board any action needed to maintain consistency with the agreement. Whenever a Board policy conflicts with a provision in the collective bargaining agreement, the agreement shall be binding for those employees covered by the terms of the agreement.

(cf. 9310 - Board Policies)

Upon request by the Public Employment Relations Board, the Superintendent or designee shall provide, within 15 days of the request, a copy of the written agreement and any amendments. (8 CCR 32120)

Legal Reference:

EDUCATION CODE

35035 Additional powers and duties of superintendent, transfer authority
35036 Voluntary transfers
35160 Authority of governing boards
35160.1 Broad authority of school districts
45220-45320 Merit system, classified employees

GOVERNMENT CODE

3540-3549.3 Educational Employment Relations Act
CODE OF REGULATIONS, TITLE 8
31001-32997 Regulations of employee relations boards

Management Resources:

WEB SITES

CSBA: <http://www.csba.org>
California Public Employee Relations: <http://cper.berkeley.edu>
Center for Collaborative Solutions: <http://www.ccscenter.org>
Public Employment Relations Board: <http://www.perb.ca.gov>
State Mediation and Conciliation Service (SMCS): <http://www.dir.ca.gov/csmcs/smcs.html>

(9/88 10/95) 3/07

Policy
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Board Policy

Concerted Action/Work Stoppage

BP 4141.6 4241.6

Personnel

The Governing Board recognizes the importance of maintaining ongoing positive relations with employees and engaging in fair, respectful negotiations with employee organizations. The Board desires to reach agreement on employment contracts in a manner that does not disrupt school operations or impact student achievement.

(cf. 4141/4241 - Collective Bargaining Agreement)
(cf. 4143/4243 - Negotiations/Consultation)

The Board recognizes that advance planning is necessary to ensure that students receive the education to which they are entitled in the event of a work slowdown, sickout, strike, or other concerted activity by employees. The Superintendent or designee shall develop a written plan which shall include strategies for the provision of internal and external communications, preservation of student and staff safety, maintenance of district operations, and appropriate student instruction and supervision during a work slowdown or stoppage.

(cf. 0450 - Comprehensive Safety Plan)
(cf. 1100 - Communications with the Public)
(cf. 1112 - Media Relations)
(cf. 9000 - Role of the Board)

If an employee organization gives notice that it intends to strike, the Superintendent or designee shall notify the Public Employment Relations Board, Employment Development Department, employees in the striking unit, employees in the nonstriking unit, parents/guardians, students, law enforcement, the media, and others as appropriate.

Employees should be held accountable for their behavior during any labor dispute. The district may take disciplinary action against any employee who engages in an unlawful concerted action or in unlawful behavior in an otherwise protected activity, taking into account the seriousness of the behavior and the district's efforts to rebuild relations following the withholding of services by employees.

(cf. 4118 - Dismissal/Suspension/Disciplinary Action)
(cf. 4119.25/4219.25/4319.25 - Political Activities of Employees)
(cf. 4218 - Dismissal/Suspension/Disciplinary Action)

Legal Reference:
EDUCATION CODE

35204 Contract with attorney in private practice

Policy
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

(12/89 6/97) 3/07

Management Resources:
WEB SITES
CSBA: <http://www.csba.org>
Public Employment Relations Board: <http://www.perb.ca.gov>
State Mediation and Conciliation Service (SMCS): <http://www.dir.ca.gov/csmcs/sms.html>

35205 Contract for legal services
37200-37202 Instructional days
GOVERNMENT CODE
3540-3549.3 Educational Employment Relations Act, especially:
3543.5-3543.6 Unfair labor practices
3548-3548.8 Impasse procedures
INSURANCE CODE
10116 Employee continuation of insurance coverage
UNITED STATES CODE, TITLE 29
1161-1169 Continuation coverage and additional standards for group health plan
PUBLIC EMPLOYMENT RELATIONS BOARD DECISIONS
Fresno Unified School District, 1982, PERB Dec. No. 208, 6 PERC 13110
Konocit Unified School District, 1982, PERB Dec. No. 217, 6 PERC 13152

Administrative Regulation

Concerted Action/Work Stoppage

AR 4141.6 4241.6

Personnel

Maintenance of District Operations

At the discretion of the Superintendent or designee, employees reporting for duty may be temporarily assigned to other duties. In addition, the Superintendent or designee may hire qualified substitute and/or temporary employees as needed to maintain district operations and shall recommend to the Governing Board an appropriate rate of pay for such employees for the period of the work stoppage.

(cf. 4113 - Assignment)

(cf. 4121 - Temporary/Substitute Personnel)

Days of instruction lost due to a work stoppage may be made up following the end of the normal school year.

(cf. 6111 - School Calendar)

Strike Plan

The Superintendent or designee may establish a committee to develop a plan in the event of a work stoppage. This committee may include district-level staff, legal counsel, the district's negotiator and parents/guardians.

The strike plan shall address, at a minimum, the following elements:

1. Roles and responsibilities during a work stoppage, including roles of the Board, Superintendent, district-level staff, legal counsel, principals, certificated or classified staff when they are not participating in the strike, substitutes and other employees
2. Criteria for keeping schools open during a work stoppage including potential costs, availability of qualified substitutes or other staffing, the ability to maintain the quality of the educational program and other essential services, and the ability to ensure the safety of students and staff
3. Maintenance of the educational program, including availability of lesson plans and instructional materials, alternatives for handling special education and other programs as appropriate
4. Internal communications among district staff and the Board during a work stoppage
5. Plans for obtaining, paying and communicating with temporary or substitute employees

6. Status of district-paid benefits, including health care, insurance, vacation and sick leave benefits
 - (cf. 4154/4254/4354 - Health and Welfare Benefits)
 - (cf. 4161.1/4361.1 - Personal Illness/Injury Leave)
 - (cf. 4161.2/4261.2/4361.2 - Personal Leaves)
 - (cf. 4261.1 - Personal Illness/Injury Leave)
7. Communications with parents/guardians, the media, business partners, public officials and other community members that identify key messages, strategies and district spokespersons
 - (cf. 1100 - Communications with the Public)
 - (cf. 1112 - Media Relations)
 - (cf. 4143.1/4243.1 - Public Notice - Personnel Negotiations)
8. Equipment and supply needs
9. Desirability and feasibility of conducting extracurricular activities during a work stoppage including an analysis of the number of events and activities that would be affected, the availability of staffing, the degree of student and/or community participation and the ability to provide adequate security at events
 - (cf. 6145 - Extracurricular and Cocurricular Activities)
10. Contingency plans for transportation
 - (cf. 3541 - Transportation Routes and Services)
11. Contingency plans for the provision of food services
 - (cf. 3550 - Food Service/Child Nutrition Program)
12. Identification of outside resources who may be called upon to help with school operations
 - 13. Coordination with law enforcement and other agencies
 - (cf. 1400 - Relations Between Other Governmental Agencies and the Schools)
 - (cf. 1700 - Relations Between Private Industry and the Schools)
 - 14. Appropriate safeguards for the safety of students, working employees, substitutes, volunteers, parent/guardians and Board members
 - (cf. 0450 - Comprehensive Safety Plan)
 - 15. Provisions for safe, effective board meetings

16. Cost estimates for the various strategies to be implemented during a work stoppage

17. Legal remedies available to enjoin the work stoppage if possible or to file unfair labor practice charges against the employee organization

18. Continuation of negotiations during a work stoppage

(cf. 4143/4243 - Negotiations/Consultation)

19. Plans for resuming normal district operations, rebuilding relations and disciplining employees if necessary after the work stoppage

Activities of Employees

The district shall not impose or threaten to impose reprisals, discriminate or threaten to discriminate, or otherwise interfere with, restrain or coerce employees for the exercise of their rights. (Government Code 3543.5-3543.6)

Employees engaging in a work stoppage shall not prevent access to school facilities by other employees, substitute or students; use or threaten physical violence or bodily injury; trespass; distribute malicious or defamatory leaflets or materials; or otherwise coerce or intimidate individuals in the conduct of school business.

During an actual or threatened work stoppage, an employee shall not retain in his/her possession any district property, including but not limited to student attendance and grading records, lesson plans, keys, equipment and supplies.

(cf. 3512 - Equipment)

Employees shall not use students to distribute messages that promote or explain the position of any employee organization that is contemplating or engaged in a work stoppage. In addition, employees shall not use classroom or other duty time to promote an employee organization's position in negotiations or in a work stoppage.

When students raise questions related to a work stoppage, teachers shall approach the subject in accordance with the district's policy on controversial issues and shall not allow such discussions to interfere with their regular teaching responsibilities.

(cf. 6144 - Controversial Issues)

Salary and Benefits

Employees withholding services shall not receive salary or unemployment benefits during the period of the work stoppage.

Any employee withholding services may be subject to the loss of payroll deduction privileges.

The district may not pay contributions to health care benefits if employees fail to work the minimum number of hours per month as specified in the collective bargaining agreement, Board policy or administrative regulation. However, the district shall offer employees the option of paying their own coverage under COBRA. (29 USC 1161-1169)

If the district determines that it will withhold its contributions to employees' life and disability insurance, employees shall be offered an opportunity to retain these coverages by paying the contributions themselves. (Insurance Code 10116)

Employees whose vacation leave has been authorized prior to the work stoppage shall receive vacation pay for the authorized period.

If an employee is on a paid sick or disability leave when the work stoppage begins, he/she shall be entitled to continued payment as long as he/she remains ill or disabled and is otherwise eligible according to Board policy and collective bargaining agreements.

The Superintendent or designee may determine that credit shall not be applied toward probationary service, salary schedule advancement, permanent status, vacation earnings, retirement credit or sick leave accrual during the period of time that employees withhold services.

(12/89 12/91) 6/97

Board Policy

Negotiations/Consultation

BP 4143 4243

Personnel

The Governing Board recognizes its responsibility to represent the public's interests in the collective bargaining process. In ratifying agreements on employee contracts, the Board shall balance the needs of staff and the priorities of the district in order to provide students with a high-quality instructional program based on a sound, realistic budget.

(cf. 0200 - Goals for the School District)
(cf. 3100 - Budget)
(cf. 4140/4240/4340 - Bargaining Units)
(cf. 4141/4241 - Collective Bargaining Agreement)

The Board and the Superintendent shall establish a bargaining team to assist in analyzing contract provisions and conducting contract negotiations. The Board shall provide its negotiator(s) with expected outcomes and clear parameters for acceptable contract provisions which promote the realization of district goals and priorities.

The Board and its bargaining team shall negotiate in good faith with exclusive employee representatives on wages, hours of employment, and other terms and conditions of employment identified in law as being within the scope of representation. (Government Code 3543.2)

When the district intends to make any change to matters within the scope of representation, it shall give reasonable written notice of its intent to the exclusive representative for the purpose of providing the exclusive representative a reasonable amount of time to negotiate with the district regarding the proposed changes. (Government Code 3543.2)

A reasonable number of representatives of the employee organization shall have the right to receive reasonable periods of released time without loss of district compensation when meeting and negotiating and/or for the processing of grievances. (Government Code 3543.1)

The Board and its bargaining team shall establish standards of conduct pertaining to the negotiations process for members of the bargaining team. Certain meetings related to negotiations shall not be open to the public in accordance with Government Code 3549.1 and 54957.6, except as otherwise required by law. Matters discussed in these meetings shall be kept in strict confidence in accordance with law.

(cf. 4119.23/4219.23/4319.23 - Unauthorized Release of Confidential/Privileged Information)
(cf. 9010 - Public Statements)
(cf. 9011 - Disclosure of Confidential/Privileged Information)
(cf. 9321 - Closed Session Purposes and Agendas)

The Board and its negotiator(s) shall not knowingly provide the employee organization with inaccurate information regarding the financial resources of the district. (Government Code

3543.5)

The Board shall monitor the progress of negotiations and carefully consider how proposed contract provisions would affect the district's short- and long-term fiscal, programmatic, instructional, and personnel goals.

The Board and/or Superintendent or designee shall keep the public informed about the progress of negotiations and the ways in which negotiations may affect district goals unless otherwise agreed upon by the district and exclusive representative.

(cf. 4143.1/4243.1- Public Notice - Personnel Negotiations)

Whenever the district has a qualified or negative certification on an interim fiscal report, it shall allow the county office of education at least 10 working days to review and comment on any proposed agreement with exclusive representatives of employees. The district shall provide the County Superintendent of Schools with all information relevant to gain an understanding of the financial impact of any final collective bargaining agreement. (Government Code 3540.2)

(cf. 3460 - Financial Reports and Accountability)

Once the final terms of the agreement have been ratified by the membership of the employee organization, the contract shall be presented to the Board at a public meeting for acceptance.

Any agreement adopted by the Board may be for a term not to exceed three years. (Government Code 3540.1)

In the event of an impasse in negotiations, the district shall participate in good faith in mediation and fact-finding procedures pursuant to Government Code 3548-3548.8. (Government Code 3543.5)

(cf. 4141.6/4241.6 - Concerted Action/Work Stoppage)

Following adoption of the collective bargaining agreement, any subsequent amendments shall be executed in writing and ratified by the Board and the employees' exclusive representative.

Consultation

The exclusive representative of certificated staff may consult with the Board on the definition of educational objectives, the determination of the content of courses and curriculum, and the selection of textbooks.

(cf. 6011 - Academic Standards)

(cf. 6141 - Curriculum Development and Evaluation)

(cf. 6161.1 - Selection and Evaluation of Instructional Materials)

(cf. 9310 - Board Policies)

Legal Reference:

EDUCATION CODE

44987 Service as officer of employee organization (certificated)

45210 Service as officer of employee organization (classified)

GOVERNMENT CODE

3540-3549.3 Educational Employment Relations Act

PUBLIC EMPLOYMENT RELATIONS BOARD DECISIONS

Berkeley Council of Classified Employees v. Berkeley Unified School District, (2008) PERB
Decision No. 1954

Management Resources:

WEB SITES

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

California Public Employee Relations: <http://cper.berkeley.edu>

Center for Collaborative Solutions: <http://www.ccscenter.org/labormgmt>

Public Employment Relations Board: <http://www.perb.ca.gov>

State Mediation and Conciliation Service (SMCS): <http://www.dir.ca.gov/csmcs/smcs.aspx>

(10/95 3/07) 4/15

Policy
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Board Policy

Public Notice - Personnel Negotiations

BP 4143.1 4243.1

Personnel

Because the Governing Board has a responsibility to represent the public's interest in negotiations with employee organizations, the Board is committed to keeping the public informed about issues being negotiated, providing members of the public an opportunity to express their views, and disclosing the position of each Board member in accordance with law.

(cf. 1112 - Media Relations)

(cf. 4141/4241 - Collective Bargaining Agreement)

(cf. 4143/4243 - Negotiations/Consultation)

(cf. 9000 - Role of the Board)

(cf. 9010 - Public Statements)

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

Public Notice/Sunshining of Initial Proposals

All initial contract proposals of the Board and an employee organization which relate to matters within the scope of representation shall be presented at a public Board meeting and shall thereafter be public records. (Government Code 3547)

(cf. 1340 - Access to District Records)

(cf. 9321 - Closed Session Purposes and Agendas)

(cf. 9321.1 - Closed Session Actions and Reports)

Meeting and negotiating between district and employee organization representatives shall not take place on these initial proposals until a reasonable time has elapsed after the submission of these proposals to enable the public to become informed and to express itself regarding the proposals at a public Board meeting. (Government Code 3547)

After the public has had an opportunity to provide input, the Board shall adopt its initial proposal at a public meeting. (Government Code 3547)

New subjects of meeting and negotiating arising after the presentation of initial proposals shall be made public within 24 hours. If a vote is taken on any such subject by the Board, each Board member's vote also shall be made public within 24 hours. (Government Code 3547)

Public Disclosure of Proposed Agreement

Before entering into a written agreement covering matters within the scope of representation, the Board shall disclose, at a public meeting, the major provisions of the agreement, including, but not limited to, the costs that would be incurred by the district under the agreement for the current

and subsequent fiscal years. (Government Code 3547.5)

The Superintendent and chief business official shall certify, in writing, that any costs incurred by the district under the agreement can be met by the district during the term of the agreement and shall submit the certification to the Board prior to the Board's approval of the agreement. The certification shall itemize any budget revision necessary to meet the costs of the agreement in each year of its term. (Government Code 3547.5)

(cf. 3460 - Financial Reports and Accountability)

A copy of the proposed agreement shall be made available to the public prior to the day of the Board meeting.

The Superintendent or designee may prepare a summary of the major provisions and changes in the proposed agreement.

Legal Reference:

EDUCATION CODE

42130-42134 Financial reports and certifications

GOVERNMENT CODE

3540.2 Meeting and negotiating in public educational employment

3547 Proposals relating to representation; informing public

3547.5 Major provisions of agreement with exclusive representative

CODE OF REGULATIONS, TITLE 8

32075 PERB regional office defined

Management Resources:

WEB SITES

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

California Department of Education: <http://www.cde.ca.gov>

Fiscal Crisis and Management Assistance Team: <http://www.fcmat.org>

Public Employment Relations Board: <http://www.perb.ca.gov>

School Services of California: <http://www.sscal.com>

(7/01 11/04) 3/07

Policy
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Administrative Regulation

Public Notice - Personnel Negotiations

AR 4143.1 4243.1

Personnel

Public Disclosure of Proposed Agreement

The Superintendent or designee may prepare a summary of the proposed agreement which shall include, but may not necessarily be limited to:

1. Major provisions of the agreement that affect compensation, such as:
 - a. Direct increases in salaries and percentage change in on-schedule salaries
 - b. Changes in health and welfare benefits
 - c. Changes in health and welfare benefit dollar contributions by the district
 - d. Changes in step and column or longevity provisions
 - e. Changes in overtime, differential, callback, and standby pay provisions
 - f. Changes in staffing ratios
 - g. One-time bonuses or off-the-schedule increases
2. Other provisions that will result in increased costs to the district even if they do not involve an increase in employee compensation, such as class-size reduction or increased number of staff development days
3. Costs of the proposed agreement, for the current and subsequent fiscal years, categorized for salaries, benefits, other compensation, and other noncompensation costs, including percentage increase of total compensation (salaries, benefits, and other compensation provisions) for the average represented employee as a result of the agreement and the approximate cost to the district of providing a one percent increase in total compensation
4. Proposed source(s) of funding for the current and subsequent fiscal years including the assumptions used to determine available resources to meet the obligations of the proposed agreement
5. Other major provisions that do not directly affect the district's costs, such as binding arbitration or grievance procedures

(7/01 11/04) 3/07

Regulation
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Board Policy

Complaints

BP 4144 4244, 4344

Personnel

The Governing Board recognizes the need to establish a process to allow employees and job applicants to have their concerns heard in an expeditious and unbiased manner. The Board expects that employees will make every effort to resolve complaints and disagreements informally before filing a formal complaint.

(cf. 1312.3 - Uniform Complaint Procedures)
(cf. 1312.4 - Williams Uniform Complaint Procedures)
(cf. 3320 - Claims and Actions Against the District)
(cf. 4030 - Nondiscrimination in Employment)
(cf. 4119.11/4219.11/4319.11 - Sexual Harassment)

The Board prohibits retaliation against complainants. The Superintendent or designee may keep a complainant's identity confidential, except to the extent necessary to investigate the complaint.

(cf. 4119.1/4219.1/4319.1 - Civil and Legal Rights)
(cf. 4119.23/4219.23/4319.23 - Unauthorized Release of Confidential/Privileged Information)

All matters related to a complaint shall be kept confidential and any document, communication, or record regarding the complaint shall be placed in a separate file and shall not be placed in an employee's personnel file.

(cf. 4112.6/4212.6/4312.6 - Personnel Files)

Legal Reference:

EDUCATION CODE

200-262.4 Prohibition of discrimination on the basis of sex

35186 Williams uniform complaint procedures

44110-44114 Reporting by school employees of improper governmental activity

GOVERNMENT CODE

3543 Public school employees' rights

3543.1 Rights of employee organizations

53296-53299 Disclosure of confidential information; whistleblower

54957 Closed session; personnel matters

LABOR CODE

1102.5-1106 Whistleblower protections

CODE OF REGULATIONS, TITLE 5

4900-4965 Nondiscrimination in district programs and activities

Management Resources:
WEB SITES
CSBA: <http://www.csba.org>

(6/90 6/92) 3/08

Policy
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Administrative Regulation

Complaints

AR 4144 4244, 4344

Personnel

The procedure specified in this administrative regulation shall be used to investigate and resolve any complaint by an employee alleging misapplication of the district's policies, regulations, rules, or procedures or for "whistleblower" complaints by an employee or job applicant regarding an improper district activity including, but not limited to, an allegation of gross mismanagement, a significant waste of funds, an abuse of authority, or a specific danger to public health or safety.

(cf. 4119.1/4219.1/4319.1 - Civil and Legal Rights)

Any of the time limits specified in the following procedure may be extended by written agreement between the district and complainant.

Step 1: Informal Complaint Process

Prior to instituting a formal, written complaint, the employee shall first discuss the issue with his/her supervisor or the principal of the school where the alleged act took place. Formal complaint procedures shall not be initiated until the employee has first attempted to resolve the complaint informally.

Step 2: Site Level Formal Complaint Process

If a complaint has not been satisfactorily resolved through the informal process in Step 1, the complainant may file a written complaint with his/her immediate supervisor or principal within 60 days of the act or event which is the subject of the complaint. If an employee fails to file a written complaint within 60 days, the complaint shall be considered resolved on the basis of the preceding step.

In the written complaint, the employee shall specify the nature of the problem, including names, dates, locations, witnesses, the remedy sought by the employee, and a description of informal efforts to resolve the issue.

Within 10 working days of receiving the complaint, the immediate supervisor or principal shall conduct any necessary investigation and meet with the complainant in an effort to resolve the complaint. Within five working days after the meeting, he/she shall prepare and send a written response to the complainant.

Step 3: District Level Appeal

If a complaint has not been satisfactorily resolved at Step 2, the complainant may file the written complaint with the Superintendent or designee within five working days of receiving the written response from the immediate supervisor or the principal. The complainant shall include all

information presented to the immediate supervisor or principal at Step 2.

Within 10 working days of receiving the complaint, the Superintendent or designee shall conduct any necessary investigation, including reviewing the investigation and written response by the immediate supervisor or principal at Step 2, and shall meet with the complainant in an effort to resolve the complaint. Within five working days after the meeting, he/she shall prepare and send a written response to the complainant.

Step 4: Appeal to the Governing Board

If a complaint has not been satisfactorily resolved at Step 3, the complainant may file a written appeal to the Board within five working days of receiving the Superintendent or designee's response. All information presented at Steps 1, 2, and 3 shall be included with the appeal, and the Superintendent or designee shall submit to the Board a written report describing attempts to resolve the complaint and the district's response.

The Board may uphold the findings by the Superintendent or designee without hearing the complaint or the Board may hear the complaint at a regular or special Board meeting. The hearing shall be held in closed session if the complaint relates to matters that may be addressed in closed session in accordance with law.

(cf. 9321 - Closed Session Purposes and Agendas)

The Board shall make its decision within 30 days of the hearing and shall send its decision to all concerned parties. The Board's decision shall be final.

Alternate Procedures

Complaints alleging unlawful discrimination on any basis specified in the district's nondiscrimination policies, including complaints of sexual harassment, shall be resolved in accordance with the district's procedure in BP/AR 4030 - Nondiscrimination in Employment.

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

(cf. 4030 - Nondiscrimination in Employment)

(cf. 4119.11/4219.11/4319.11 - Sexual Harassment)

Complaints regarding unlawful discrimination in district programs or the district's failure to comply with state or federal laws regarding educational programs shall be resolved in accordance with BP/AR 1312.3 - Uniform Complaint Procedures. Complaints regarding sufficiency of textbook materials, teacher vacancy or misassignment, or an urgent or emergency facility condition shall be resolved in accordance with AR 1312.4 - Williams Uniform Complaint Procedures. (Education Code 35186; 5 CCR 4621)

(cf. 1312.3 - Uniform Complaint Procedures)

(cf. 1312.4 - Williams Uniform Complaint Procedures)

For complaints regarding working conditions or other subjects of negotiation, the employee shall use the grievance procedure specified in the applicable collective bargaining agreement.

(6/90 3/08) 12/17

Regulation
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Board Policy

Employee Compensation

BP 4151 4251, 4351

Personnel

In order to recruit and retain employees committed to the district's goals for student learning, the Governing Board recognizes the importance of offering a competitive compensation package which includes salaries and health and welfare benefits.

(cf. 3100 - Budget)

(cf. 3400 - Management of Districts Assets/Accounts)

(cf. 4000 - Concepts and Roles)

(cf. 4154/4254/4354 - Health and Welfare Benefits)

The Board shall adopt separate salary schedules for certificated, classified, and supervisory and administrative personnel. These schedules shall comply with law and collective bargaining agreements and shall be printed and made available for review at the district office. (Education Code 45022, 45023, 45160, 45162)

(cf. 4121 - Temporary/Substitute Personnel)

(cf. 4141/4241 - Collective Bargaining Agreement)

(cf. 4143/4243 - Negotiations/Consultation)

Each certificated employee, except an employee in an administrative or supervisory position, shall be classified on the salary schedule on the basis of uniform allowance for years of training and years of experience, unless the Board and employee organization negotiate and mutually agree to a salary schedule based on different criteria. Certificated employees shall not be placed in different classifications on the schedule, nor paid different salaries, solely on the basis of the grade levels at which they teach. (Education Code 45028)

(cf. 4030 - Nondiscrimination in Employment)

Salary schedules for staff who are not a part of a bargaining unit shall be determined by the Board at the recommendation of the Superintendent or designee.

(cf. 4140/4240/4340 - Bargaining Units)

(cf. 4312.1 - Contracts)

The Board shall determine the frequency and schedule of salary payments, including whether payments for employees who work less than 12 months per year will be made over the course of the school year or in equal installments over the calendar year. (Education Code 45038, 45039, 45048, 45165)

The Superintendent or designee shall post a notice explaining the Fair Labor Standards Act's wage and hour provisions in a conspicuous place at each work site. (29 CFR 516.4)

Overtime Compensation

A district employee shall be paid an overtime rate of not less than one and one-half times his/her regular rate of pay for any hours worked in excess of eight hours in one day or 40 hours in one work week. However, employees shall be exempt from overtime rules if they are employed as teachers or school administrators or if they qualify as being employed in an executive, administrative, or professional capacity and are paid a fixed salary at or above the salary level established by federal regulations. (Labor Code 510; 29 USC 213; 29 CFR 541.0-541.710, 553.27, 553.32)

When authorized in a collective bargaining agreement or other agreement between the district and employees, an employee may take compensatory time off in lieu of overtime compensation, provided he/she has not accrued compensatory time in excess of the limits specified in 29 USC 207. An employee who has requested the use of compensatory time shall be allowed to use such time within a reasonable period after making the request if the use of the compensatory time does not unduly disrupt district operations. (29 USC 207; 29 CFR 553.20-553.25)

For each nonexempt employee, the Superintendent or designee shall maintain records on the employee's wages, hours, and other information specified in 29 CFR 516.5-516.6.

(cf. 3580 - District Records)

(cf. 4112.6/4212.6/4312.6 - Personnel Files)

Legal Reference:

EDUCATION CODE

45022-45061.5 Salaries, especially:

45023 Availability of salary schedule

45028 Salary schedule for certificated employees

45160-45169 Salaries for classified employees

45268 Salary schedule for classified service in merit system districts

GOVERNMENT CODE

3540-3549 Meeting and negotiating, especially:

3543.2 Scope of representation

3543.7 Duty to meet and negotiate in good faith

LABOR CODE

226 Employee access to payroll records

232 Disclosure of wages

510 Overtime compensation; length of work day and week; alternative schedules

UNITED STATES CODE, TITLE 26

409A Deferred compensation plans

UNITED STATES CODE, TITLE 29

201-219 Fair Labor Standards Act, especially:

203 Definitions

207 Overtime

213 Exemptions from minimum wage and overtime requirements

CODE OF FEDERAL REGULATIONS, TITLE 26

1.409A-1 Definitions and covered plans

CODE OF FEDERAL REGULATIONS, TITLE 29

516.4 Notice of minimum wage and overtime provisions

516.5-516.6 Records

541.0-541.710 Exemptions for executive, administrative, and professional employees

553.1-553.51 Fair Labor Standards Act; applicability to public agencies

COURT DECISIONS

Flores v. City of San Gabriel, 9th Cir., June 2, 2016, No. 14-56421

Management Resources:

WEB SITES

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

Internal Revenue Service: <http://www.irs.gov>

School Services of California, Inc.: <http://www.sscal.com>

U.S. Department of Labor, Wage and Hour Division: <https://www.dol.gov/whd>

(2/97 7/08) 10/16

Policy
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Board Policy

Health And Welfare Benefits

BP 4154 4254, 4354

Personnel

The Governing Board recognizes that health and welfare benefits are essential to promote employee health and productivity and are an important part of the compensation offered to employees. The district shall provide health and welfare benefits for employees in accordance with state and federal law and subject to negotiated employee agreements.

(cf. 4140/4240/4340 - Bargaining Units)

(cf. 4141/4241 - Collective Bargaining Agreement)

(cf. 4151/4251/4351 - Employee Compensation)

Certificated management, administrative, and supervisory employees who are not in bargaining units shall receive the same health and welfare benefits as those specified in the collective bargaining agreement for certificated employees. Classified management, administrative, and supervisory employees who are not in bargaining units shall receive the same health and welfare benefits as those specified in the collective bargaining agreement for classified employees.

(cf. 4300 - Administrative and Supervisory Personnel)

For purposes of granting benefits, a registered domestic partner and his/her child shall have the same rights, protections, and benefits as a spouse and spouse's child. (Family Code 297.5, 300)

With respect to eligibility to participate in the health benefits plan or the level of health benefits provided, the district shall not discriminate in favor of employees who are among the highest paid 25 percent of all district employees. (26 USC 105; 42 USC 300gg-16)

Continuation of Coverage

Retired certificated employees, other employees who would otherwise lose coverage due to a qualifying event specified in law and administrative regulation, and their qualified beneficiaries may continue to participate in the district's group health and welfare benefits in accordance with state and federal law.

Unless otherwise provided for in the applicable collective bargaining agreement, covered employees and their qualified beneficiaries may receive continuation coverage by paying the premiums, dues, and other charges, including any increases in premiums, dues, and costs incurred by the district in administering the program.

Confidentiality

The Superintendent or designee shall not use or disclose any employee's medical information the district possesses without the employee's authorization obtained in accordance with Civil Code

56.21, except for the purpose of administering and maintaining employee benefit plans and for other purposes specified in law. (Civil Code 56.20)

(cf. 4112.6/4212.6/4312.6 - Personnel Files)

Legal Reference:

EDUCATION CODE

7000-7008 Health and welfare benefits, retired certificated employees

17566 Self-insurance fund

35208 Liability insurance

35214 Liability insurance (self-insurance)

44041-44042 Payroll deductions for collection of premiums

44986 Leave of absence, state disability benefits

45136 Benefits for classified employees

CIVIL CODE

56.10-56.16 Disclosure of information by medical providers

56.20-56.245 Use and disclosure of medical information by employers

FAMILY CODE

297-297.5 Rights, protections and benefits under law; registered domestic partners

300 Definition of marriage

GOVERNMENT CODE

12940 Discrimination in employment

22750-22944 Public Employees' Medical and Hospital Care Act

53200-53210 Group insurance

HEALTH AND SAFETY CODE

1366.20-1366.29 Cal-COBRA program, health insurance

1367.08 Disclosure of fees and commissions paid related to health care service plan

1373 Health services plan, coverage for dependent children who are full-time students

1373.621 Continuation coverage, age 60 or older after five years with district

1374.58 Coverage for registered domestic partners, health service plans and health insurers

INSURANCE CODE

10116.5 Continuation coverage, age 60 or older after five years with district

10128.50-10128.59 Cal-COBRA program, disability insurance

10277-10278 Group and individual health insurance, coverage for dependent children

10604.5 Annual disclosure of fees and commissions paid

12670-12692.5 Conversion coverage

LABOR CODE

2800.2 Notification of conversion and continuation coverage

4856 Health benefits for spouse of peace officer killed in performance of duties

UNEMPLOYMENT INSURANCE CODE

2613 Education program; notice of rights and benefits

UNITED STATES CODE, TITLE 1

7 Definition of marriage, spouse

UNITED STATES CODE, TITLE 26

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

4980B COBRA continuation coverage
4980H Penalty for noncompliance with employer-provided health care requirements
5000A Minimum essential coverage
6056 Report of health coverage provided to employees
UNITED STATES CODE, TITLE 29
1161-1168 COBRA continuation coverage
UNITED STATES CODE, TITLE 42
300gg-300gg95 Patient Protection and Affordable Care Act, especially:
300gg-16 Group health plan; nondiscrimination in favor of highly compensated individuals
1395-1395g Medicare benefits
CODE OF FEDERAL REGULATIONS, TITLE 26
54.4980B-1-54.4980B-10 COBRA continuation coverage
54.4980H-1-54.4980H-6 Patient Protection and Affordable Care Act
1.105-11 Self-insured medical reimbursement plan
CODE OF FEDERAL REGULATIONS, TITLE 45
164.500-164.534 Health Insurance Portability and Accountability Act (HIPAA)

Management Resources:

CALIFORNIA SCHOOL BOARDS ASSOCIATION PUBLICATIONS

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

INTERNAL REVENUE SERVICE NOTICES

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

U.S. DEPARTMENT OF TREASURY PUBLICATIONS

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

WEB SITES

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

California Employment Development Department: <http://www.edd.ca.gov>

Internal Revenue Service: <http://www.irs.gov>

U.S. Department of Health and Human Services, Centers for Medicare and Medicaid Services:
<http://www.cms.gov>

U.S. Department of Labor: <http://www.dol.gov>

(7/09 7/12) 10/15

Policy
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Board Policy

Awards And Recognition

BP 4156.2 4256.2,4356.2

Personnel

The Governing Board values its instructional and noninstructional staff and desires to recognize their outstanding service in order to increase employee morale and encourage creative and innovative performance.

(cf. 1150 - Commendations and Awards)

(cf. 5126 - Awards for Achievement)

The Board encourages recognition of all staff during days of significance designated by the Board, state law, or state resolution.

(cf. 6115 - Ceremonies and Observances)

The Board authorizes awards to individual employees who: (Education Code 44015)

1. Propose procedures or ideas that result in eliminating or reducing district expenditures or improving district operations
2. Perform special acts or services in the public interest
3. By their superior accomplishments, make exceptional contributions to the efficiency, economy, or other improvement in district operations

As the district budget permits, the Superintendent or designee may recognize such employees by issuing service pins, certificates, plaques, and/or other mementos. In addition, he/she may recommend employees to the Board for recognition at a public Board meeting.

(cf. 3100 - Budget)

(cf. 3300 - Expenditures and Purchases)

The Superintendent or designee shall establish procedures for the selection of individual employees to receive awards.

The Superintendent or designee may appoint one or more merit award committees consisting of Board members, district employees, and/or private citizens to review employee contributions and recommend awards.

Monetary awards to employees shall not exceed \$200 unless expressly approved by the Board. (Education Code 44015)

(cf. 1220 - Citizen Advisory Committees)

(cf. 9140 - Board Representatives)

Legal Reference:

EDUCATION CODE

- 35160 Authority of governing boards
- 35160.1 Broad authority of school districts
- 35161 Powers and duties generally
- 44015 Awards to employees
- 45460 Classified School Employee Week

Management Resources:

WEB SITES

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

Fiscal Crisis and Management Assistance Team: <http://www.fcmat.org>

(1/85 12/91) 7/10

Policy
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Board Policy

Employee Safety

BP 4157 4257, 4357

Personnel

The Governing Board is committed to maximizing employee safety and believes that workplace safety is every employee's responsibility. Working conditions and equipment shall comply with standards prescribed by federal, state, and local laws and regulations.

(cf. 0450 - Comprehensive Safety Plan)

No employee shall be required or permitted to be in any place of employment which is unsafe or unhealthful. (Labor Code 6402)

The Board expects all employees to use safe work practices and, to the extent possible, correct any unsafe conditions which may occur. If an employee is unable to correct an unsafe condition, he/she shall immediately report the problem to the Superintendent or designee.

The Superintendent or designee shall promote safety and correct any unsafe work practices through education and enforcement.

(cf. 4118 - Dismissal/Suspension/Disciplinary Action)

(cf. 4218 - Dismissal/Suspension/Disciplinary Action)

The Superintendent or designee shall establish and implement a written injury and illness prevention program in accordance with law. (Labor Code 6401.7)

(cf. 3514 - Environmental Safety)

(cf. 3514.1 - Hazardous Substances)

(cf. 3516 - Emergencies and Disaster Preparedness Plan)

(cf. 4119.41/4219.41/4319.41 - Employees with Infectious Disease)

(cf. 4119.42/4219.42/4319.42 - Exposure Control Plan for Bloodborne Pathogens)

(cf. 4119.43/4219.43/4319.43 - Universal Precautions)

(cf. 4157.2/4257.2/4357.2 - Ergonomics)

(cf. 4158/4258/4358 - Employee Security)

The Superintendent or designee shall ensure the ready availability of first aid materials at district workplaces and shall make effective provisions, in advance, for prompt medical treatment in the event of an employee's serious injury or illness. (8 CCR 3400)

No employee shall be discharged or discriminated against for making complaints, instituting proceedings, or testifying with regard to employee safety or health or for participating in any occupational health and safety committee established pursuant to Labor Code 6401.7. (Labor Code 6310)

Legal Reference:

EDUCATION CODE

32030-32034 Eye safety

32225-32226 Communications devices in classrooms

32280-32289 School safety plans

44984 Required rules for industrial accident and illness leave of absence

GOVERNMENT CODE

3543.2 Scope of bargaining

LABOR CODE

3300 Definitions

6305 Occupational safety and health standards; special order

6310 Retaliation for filing complaint prohibited

6400-6413.5 Responsibilities and duties of employers and employees, especially:

6401.7 Injury and illness prevention program

CODE OF REGULATIONS, TITLE 8

3203 Injury and illness prevention program

3400 Medical services and first aid

5095-5100 Control of noise exposure

CODE OF FEDERAL REGULATIONS, TITLE 29

1910.95 Noise standards

Management Resources:

DEPARTMENT OF INDUSTRIAL RELATIONS PUBLICATIONS

Guide to Developing Your Workplace Injury and Illness Prevention Program, rev. August 2005

WEB SITES

California Department of Industrial Relations, Occupational Safety and Health:

http://www.dir.ca.gov/occupational_safety.html

Centers for Disease Control and Prevention: <http://www.cdc.gov>

National Hearing Conservation Association: <http://www.hearingconservation.org>

National Institute for Occupational Safety and Health: <http://www.cdc.gov/niosh>

U.S. Department of Labor, Occupational Safety and Health Administration: <http://www.osha.gov>

(6/91 7/99) 3/10

Policy
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Administrative Regulation

Employee Safety

AR 4157 4257, 4357

Personnel

The Superintendent or designee shall provide and implement safety devices, safeguards, methods, and processes that are reasonably adequate to render the employment and place of employment safe and healthful. (Labor Code 6401)

(cf. 4157.1/4257.1/4357.1 - Work-Related Injuries)

(cf. 4157.2/4257.2/4357.2 - Ergonomics)

(cf. 4161.11/4261.11/4361.11 - Industrial Accident/Illness Leave)

Injury and Illness Prevention Program

The district's injury and illness prevention program shall cover all district employees and all other workers whom the district controls or directs and directly supervises on the job to the extent that the workers are exposed to hazards specific to their worksite and job assignment. The obligation of contractors or other employers who control or direct and supervise their own employees on the job shall not be affected by the district's injury and illness prevention program. (Labor Code 6401.7)

The district's injury and illness prevention program shall include: (Labor Code 6401.7; 8 CCR 3203)

1. The name/position of the person(s) with authority and responsibility for implementing the program.

2. A system for ensuring that employees comply with safe and healthful work practices, which may include, but not be limited to:

a. Recognition of employees who follow safe and healthful work practices

(cf. 4156.2/4256.2/4356.2 - Awards and Recognition)

b. Training and retraining programs

c. Disciplinary actions

(cf. 4118 - Dismissal/Suspension/Disciplinary Action)

(cf. 4218 - Dismissal/Suspension/Disciplinary Action)

3. A system for communicating with employees, in a form readily understandable by all

employees, on matters related to occupational health and safety, including provisions designed to encourage employees to report hazards at the worksite without fear of reprisal. The communications system may include, but not be limited to:

- a. Meetings
 - b. Training programs
 - c. Posting
 - d. Written communications
 - e. A system of anonymous notification by employees about hazards
4. Procedures for identifying and evaluating workplace hazards, including scheduled periodic inspections to identify unsafe conditions and work practices. Such inspections shall be made:
- a. Whenever new substances, processes, procedures, or equipment that represents a new occupational safety or health hazard is introduced into the workplace
 - b. Whenever the district is made aware of a new or previously unrecognized hazard
- (cf. 3514 - Environmental Safety)
(cf. 3514.1 - Hazardous Substances)
5. A procedure for investigating occupational injury or illness.
6. Methods and/or procedures for correcting unsafe or unhealthful conditions, work practices, and work procedures in a timely manner, based on the severity of the hazard, when the hazard is observed or discovered.

When an imminent hazard exists which cannot be immediately abated without endangering employee(s) and/or property, these procedures shall call for the removal of all exposed staff from the area except those necessary to correct the hazardous condition. Employees needed to correct the condition shall be provided necessary safeguards.

7. Provision of training and instruction as follows:
- a. To all new employees
 - b. To all employees given new job assignments for which training has not previously been received
 - c. Whenever new substances, processes, procedures, or equipment is introduced into the

workplace and represents a new hazard

d. Whenever the district is made aware of a new or previously unrecognized hazard

e. To supervisors, to familiarize them with the safety and health hazards to which employees under their immediate direction and control may be exposed

(cf. 4131 - Staff Development)

(cf. 4231 - Staff Development)

(cf. 4331 - Staff Development)

Hearing Protection

Whenever employee noise exposure equals or exceeds the standards specified in law, the Superintendent or designee shall implement a hearing conservation program in accordance with state and federal regulations, including, when required, monitoring of sound levels, audiometric testing of affected employees, the provision of hearing protectors, and employee training. (8 CCR 5095-5100; 29 CFR 1910.95)

Eye Safety Devices

Eye safety devices shall be worn by employees whenever they are engaged in or observing an activity involving hazards or hazardous substances likely to cause injury to the eyes. (Education Code 32030-32034)

First Aid and Medical Services

The Superintendent or designee shall ensure the ready availability of medical personnel for advice and consultation on matters of industrial health or injury. Whenever a workplace is not in close proximity to an infirmary, clinic, or hospital where all injured employees may be treated, the Superintendent or designee shall ensure that at least one employee is adequately trained to provide first aid. (8 CCR 3400)

The Superintendent or designee shall make adequate first aid materials readily available for employees at every worksite. Such materials shall be approved by a consulting physician and shall be kept in a sanitary and usable condition. The Superintendent or designee shall frequently inspect all first aid materials and replenish them as necessary. (8 CCR 3400)

To avoid unnecessary delay in medical treatment in the event of an employee's serious injury or illness, the Superintendent or designee shall use one or more of the following: (8 CCR 3400)

1. A communication system for contacting a physician or emergency medical service, such as access to 911 or equivalent telephone system. The communication system or the employees using the system shall have the ability to direct emergency services to the location of the injured or ill employee.

2. Readily accessible and available on-site treatment facilities suitable for treatment of reasonably anticipated injury and illness.

(cf. 5141.6 - School Health Services)

3. Proper equipment for prompt medical transport when transportation of injured or ill employees is necessary and appropriate.

(6/91 7/99) 3/10

Administrative Regulation

Work-Related Injuries

AR 4157.1 4257.1, 4357.1

Personnel

In order to provide medical benefits, temporary or permanent disability benefits, wage replacement, retraining or skill enhancement, and/or death benefits in the event that an employee becomes injured or ill in the course of employment, the district shall provide all employees with insurance and workers' compensation benefits in accordance with law. The Superintendent or designee shall develop an efficient claims handling process that reduces costs and facilitates employee recovery.

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

(cf. 4032 - Reasonable Accommodation)

(cf. 4113.4/4213.4/4313.4 - Temporary Modified/Light-Duty Assignment)

(cf. 4154/4254/4354 - Health and Welfare Benefits)

(cf. 4157/4257/4357 - Employee Safety)

(cf. 4157.2/4257.2/4357.2 - Ergonomics)

(cf. 4161.11/4261.11/4361.11 - Industrial Accident/Illness Leave)

The Superintendent or designee shall notify every new employee, at the time of hire or by the end of the first pay period, of his/her right to receive workers' compensation benefits if injured at work. (Labor Code 3551; 8 CCR 15596)

(cf. 4112.9/4212.9/4312.9 - Employee Notifications)

In addition, a notice regarding workers' compensation benefits shall be posted in a conspicuous location frequented by employees, where the notice may be easily read during the workday. (Labor Code 3550)

In the event that an employee is injured or becomes ill in the course of employment, he/she shall report the work-related injury or illness to the Superintendent or designee as soon as practicable.

Within one working day of receiving notice or knowledge of any injury to an employee in the course of employment, the Superintendent or designee shall provide a claim form and notice of potential eligibility for workers' compensation benefits to the employee or, in the case of the employee's death, to his/her dependents. The claim form and notice shall be provided personally or by first class mail. (Labor Code 5401)

The Superintendent or designee shall additionally ensure that any employee who is a victim of a crime that occurred at the place of employment is given written notice personally or by first class mail within one working day of the crime, or when the district reasonably should have known of the crime, that the employee is eligible for workers' compensation benefits for injuries, including psychiatric injuries, that may have resulted from the crime. (Labor Code 3553)

The Superintendent or designee shall ensure that all employee notices described above are in the form prescribed by the Department of Industrial Relations (DIR), Division of Workers Compensation.

Upon learning of a work-related injury or illness, or injury or illness alleged to have arisen out of and in the course of employment, the Superintendent or designee shall report the incident to the district's insurance carrier within five days after obtaining knowledge of the injury or illness. If a subsequent death arises as a result of the reported injury or illness, an amended report indicating the death must be filed with the insurance carrier within five days after being notified of or learning about the death. (Labor Code 6409.1)

In addition, in every case involving death or serious injury or illness, the Superintendent or designee shall immediately make a report by telephone or email to the Division of Occupational Safety and Health. (Labor Code 6409.1)

Legal Reference:

EDUCATION CODE

44984 Industrial accident and illness leaves, certificated employees

45192 Industrial accident and illness leaves, classified employees

LABOR CODE

3200-4855 Workers' compensation, especially:

3550-3553 Employee notice

3600-3605 Conditions of liability

3760 Report of injury to insurer

4600 Provision of medical and hospital treatment by employer

4906 Disclosures and statements

5400-5413 Notice of injury or death

6409.1 Reports

CODE OF REGULATIONS, TITLE 8

15596 Notice of employee rights

Management Resources:

DEPARTMENT OF INDUSTRIAL RELATIONS PUBLICATIONS

A Guidebook for Injured Workers, 2016

Notice to Employees -- Injuries Caused by Work

Time of Hire Pamphlet

Workers' Compensation Claim Form (DWC 1) & Notice of Potential Eligibility

WEB SITES

California Department of Industrial Relations, Division of Occupational Safety and Health:

<http://www.dir.ca.gov/dosh>

California Department of Industrial Relations, Division of Workers Compensation:

<http://www.dir.ca.gov/dwc>

(10/95 7/02) 10/16

Regulation
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Administrative Regulation

Ergonomics

AR 4157.2 4257.2, 4357.2

Personnel

The Superintendent or designee shall implement an ergonomics program to identify risk factors in the work environment that may result in injuries or illnesses to employees and shall design measures to mitigate such risk factors. The program shall include a study of body movements and positions used during work, the tools and equipment used, the physical environment (such as temperature, noise, and lighting), and the organizational environment (such as deadlines, teamwork, and supervision) in order to identify potential causes of stress on the body over time, such as exertion or strain, awkward or sustained posture, or repeated motions.

An employee who experiences pain, numbness, stiffness, swelling, tingling, weakness, or other symptom(s) of a repetitive motion injury (RMI) or other musculoskeletal disorder that may be caused or aggravated by workplace conditions shall report the problem to his/her supervisor.

(cf. 4157.1/4257.1/4357.1 - Work-Related Injuries)

When an RMI which is objectively identified and diagnosed by a licensed physician to be a musculoskeletal injury has been reported by two or more district employees within a 12-month period, and is determined to be predominantly caused by a repetitive job, process, or operation of an identical work activity, the Superintendent or designee shall: (8 CCR 5110)

1. Evaluate each job, process, or operation of identical work activity at the work site, or a representative number of such jobs, processes, or operations of identical work activities, for exposures which have caused RMIs
2. Correct in a timely manner, or minimize to the extent feasible if correction is not possible, any exposures that have caused RMIs, taking into consideration engineering controls such as work station redesign, adjustable fixtures, or tool redesign, and administrative controls such as job rotation, work pacing, or work breaks
3. Provide staff training that includes an explanation of:
 - a. The district's ergonomics program
 - b. The exposures that have been associated with RMIs
 - c. The symptoms and consequences of injuries caused by repetitive motion
 - d. The importance of reporting symptoms and injuries to the district
 - e. Methods used by the district to minimize RMIs

Legal Reference:

EDUCATION CODE

44984 Industrial accident and illness leaves, certificated employees

45192 Industrial accident and illness leaves, classified employees

GOVERNMENT CODE

21153 Employer not to separate for disability members eligible to retire

LABOR CODE

142.3 Adoption, amendment or repeal of standards and orders

3200-4855 Workers' compensation, especially:

3550-3553 Employee notice

3600-3605 Conditions of liability

3760 Report of injury to insurer

4600 Provision of medical and hospital treatment by employer

4906 Disclosures and statements

5400-5404 Notice of injury or death

6303 Place of employment; employment

6305 Occupational safety and health standards; special orders

6310 Retaliation for filing complaint prohibited

6357 Standards for workplace ergonomics

6401.7 Injury prevention programs

6409.1 Reports

CODE OF REGULATIONS, TITLE 8

3203 Injury and Illness Prevention Program

5110 Repetitive motion injuries

Management Resources:

CALIFORNIA DEPARTMENT OF INDUSTRIAL RELATIONS, DIVISION OF
OCCUPATIONAL SAFETY AND HEALTH PUBLICATIONS

Ergonomic Hazards, Fact Sheet H

Guide to Developing Your Workplace Injury and Illness Prevention Program, rev. May 2011

WEB SITES

California Department of Industrial Relations, Division of Occupational Safety and Health:

<http://www.dir.ca.gov/dosh>

(10/97) 7/18

Regulation
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Board Policy

Employee Security

BP 4158 4258, 4358
Personnel

The Governing Board desires to provide a safe and orderly work environment for all employees. As part of the district's comprehensive safety plan, the Superintendent or designee shall develop strategies for protecting employees from potentially dangerous persons and situations and for providing necessary assistance and support when emergency situations occur.

(cf. 0450 - Comprehensive Safety Plan)
(cf. 3515 - Campus Security)
(cf. 5131.4 - Student Disturbances)

Any employee against whom violence or any threat of violence has been directed in the workplace shall notify the Superintendent or designee immediately. As appropriate, the Superintendent or designee shall initiate legal and security measures to protect the employee and others in the workplace.

The Superintendent or designee may pursue legal action on behalf of an employee against a student or his/her parent/guardian to recover damages to the employee or his/her property caused by the student's willful misconduct that occurred on district property, at a school or district activity, or in retaliation for lawful acts of the employee in the performance of his/her duties. (Education Code 48904, 48905)

(cf. 3320 - Claims and Actions Against the District)
(cf. 3515.4 - Recovery for Property Loss or Damage)
(cf. 4156.3/4256.3/4356.3 - Employee Property Reimbursement)
(cf. 5125.2 - Withholding Grades, Diploma or Transcripts)

The Superintendent or designee shall ensure that employees receive training in crisis prevention and intervention techniques in order to protect themselves and students. Staff development may include training in classroom management, effective communication techniques, procedures for responding to an active shooter situation, and crisis resolution.

(cf. 4131 - Staff Development)
(cf. 4231 - Staff Development)
(cf. 4331 - Staff Development)

The Superintendent or designee also shall inform teachers, in accordance with law, of crimes and offenses committed by students who may pose a danger in the classroom. (Education Code 48201, 49079; Welfare and Institutions Code 827)

The Superintendent or designee may make available at appropriate locations, including, but not

limited to, district and school offices, gyms, and classrooms, communication devices that would enable two-way communication with law enforcement and others when emergencies occur.

(cf. 5141 - Health Care and Emergencies)

Use of Pepper Spray

Employees shall not carry or possess pepper spray on school property or at school activities, except when authorized by the Superintendent or designee for self-defense purposes. When allowed, an employee may only possess pepper spray in accordance with administrative regulations and Penal Code 22810. Any employee who is negligent or careless in the possession or handling of pepper spray shall be subject to appropriate disciplinary measures.

(cf. 4118 - Dismissal/Suspension/Disciplinary Action)

(cf. 4218 - Dismissal/Suspension/Disciplinary Action)

Reporting of Injurious Objects

The Board requires employees to take immediate action upon being made aware that any person is in possession of a weapon or unauthorized injurious object on school grounds or at a school-related or school-sponsored activity. The employee shall use his/her own judgment as to the potential danger involved and shall do one of the following:

1. Confiscate the object and deliver it to the principal immediately
2. Immediately notify the principal, who shall take appropriate action
3. Immediately call 911 and the principal

(cf. 3515.7 - Firearms on School Grounds)

(cf. 5131.7 - Weapons and Dangerous Instruments)

(cf. 5144 - Discipline)

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

(cf. 5144.2 - Suspension and Expulsion/Due Process (Students with Disabilities))

When informing the principal about the possession or seizure of a weapon or dangerous device, the employee shall report the name(s) of persons involved, witnesses, location, and the circumstances of any seizure.

Legal Reference:

EDUCATION CODE

32210-32212 Willful disturbance, public schools or meetings

32225-32226 Communication devices

35208 Liability insurance

35213 Reimbursement for loss, destruction or damage of school property
44014 Report of assault by pupil against school employee
44807 Duty concerning conduct of students
48201 Transfer of student records
48900-48926 Suspension or expulsion
49079 Notification to teacher; student who has engaged in acts re: grounds suspension or
expulsion
49330-49335 Injurious objects
CIVIL CODE

51.7 Freedom from violence or intimidation

CODE OF CIVIL PROCEDURE

527.8 Workplace violence safety

GOVERNMENT CODE

995-996.4 Defense of public employees

3543.2 Scope of representation

PENAL CODE

71 Threatening public officers and employees and school officials

240-246.3 Assault and battery, especially:

241.3 Assault against school bus drivers

241.6 Assault on school employee including board member

243.3 Battery against school bus drivers

243.6 Battery against school employee including board member

245.5 Assault with deadly weapon against school employee including board member

290 Registration of sex offenders

601 Trespass by person making credible threat

626-626.11 School crimes

646.9 Stalking

22810 Purchase, possession, and use of tear gas

WELFARE AND INSTITUTIONS CODE

827 Juvenile court proceedings; reports; confidentiality

828.1 District police or security department, disclosure of juvenile records

COURT DECISIONS

City of San Jose v. William Garbett, (2010) 190 Cal. App. 4th 526

Management Resources:

WEB SITES

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

California Department of Education, Safe Schools and Violence Prevention Office:

<http://www.cde.ca.gov/lv/ss>

(7/01 3/11) 5/18

Policy

adopted: August 2018

DEHESA SCHOOL DISTRICT
El Cajon, California

Administrative Regulation

Employee Security

AR 4158 4258, 4358

Personnel

An employee may use reasonable and necessary force for self-defense or defense of another person, to quell a disturbance threatening physical injury to others or damage to property, or to obtain possession of weapons or other dangerous objects within the control of a student. (Education Code 44807, 49001)

(cf. 5131.7 - Weapons and Dangerous Instruments)
(cf. 5144 - Discipline)

An employee shall promptly report to the principal or other immediate supervisor any attack, assault, or physical threat made against him/her by a student or by any other individual in relation to the employee's performance of his/her duties, and any action the employee took in response. When appropriate, the employee and the principal or other immediate supervisor shall report the incident to law enforcement.

(cf. 3515.2 - Disruptions)

Reports of attack, assault, or threat shall be forwarded immediately to the Superintendent or designee.

(cf. 3320 - Claims and Actions Against the District)
(cf. 3515.4 - Recovery for Property Loss or Damage)
(cf. 3530 - Risk Management/Insurance)

Notice Regarding Student Offenses Committed While Under School Jurisdiction

The Superintendent or designee shall inform the teacher(s) of each student who, during the previous three school years, has engaged in or is reasonably suspected to have engaged in any act, except the possession or use of tobacco products, that would constitute a ground for suspension or expulsion as specified in AR 5144.1 - Suspension and Expulsion/Due Process. This information shall be based upon district records maintained in the ordinary course of business or records received from a law enforcement agency. (Education Code 49079)

(cf. 5125 - Student Records)
(cf. 5144.1 - Suspension and Expulsion/Due Process)

Upon receiving a transfer student's record regarding acts committed by the student that resulted in his/her suspension or expulsion, the Superintendent or designee shall inform the student's teacher(s) that the student was suspended from school or expelled from his/her former district

and of the act that resulted in the suspension or expulsion. (Education Code 48201)

Information received by teacher(s) shall be received in confidence for the limited purpose for which it was provided and shall not be further disseminated by the teacher. (Education Code 49079)

Notice Regarding Student Offenses Committed While Outside School Jurisdiction

When informed by the court that a minor student has been found by a court to have committed any felony or any misdemeanor involving curfew, gambling, alcohol, drugs, tobacco products, carrying of weapons, a sex offense listed in Penal Code 290, assault or battery, larceny, vandalism, or graffiti, the Superintendent or designee shall so inform the school principal. (Welfare and Institutions Code 827)

The principal shall disseminate this information to any counselor who directly supervises or reports on the student's behavior or progress. The principal shall also inform any teacher or administrator directly supervising or reporting on the student's behavior or progress whom he/she thinks may need the information so as to work with the student appropriately, avoid being needlessly vulnerable, or protect others from vulnerability. (Welfare and Institutions Code 827)

Any court-initiated information that a teacher, counselor, or administrator receives shall be kept confidential and used only to rehabilitate the student and protect other students and staff. The information shall be further disseminated only when communication with the student, parent/guardian, law enforcement staff, and probation officer is necessary to rehabilitate the student or to protect students and staff. (Welfare and Institutions Code 827)

When a student is removed from school as a result of his/her offense, the Superintendent shall hold the court's information in a separate confidential file until the student is returned to the district. If the student is returned to a different district, the Superintendent shall transmit the information provided by the student's parole or probation officer to the superintendent of the new district of attendance. (Welfare and Institutions Code 827)

Any confidential file of court-initiated information shall be kept until the student becomes 18, graduates from high school, or is released from juvenile court jurisdiction, whichever occurs first, and shall then be destroyed. (Welfare and Institutions Code 827)

Procedures to Maintain Confidentiality of Student Offenses

In order to maintain confidentiality when providing information about student offenses to counselors and teachers of classes/programs to which a student is assigned, the principal or designee shall send the staff member a written notification that one of his/her students has committed an offense that requires his/her review of a student's file in the school office. This notice shall not name or otherwise identify the student. The staff member may be asked to initial the notification and return it to the principal or designee. He/she may also initial the student's file when reviewing it in the school office.

Use of Pepper Spray

The Superintendent or designee shall notify employees of the district's policy prohibiting the possession of pepper spray on school property or at school-related activities without prior approval of the Superintendent or designee. Employees wishing to carry pepper spray shall submit to the Superintendent or designee a written request setting forth the need for the pepper spray. The Superintendent or designee shall notify the employee in writing as to whether the request was approved or denied.

When approving an employee's request, the Superintendent or designee shall inform the employee of the following conditions:

1. The pepper spray shall be used only in self-defense.
2. An employee who uses pepper spray other than in self-defense shall be subject to disciplinary action by the district and, in accordance with law, a fine and/or imprisonment.

(cf. 4118 - Dismissal/Suspension/Disciplinary Action)

(cf. 4218 - Dismissal/Suspension/Disciplinary Action)

3. The pepper spray must be stored in a secure place and not be accessible to students or other individuals. Negligent storage of the pepper spray may subject the employee to disciplinary action.

(11/00 3/11) 5/18

Board Policy

Employee Assistance Programs

BP 4159 4259,4359

Personnel

The Governing Board recognizes that school district employees may have problems which can have detrimental effects upon job performance and student safety. The Board encourages employees to seek help when such problems exist and to take advantage of the resources that are available to assist them.

Employees shall have confidential access to information about the district's employee assistance program. This information shall be available to all employees and their spouses and dependents.

(cf. 3513.3 - Tobacco-Free Schools)
(cf. 4020 - Drug and Alcohol-Free Workplace)
(cf. 5131.62 - Tobacco)

Management and supervisory staff shall be knowledgeable about the district's employee assistance program and may counsel employees about the program, as appropriate.

Participation in the assistance program shall not jeopardize an employee's employment or career advancement, nor will it protect the employee from disciplinary action for substandard job performance.

(cf. 4032 - Reasonable Accommodation)
(cf. 4115 - Evaluation/Supervision)
(cf. 4118 - Dismissal/Suspension/Disciplinary Action)
(cf. 4161/4261/4361 - Leaves)
(cf. 4161.1/4361.1 - Personal Illness/Injury Leave)
(cf. 4161.8/4261.8/4361.8 - Family Care and Medical Leave)
(cf. 4161.9/4261.9/4361.9 - Catastrophic Leave Program)
(cf. 4215 - Evaluation/Supervision)
(cf. 4218 - Dismissal/Suspension/Disciplinary Action)
(cf. 4261.1 - Personal Illness/Injury Leave)
(cf. 4315 - Evaluation/Supervision)

Legal Reference:

EDUCATION CODE

35160 Authority of governing board

35160.1 Broad authority of school districts

44962 Leaves of absence for certificated employees

44964 Power to grant leaves of absence for accident, illness or quarantine

45190-45209 Resignations and leaves of absence for classified employees
GOVERNMENT CODE
8355 Certification to contracting or granting agency; requisites
HEALTH AND SAFETY CODE
104420 Providing information re: smoking cessation program
UNITED STATES CODE, TITLE 41
8101-8106 Drug-Free Workplace Act

(7/86 3/92) 7/02

Policy
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Board Policy

Leaves

BP 4161 4261,4361

Personnel

The Governing Board shall provide for paid and unpaid leaves of absence for employees in accordance with law, Board policy, administrative regulation, collective bargaining agreements, and merit system rules, as applicable.

(cf. 4141/4241 - Collective Bargaining Agreement)

(cf. 4161.9/4261.9/4361.9 - Catastrophic Leave Program)

The Board recognizes the following justifiable reasons for employee absence:

1. Personal illness or injury

(cf. 4161.1/4361.1 - Personal Illness/Injury Leave)

(cf. 4261.1 - Personal Illness/Injury Leave)

2. Industrial accident or illness

(cf. 4161.11/4261.11/4361.11 - Industrial Accident/Illness Leave)

3. Family care and medical leave

(cf. 4161.8/4261.8/4361.8 - Family Care and Medical Leave)

4. Military service

(cf. 4161.5/4261.5/4361.5 - Military Leave)

5. Personal necessity and personal emergencies

(cf. 4161.2/4261.2/4361.2 - Personal Leaves)

6. Disability leave for certificated employees in accordance with Education Code 44986

7. Vacations for classified staff and certificated management staff, as applicable

8. Sabbaticals for purposes of study or training related to the employee's job duties

(cf. 4161.3 - Professional Leaves)

(cf. 4261.3 - Professional Leaves)

9. Attendance at work-related meetings and staff development opportunities

(cf. 4131 - Staff Development)
(cf. 4231 - Staff Development)
(cf. 4331 - Staff Development)

10. Compulsory leave

(cf. 4118 - Dismissal/Suspension/Disciplinary Action)
(cf. 4218 - Dismissal/Suspension/Disciplinary Action)

Long-Term Leaves

With Board approval, an employee may receive a leave of absence, without pay and without accruing seniority or service credit, for a period of up to one school year. Applications for long-term leave shall be made in writing and shall state the purpose for which leave is requested. All long-term leave agreements shall be in writing and shall state the terms and conditions of the leave, including the conditions governing the employee's return.

At the end of a long-term leave, the employee shall be reinstated to a similar position as that held at the time leave was granted, unless otherwise agreed upon.

The Board shall consider any written request by an employee to return to work prior to the expiration date of the leave.

Administrative and Supervisory Personnel

Certificated administrative and supervisory employees who are not subject to the district's bargaining agreement for certificated employees shall generally be entitled to those leave provisions provided in the bargaining agreement for other certificated employees unless otherwise specified in individual contract, memorandums of understanding, Board policy, administrative regulation, or law.

Classified administrative and supervisory employees who are not subject to the district's bargaining agreement for classified employees shall generally be entitled to those leave provisions provided in the bargaining agreement for other classified employees unless otherwise specified in individual contract, memoranda of understanding, Board policy, administrative regulation, or law.

(cf. 2121 - Superintendent's Contract)
(cf. 4300 - Administrative and Supervisory Personnel)
(cf. 4312.1 - Contracts)

Legal Reference:
EDUCATION CODE

22850-22856 Pension benefits, STRS members on military leave
44018 Compensation for employees on active military duty
44036-44037 Leaves of absence for judicial and official appearances
44043.5 Catastrophic leave
44800 Effect of active military service on status of employees
44842 Failure to provide notice or to report to work
44940 Sex offenses and narcotic offenses; compulsory leave of absence
44962-44988 Leaves of absence (certificated)
45059 Employee ordered to active military/naval duty, computation of salary
45190-45210 Leaves of absence (classified)

FAMILY CODE

297-297.5 Registered domestic partner rights, protections and benefits

GOVERNMENT CODE

3543.1 Release time for representatives of employee organizations

3543.2 Scope of representation

12945.1-12945.2 California Family Rights Act

20990-21013 Pension benefits, PERS members on military leave

LABOR CODE

230-230.2 Leaves for victims of domestic violence, sexual assault or specified felonies

230.3 Leave for emergency personnel

230.4 Leave for volunteer firefighters

230.8 Leave to visit child's school

233 Illness of child, parent, spouse or domestic partner

MILITARY AND VETERANS CODE

395-395.9 Military leave

395.10 Leave when spouse on leave from military deployment

UNITED STATES CODE, TITLE 29

2601-2654 Family and Medical Leave Act of 1993

UNITED STATES CODE, TITLE 38

4301-4334 Uniformed Services Employment and Reemployment Rights Act of 1994

(12/88 10/98) 7/08

Policy
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Administrative Regulation

Personal Illness/Injury Leave

AR 4161.1 4361.1

Personnel

Certificated employees employed five school days per week are entitled to 10 days' leave of absence with full pay for personal illness or injury (sick leave) per school year of service. Employees who work less than five school days per week (part-time employees) shall be granted sick leave in proportion to the time they work. However, any part-time employee who is entitled to less than three days of paid sick leave per year due to the amount of time worked shall be granted sick leave pursuant to Labor Code 246, if he/she is eligible. (Education Code 44978; Labor Code 245-249)

(cf. 4161/4261/4361 - Leaves)

(cf. 4161.9/4261.9/4361.9 - Catastrophic Leave Program)

Use of Sick Leave

Certificated employees may use sick leave for absences due to:

1. Accident or illness, whether or not the absence arises out of or in the course of employment; quarantine which results from contact with other persons having a contagious disease during the employee's performance of his/her duties; or temporary inability to perform assigned duties because of illness, accident, or quarantine (Education Code 44964)

(cf. 4157.1/4257.1/4357.1 - Work-Related Injuries)

2. Pregnancy, miscarriage, childbirth, and related recovery (Education Code 44965, 44978)

(cf. 4161.8/4261.8/4361.8 - Family Care and Medical Leave)

3. Personal necessity (Education Code 44981)

(cf. 4161.2/4261.2/4361.2 - Personal Leaves)

4. Medical and dental appointments, in increments of not less than one hour

5. Industrial accidents or illnesses when leave granted specifically for that purpose has been exhausted (Education Code 44984)

(cf. 4161.11/4261.11/4361.11 - Industrial Accident/Illness Leave)

6. Need of the employee to bond with a child within one year of the child's birth, adoption, or foster care placement (parental leave) (Education Code 44977.5; Government Code 12945.2,

12945.6; 29 USC 2612; 29 CFR 825.112)

7. Need of the employee or his/her family member, as defined in Labor Code 245.5, for the diagnosis, care, or treatment of an existing health condition or for preventive care (Labor Code 233, 246.5)

8. Need of the employee to seek or obtain any relief or medical attention specified in Labor Code 230(c) and/or 230.1(a) for the health, safety, or welfare of the employee or his/her child, when the employee has been a victim of domestic violence, sexual assault, or stalking (Labor Code 233, 246.5)

For the purposes specified in items #7-8, an employee may use, in any calendar year, the amount of sick leave he/she would accrue during six months at his/her current rate of entitlement. (Labor Code 233)

An employee may take sick leave at any time during the school year, even if credit for sick leave has not yet been accrued. (Education Code 44978)

An employee shall reimburse the district for any unearned sick leave used as of the date of his/her termination.

Unused days of sick leave shall be accumulated from year to year without limitation. (Education Code 44978)

At the beginning of each school year, employees shall be notified of the amount of sick leave they have accumulated.

The district shall not require new employees to waive leave accumulated in a previous district. (Education Code 44979, 44980)

The Superintendent or designee shall notify any certificated employee who leaves the district after at least one school year of employment that if the employee accepts a certificated position in another district, county office of education, or community college district within one year, he/she may request that the district transfer his/her accumulated sick leave to the new employer. (Education Code 44979, 44980)

Additional Leave for Disabled Military Veterans

In addition to any other entitlement for sick leave with pay, a certificated employee who is a former active duty member of the U.S. Armed Forces or a former or current member of the California National Guard or a federal reserve component shall be entitled to sick leave with pay of up to 10 days for the purpose of undergoing medical treatment, including mental health treatment, for a military service-connected disability rated at 30 percent or more by the U.S. Department of Veterans Affairs. An eligible employee who works less than five days per week shall be entitled to such leave in proportion to the time he/she works. (Education Code 44978.2)

The amount of leave shall be credited to the employee either on the date the employee receives confirmation of the submission of his/her disability application to the U.S. Department of Veterans Affairs or on the first day the employee begins or returns to employment after active duty, whichever is later. When the employee receives his/her disability rating decision, he/she shall report that information to the Superintendent or designee. If the disability rating decision makes the employee eligible for the leave, the time used before the decision shall be counted toward the 10-day maximum leave. If the disability rating decision makes the employee ineligible for the leave, the district may change the sick leave time used before the disability rating decision to an alternative leave balance. (Education Code 44978.2)

The Superintendent or designee may require verification, in accordance with the section "Verification Requirements" below, that the employee used the leave to obtain treatment of a military service-connected disability.

Leave for military-service connected disability shall be available for 12 months following the first date that the leave was credited. Leave not used during the 12-month period shall not be carried over and shall be forfeited. (Education Code 44978.2)

Notification of Absence

An employee shall notify the district of his/her need to be absent as soon as such need is known, so that substitute services may be secured. This notification shall include an estimate of the expected duration of absence. If the absence becomes longer than estimated, the employee shall so notify the district. If the duration of absence becomes shorter than estimated, the employee shall notify the district not later than three o'clock in the afternoon of the day preceding the day on which he/she intends to return to work. If the employee fails to notify the district and the failure results in a substitute being secured, the cost of the substitute shall be deducted from the employee's pay.

(cf. 4121 - Temporary/Substitute Personnel)

Continued Absence After Available Sick Leave Is Exhausted/Differential Pay

After a certificated employee has exhausted all available sick leave, including all accumulated sick leave, and, due to illness or accident, continues to be absent for an additional period of up to five months, he/she shall receive 50 percent of his/her regular salary during the additional period of absence. (Education Code 44983)

Absence Beyond Five-Month Period/Reemployment List

If a certificated employee is not medically able to resume his/her duties after the five-month period provided pursuant to Education Code 44977, the employee shall be placed either in another position or on a reemployment list. Placement on the reemployment list shall be for 24 months for probationary employees or 39 months for permanent employees and shall begin at the expiration of the five-month period. If during this time the employee becomes medically able, he/she shall be returned to employment in a position for which he/she is credentialed and

qualified. (Education Code 44978.1)

(cf. 4116 - Probationary/Permanent Status)

Parental Leave

During each school year, a certificated employee may use all available sick leave, including accumulated sick leave, for the purpose of parental leave for a period up to 12 work weeks. The 12-week period shall be reduced by any period of sick leave, including accumulated sick leave, taken during a period of such parental leave. (Education Code 44977.5)

Eligibility for such leave shall not require 1,250 hours of service with the district during the previous 12 months. (Education Code 44977.5)

An employee who has exhausted all available sick leave, including accumulated sick leave, and continues to be absent on account of parental leave shall receive differential pay for the remainder of the 12 work weeks. (Education Code 44977.5)

Parental leave taken pursuant to Education Code 44977.5 shall run concurrently with the parental leave taken pursuant to Government Code 12945.2 or 12945.6, and the aggregate amount of parental leave shall not exceed 12 work weeks in a 12-month period. (Education Code 44977.5; Government Code 12945.2, 12945.6)

Verification Requirements

After any absence due to illness or injury, the employee shall verify the absence by submitting a completed and signed district absence form to his/her immediate supervisor.

The Superintendent or designee may require verification whenever an employee's absence record shows chronic absenteeism or a pattern of absences immediately before or after weekends and/or holidays or whenever available evidence clearly indicates that an absence is not related to illness or injury.

In addition, the Superintendent or designee may require an employee to visit a physician selected by the district, at district expense, in order to receive a report on the medical condition of the employee. The report shall include a statement as to the employee's need for further leave of absence and a prognosis as to when the employee will be able to return to work. If the report concludes that the employee's condition does not warrant continued absence, the Superintendent or designee may, after giving notice to the employee, deny further leave.

Any district request for additional verification by an employee's physician or a district-selected physician shall be in writing and shall specify that the report to be submitted to the district should not contain the employee's genetic information.

Any genetic information received by the district on behalf of an employee shall be treated as a confidential medical record, maintained in a file separate from the employee's personnel file, and

shall not be disclosed except in accordance with 29 CFR 1635.9.

Before returning to work, an employee who has been absent for surgery, hospitalization, or extended medical treatment may be asked to submit a letter from his/her physician stating that he/she is able to return to duty and stipulating any necessary restrictions or limitations.

(cf. 4032 - Reasonable Accommodation)

(cf. 4113.4/4213.4/4313.4 - Temporary Modified/Light-Duty Assignment)

Healthy Workplaces, Healthy Families Act Requirements

No employee shall be denied the right to use accrued sick days, and the district shall not in any manner discriminate or retaliate against an employee for using or attempting to use sick leave, filing a complaint with the Labor Commissioner, or alleging district violation of Labor Code 245-249.

To ensure the district's compliance with Labor Code 245-249, the Superintendent or designee shall:

1. At a conspicuous location in each workplace, display a poster on paid sick leave that includes the following information:
 - a. That an employee is entitled to accrue, request, and use paid sick days
 - b. The amount of sick days provided by Labor Code 245-249
 - c. The terms of use of paid sick days
 - d. That discrimination or retaliation against an employee for requesting and/or using sick leave is prohibited by law and that an employee has the right to file a complaint with the Labor Commissioner if the district discriminates or retaliates against him/her
2. Provide at least 24 hours or three days of paid sick leave to each eligible employee to use per year and allow eligible employees to use accrued sick leave upon reasonable request
3. Provide eligible employees written notice, on their pay stub or other document issued with their pay check, of the amount of paid sick leave they have available

(cf. 4112.9/4212.9/4312.9 - Employee Notifications)

4. Keep a record documenting the hours worked and paid sick days accrued and used by each eligible employee for three years

Legal Reference:

EDUCATION CODE

- 44964 Power to grant leave of absence in case of illness, accident, or quarantine
- 44965 Granting of leaves of absence for pregnancy and childbirth
- 44976 Transfer of leave rights when school is transferred to another district
- 44977 Salary deduction during absence from duties up to five months after sick leave is exhausted
- 44977.5 Differential pay during parental leave up to 12 weeks after sick leave is exhausted
- 44978 Provisions for sick leave of certificated employees
- 44978.1 Inability to return to duty; placement in another position or on reemployment list
- 44978.2 Leave for military service connected disability
- 44979 Transfer of accumulated sick leave to another district
- 44980 Transfer of accumulated sick leave to a county office of education
- 44981 Leave of absence for personal necessity
- 44983 Exception to sick leave when district adopts specific rule
- 44984 Industrial accident or illness
- 44986 Leave of absence for disability allowance applicant

GOVERNMENT CODE

- 12945.1-12945.2 California Family Rights Act
- 12945.6 Parental leave

LABOR CODE

- 220 Sections inapplicable to public employees
- 230 Jury duty; legal actions by domestic violence, sexual assault and stalking victims, right to time off
- 230.1 Employers with 25 or more employees; domestic violence, sexual assault and stalking victims, right to time off
- 233 Illness of child, parent, spouse or domestic partner
- 234 Absence control policy
- 245-249 Healthy Workplaces, Healthy Families Act of 2014

CODE OF REGULATIONS, TITLE 5

- 5601 Transfer of accumulated sick leave

UNITED STATES CODE, TITLE 29

- 2601-2654 Family and Medical Leave Act of 1993, as amended

UNITED STATES CODE, TITLE 42

- 2000ff-2000ff-11 Genetic Information Nondiscrimination Act of 2008

CODE OF FEDERAL REGULATIONS, TITLE 29

- 825.100-825.800 Family and Medical Leave Act of 1993
- 1635.1-1635.12 Genetic Information Nondiscrimination Act of 2008

COURT DECISIONS

- Veguez v. Governing Board of Long Beach Unified School District, (2005) 127 Cal.App.4th 406

(3/16 3/17) 3/18

Regulation
adopted: June 2018

DEHESA SCHOOL DISTRICT
El Cajon, California

Administrative Regulation

Industrial Accident/Illness Leave

AR 4161.11 4261.11,4361.11

Personnel

An eligible employee shall be entitled to a leave of absence for an industrial accident or illness arising in the course of his/her assigned duties. (Education Code 44984, 45192)

(cf. 4113.4/4213.4/4313.4 - Temporary Modified/Light-Duty Assignment)

(cf. 4157/4257/4357 - Employee Safety)

(cf. 4157.1/4257.1/4357.1 - Work-Related Injuries)

(cf. 4157.2/4257.2/4357.2 - Ergonomics)

(cf. 4161/4261/4361 - Leaves)

For such leave, the employee shall be granted no more than 60 working days in any one fiscal year for the same industrial accident or illness.

To be eligible for industrial accident or illness leave, a classified employee shall have served in the district continuously for at least three years.

Allowable industrial accident or illness leave shall not be accumulated from year to year. (Education Code 44984, 45192)

When an employee is absent from his/her duties because of an industrial accident or illness: (Education Code 44043, 44044, 44984, 45192)

1. The leave shall start on the first day of absence.
2. During the period of absence, the employee shall be paid such portion of his/her wage or salary that, when added to the award granted under state workers' compensation laws, will not exceed his/her normal wage or salary.
3. The leave shall be reduced by one day for each day of authorized absence, regardless of an award granted under workers' compensation laws.
4. When the leave overlaps into the next fiscal year, the employee is entitled to only the amount of unused leave due the employee for the same illness or injury.

During any paid leave of absence, the employee shall retain any workers' compensation check received on account of an industrial accident or illness. The employee shall notify the Superintendent or designee that he/she has received such check. The Superintendent or designee shall then issue payment of the employee's normal wage or salary less an amount equivalent to the face amount of the workers' compensation check and other appropriate deductions, including, but not limited to, employee retirement contributions. Employee benefits shall be computed on the basis of the employee's regular wage or salary prior to the deduction of any amounts for

temporary disability payments. (Education Code 44044)

Absence for industrial accident or illness shall not be considered a break in service of the employee. An employee using such leave shall retain all status and benefits to which he/she would otherwise be entitled.

(cf. 4116 - Probationary/Permanent Status)
(cf. 4154/4254/4354 - Health and Welfare Benefits)
(cf. 4216 - Probationary/Permanent Status)

When available industrial accident or illness leave has been exhausted, the employee shall be so notified in writing and shall be offered an opportunity to request any additional paid or unpaid leave available to the employee. (Education Code 45192)

(cf. 4112.9/4212.9/4312.9 - Employee Notifications)

Upon expiration of allowable leave for an industrial accident or illness, the employee may use personal illness and injury leave provided pursuant to Education Code 44977, 44978, 44983, or 45191, as applicable, provided that such leave, when added to any continuing workers' compensation award, does not result in a payment to the employee of more than his/her full wage or salary. (Education Code 44984, 45192)

(cf. 4161.1/4361.1 - Personal Illness/Injury Leave)
(cf. 4261.1 - Personal Illness/Injury Leave)

If a certificated employee is unable to resume the duties of his/her position after exhausting all accumulated sick leave, including the consecutive five-month period provided by Education Code 44977, he/she shall, if not placed in another position, be placed on a reemployment list for a period of 24 months if he/she is a probationary employee or 39 months if he/she is a permanent employee. If the employee becomes medically able to resume duties during the period of reemployment eligibility, he/she shall be returned to employment in a position for which he/she is credentialed and qualified. (Education Code 44978.1)

If a classified employee has exhausted all available leaves of absence, paid or unpaid, and is not medically able to resume the duties of his/her position, he/she shall, if not placed in another position, be placed on a reemployment list for a period of 39 months. If he/she becomes medically able to resume duties during the period of reemployment eligibility, he/she shall be employed in a vacant position in the class of his/her previous assignment over all other candidates except those on a reemployment list established because of lack of work or lack of funds, in which case the employee shall be listed in accordance with seniority regulations. If the employee is medically released to return to duty but fails to accept an appropriate assignment, he/she shall be dismissed. (Education Code 45192)

(cf. 4217.3 - Layoff/Rehire)
(cf. 4218 - Dismissal/Suspension/Disciplinary Action)

Legal Reference:

EDUCATION CODE

44043 Temporary disability

44044 Temporary disability checks; waiver of endorsement to district

44977 Salary deductions during absence from duties

44978 Provisions for certificated employee sick leave

44978.1 Inability of certificated employee to return to duty; placement in another position or on reemployment list

44983 Exception to sick leave

44984 Industrial accident and illness leave, certificated employees

45191 Personal illness and injury leave, classified employees

45192 Industrial accident and illness leave, classified employees

LABOR CODE

3200-6002 Workers' compensation

Management Resources:

WEB SITES

Department of Industrial Relations: <http://www.dir.ca.gov>

(10/98 8/13) 10/15

Administrative Regulation

Personal Leaves

AR 4161.2 4261.2,4361.2

Personnel

Personal leaves granted to district employees shall be used as permitted in this administrative regulation, other Board-approved policy or district regulation, or applicable collective bargaining agreement.

For the purpose of any personal leave offered pursuant to state law, a registered domestic partner shall have the same rights, protections, and benefits as a spouse and protections provided to a spouse's child shall also apply to a child of a registered domestic partner. (Family Code 297.5)

Whenever possible, employees shall request personal leaves in advance and prepare suitable instructions, including lesson plans as applicable, for a substitute employee.

(cf. 4121 - Temporary/Substitute Personnel)

Bereavement

Employees are entitled to a leave of up to three days, or five days if out-of-state travel is required, upon the death of any member of the employee's immediate family. No deduction shall be made from the employee's salary, nor shall such leave be deducted from any other leave to which the employee is entitled. (Education Code 44985, 45194)

(cf. 4161/4261/4361 - Leaves)

Members of the immediate family include: (Education Code 44985, 45194)

1. The mother, father, grandmother, grandfather, or grandchild of the employee or of the employee's spouse
2. The employee's spouse, son, son-in-law, daughter, daughter-in-law, brother, or sister
3. Any relative living in the employee's immediate household

At the employee's request, bereavement leave may be extended under personal necessity leave provisions as provided in the section "Personal Necessity" below. (Education Code 44981, 45207)

Personal Necessity

Employees may use a maximum of seven days of their accrued personal illness/injury leave (sick leave) during each school year for reasons of personal necessity. (Education Code 44981, 45207)

(cf. 4161.1/4361.1 - Personal Illness/Injury Leave)

(cf. 4261.1 - Personal Illness/Injury Leave)

Acceptable reasons for the use of personal necessity leave include:

1. Death of a member of the employee's immediate family when the number of days of absence exceeds the limits set by bereavement leave provisions (Education Code 44981, 45207)
2. An accident involving the employee or his/her property or the person or property of a member of the employee's immediate family (Education Code 44981, 45207)
3. Illness, preventive care, or other need of a member of the employee's family, as defined in Labor Code 245.5 (Education Code 44981; Labor Code 246.5)

(cf. 4161.8/4261.8/4361.8 - Family Care and Medical Leave)

4. A classified employee's appearance in any court or before any administrative tribunal as a litigant, party, or witness under subpoena or other order (Education Code 45207)
5. Fire, flood, or other immediate danger to the home of the employee
6. Personal business of a serious nature which the employee cannot disregard

Leave for personal necessity may be allowed for other reasons at the discretion of the Superintendent or designee. However, personal necessity leave shall not be granted for purposes of personal convenience, for the extension of a holiday or vacation, or for matters which can be taken care of outside of working hours. The Superintendent or designee shall have final discretion as to whether or not a request reflects personal necessity.

Advance permission shall not be required of an employee in any case involving the death of a member of the employee's immediate family, an accident involving the employee's person or property or the person or property of a member of his/her immediate family, or the illness, preventive care, or other need of a member of the employee's family. (Education Code 44981, 45207)

For any leave that is planned, or where the need for leave is foreseeable, an employee shall notify the Superintendent or designee in advance. In all other circumstances, the employee shall notify the Superintendent or designee of the need for the leave as soon as practicable.

After any absence due to personal necessity, the employee shall verify the absence by submitting a completed and signed district absence form to his/her immediate supervisor.

Legal Duties

An employee may take time off work in order to: (Labor Code 230)

1. Serve on an inquest jury or trial jury
2. Comply with a subpoena or other court order to appear as a witness

Notices, summons, and subpoenas for court appearances shall be submitted to the district office when requesting leave.

A classified employee called for jury duty shall be granted leave with pay up to the amount of the difference between his/her regular earnings and any amount received for jury fees. (Education Code 44037)

A certificated employee who is called for jury duty also shall be granted leave with pay up to the difference between his/her regular earnings and any jury fees he/she received.

An employee shall be granted leave with pay to appear in court as a witness other than a litigant or to respond to an official order from another governmental jurisdiction for reasons not brought about through the connivance or misconduct of the employee. Such an employee shall receive the difference between his/her regular earnings and any witness fees he/she received.

Leaves for Crime Victims

An employee may be absent from work in order to attend judicial proceedings related to a crime when he/she is a victim, or an immediate family member, registered domestic partner, or child of a registered domestic partner of a victim, of any of the following crimes: (Labor Code 230.2)

1. A violent felony as defined in Penal Code 667.5(c)
2. A serious felony as defined in Penal Code 1192.7(c)
3. A felony provision of law proscribing theft or embezzlement

For these purposes, the employee may use vacation, personal leave, personal illness/injury leave, unpaid leave, or compensatory time off that is otherwise available to the employee. (Labor Code 230.2)

Prior to taking time off, an employee shall give his/her supervisor a copy of the notice of each scheduled proceeding that is provided by the responsible agency, unless advance notice is not feasible. When advance notice is not feasible or an unscheduled absence occurs, the employee shall, within a reasonable time after the absence, provide documentation evidencing the judicial proceeding from the court or government agency setting the hearing, the district attorney or prosecuting attorney's office, or the victim/witness office that is advocating on behalf of the victim. (Labor Code 230.2)

The district shall keep confidential any records pertaining to the employee's absence from work by reason of this leave. (Labor Code 230.2)

Leaves for Victims of Domestic Violence, Sexual Assault and Stalking

An employee who is a victim of domestic violence, sexual assault, or stalking as defined by law may use vacation, sick leave, personal leave, or compensatory time off that is otherwise available to him/her under the terms of his/her employment to attend to the following activities: (Labor Code 230, 230.1, 246.5)

1. Obtain or attempt to obtain any relief, including, but not limited to, a temporary restraining order, restraining order, or other injunctive relief to help ensure the health, safety, or welfare of the employee or his/her child
2. Seek medical attention for injuries caused by domestic violence, sexual assault, or stalking
3. Obtain services from a domestic violence shelter, program, or rape crisis center as a result of domestic violence, sexual assault, or stalking
4. Obtain psychological counseling related to an experience of domestic violence, sexual assault, or stalking
5. Participate in safety planning and take other actions to increase safety from future domestic violence, sexual assault, or stalking, including temporary or permanent relocation

Prior to taking time off, an employee shall give reasonable notice to his/her supervisor, unless advance notice is not feasible. When an unscheduled absence occurs, the employee shall provide, within a reasonable period of time, certification of the absence in the form of any of the following: (Labor Code 230, 230.1)

1. A police report indicating that the employee was a victim of domestic violence, sexual assault, or stalking
2. A court order protecting or separating the employee from the perpetrator of an act of domestic violence, sexual assault, or stalking, or other evidence from the court or prosecuting attorney that the employee has appeared in court
3. Documentation from a domestic violence or sexual assault counselor as defined in Evidence Code 1037.1 or 1035.2, licensed medical professional or health care provider, or counselor that the employee was undergoing treatment for physical or mental injuries or abuse resulting in victimization from an act of domestic violence, sexual assault, or stalking

The district shall maintain the confidentiality of such an employee to the extent authorized by law. (Labor Code 230, 230.1)

Personal Leave for Child-Related Activities

Any employee who is a parent/guardian of one or more children of an age to attend any of grades

K-12 or a program offered by a licensed child care provider may use up to 40 hours of personal leave, vacation, or compensatory time off each school year in order to: (Labor Code 230.8)

1. Find, enroll, or reenroll his/her child in a school or with a licensed child care provider or to participate in activities of the school or child care provider, provided the employee gives reasonable advance notice of the absence. Time off for this purpose shall not exceed eight hours in any calendar month.
2. Address a school or child care emergency, provided the employee gives notice. An emergency exists when the child cannot remain in school or with a child care provider due to one of the following circumstances:
 - a. A request by the school or child care provider that the child be picked up
 - b. An attendance policy, excluding planned holidays, that prohibits the child from attending or requires that the child be picked up from the school or child care provider
 - c. Behavioral or discipline problems
 - d. Closure or unexpected unavailability of the school or child care provider, excluding planned holidays
 - e. A natural disaster, including, but not limited to, fire, earthquake, or flood

(cf. 5148 - Child Care and Development)

For purposes of this leave, parent/guardian includes a parent, guardian, stepparent, foster parent, grandparent, or person who stands in loco parentis to a child. (Labor Code 230.8)

In lieu of using vacation, personal leave, or compensatory time off, eligible employees may take unpaid leave for this purpose.

If two or more parent/guardian of a child are employed at the same work site, this leave shall be allowed for the parent/guardian who first gives notice to the district. Simultaneous absence by another parent/guardian of the child may be granted by the Superintendent or designee. (Labor Code 230.8)

Upon request by the Superintendent or designee, the employee shall provide documentation from the school or licensed child care provider that he/she engaged in permitted child-related activities on a specific date and at a particular time. (Labor Code 230.8)

Service on Education Boards and Committees

Upon request, a certificated employee shall be granted up to 20 school days of paid leave per school year for service performed within the state on any education board, commission, committee, or group authorized by Education Code 44987.3 provided that all of the following

conditions are met: (Education Code 44987.3)

1. The service is performed within the state.
2. The board, commission, organization, or group informs the district in writing of the service.
3. The board, commission, organization, or group agrees, prior to the service, to reimburse the district, upon the district's request, for compensation paid to the employee's substitute and for actual related administrative costs.

Employee Organization Activities

Upon request, any certificated or classified employee shall be granted a leave of absence without loss of compensation to serve as an elected officer of a district employee organization or any statewide or national employee organization with which the employee organization is affiliated. The leave shall include, but is not limited to, absence for purposes of attending periodic, stated, special, or regular meetings of the body of the organization. (Education Code 44987, 45210)

(cf. 4140/4240/4340 - Bargaining Units)

(cf. 4143/4243 - Negotiations)

Upon request of an employee organization in the district or its state or national affiliate, a reasonable number of unelected classified employees shall be granted a leave of absence without loss of compensation for the purpose of attending important organizational activities authorized by the organization. The employee organization shall provide reasonable notification to the Superintendent or designee when requesting a leave of absence for employees for this purpose. (Education Code 45210)

When leave is granted for any of the above purposes, the employee organization shall reimburse the district within 10 days after receiving the district's certification of payment of compensation to the employee. (Education Code 44987, 45210)

Religious Leave

The Superintendent or designee shall deduct the cost of hiring a substitute, when required, from the wages of the employee who takes religious leave.

No employee shall be discriminated against for using this leave or any additional days of unpaid leave granted for religious observances at the discretion of the Superintendent or designee.

Spouse on Leave from Military Deployment

An employee who works an average of 20 hours or more per week and whose spouse is a member of the United States Armed Forces, National Guard, or reserves may take up to 10 days of unpaid leave during a period that his/her spouse is on leave from deployment during a military

conflict, as defined in Military and Veterans Code 395.10. (Military and Veterans Code 395.10)

Within two business days of receiving official notice that his/her spouse will be on leave from deployment, the employee shall provide the Superintendent or designee with notice of his/her intention to take the leave. The employee shall submit written documentation certifying that his/her spouse will be on leave from deployment during the time that the leave is requested. (Military and Veterans Code 395.10)

Leave for Emergency Duty

An employee may take time off to perform emergency duty as a volunteer firefighter, a reserve peace officer, or emergency rescue personnel. (Labor Code 230.3)

Civil Air Patrol Leave

An employee may take up to 10 days of unpaid leave per calendar year, beyond any leave otherwise available to him/her, to respond to an emergency operational mission of the California Civil Air Patrol, provided that the employee has been employed by the district for at least a 90-day period immediately preceding the leave. Such leaves shall not exceed three days for a single mission, unless an extension is granted by the governmental entity authorizing the mission and is approved by the Superintendent or designee. (Labor Code 1501, 1503)

The employee shall give the district as much advance notice as possible of the intended dates of the leave. The Superintendent or designee may require certification from the proper Civil Air Patrol authority to verify the eligibility of the employee for the leave and may deny the leave if the employee fails to provide the required certification. (Labor Code 1503)

Legal Reference:

EDUCATION CODE

- 44036-44037 Leaves of absence for judicial and official appearances
- 44963 Power to grant leaves of absence (certificated)
- 44981 Leave of absence for personal necessity (certificated)
- 44985 Leave of absence due to death in immediate family (certificated)
- 44987 Service as officer of employee organization (certificated)
- 44987.3 Leave of absence to serve on certain boards, commissions, etc.
- 45190 Leaves of absence and vacations (classified)
- 45194 Bereavement leave of absence (classified)
- 45198 Effect of provisions authorizing leaves of absence
- 45207 Personal necessity (classified)
- 45210 Service as officer of employee organization (classified)
- 45240-45320 Merit system, classified employees

EVIDENCE CODE

- 1035.2 Sex assault counselor; definition
- 1037.1 Domestic violence counselor; definition

FAMILY CODE

297-297.5 Registered domestic partner rights, protections, and benefits

GOVERNMENT CODE

3543.1 Release time for representatives of employee organizations

12945.1-12945.2 California Family Rights Act

LABOR CODE

230-230.2 Leave for victims of domestic violence, sexual assault, or specified felonies

230.3 Leave for emergency personnel

230.4 Leave for volunteer firefighters

230.8 Leave to visit child's school

233 Illness of child, parent, spouse, domestic partner or domestic partner's child

234 Absence control policy

246.5 Paid sick days, purposes for use

1500-1507 Civil Air Patrol leave

MILITARY AND VETERANS CODE

395.10 Leave when spouse on leave from military deployment

PENAL CODE

667.5 Violent felony, defined

1192.7 Serious felony, defined

CALIFORNIA CONSTITUTION

Article 1, Section 8 Religious discrimination

UNITED STATES CODE, TITLE 29

2601-2654 Family and Medical Leave Act

UNITED STATES CODE, TITLE 42

2000d-2000d-7 Title VII, Civil Rights Act of 1964

COURT DECISIONS

Rankin v. Commission on Professional Competence, (1988) 24 Cal.3d 167

PUBLIC EMPLOYMENT RELATIONS BOARD DECISIONS

Berkeley Council of Classified Employees v. Berkeley Unified School District, (2008) PERB Decision No. 1954

Management Resources:

WEB SITES

California Federation of Teachers: <http://www.cft.org>

California School Employees Association: <http://www.csea.com>

California Teachers Association: <http://www.cta.org>

Public Employment Relations Board: <http://www.perb.ca.gov>

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Regulation
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

Board Policy

Professional Leaves

BP 4161.3
Personnel

The Governing Board recognizes that a broad range of experiences can strengthen an employee's ability to meet the educational needs of the district's students.

The Board may grant a professional leave of absence for up to one year to certificated employees for the purpose of permitting study or travel which will benefit the schools and students of the district. No more than one such leave of absence may be granted to an employee in a seven-year period. (Education Code 44966, 44967)

(cf. 4131 - Staff Development)
(cf. 4161/4261/4361 - Leaves)

To be eligible for a professional leave of absence, an employee must have served in the district for at least seven consecutive years preceding the leave. For this purpose, any prior professional leave taken by an employee shall be deemed a break in the employee's service. No other type of leave authorized by the Board, and no service by the employee for one year or less under a national recognized fellowship or foundation approved by the State Board of Education for research, teaching, or lecturing, shall be deemed a break in the employee's service. (Education Code 44967)

Rather than granting a professional leave for a continuous one-year period, the Board may require that the leave be taken in separate trimesters, provided that the total leave is completed within three years. Any period of service by the employee between the separate periods of leave shall comprise a part of the service required for a subsequent leave of absence. (Education Code 44966)

As a condition of being granted professional leave, the employee shall agree in writing to render service in the district following his/her return for a period equal to twice the period of the leave. (Education Code 44969)

The Board and employee may agree in writing to have the employee perform services for the district during the professional leave. (Education Code 44968)

Unless the employee agrees in writing with the Board not to receive compensation during the leave, the employee shall receive such compensation during the leave as the Board and employee agree upon in writing, which shall not be less than the employee's salary and the salary of a substitute employee in the position which the employee held prior to the granting of the leave. In lieu of such a difference, the Board may pay one-half of the salary of the employee. (Education Code 44968, 44968.5)

Compensation during the leave shall be paid in the manner authorized by Education Code 44969 and 44970.

At the end of the professional leave, the employee shall be reinstated in the position he/she held when the leave was granted, unless otherwise agreed upon by the employee. (Education Code 44973)

Legal Reference:
EDUCATION CODE
44966-44976 Leaves of absence for study or travel

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Administrative Regulation

Military Leave

AR 4161.5 4261.5, 4361.5

Personnel

Military leave shall be granted in accordance with applicable state and federal law to employees performing military duties on a voluntary or involuntary basis in a uniformed service, including active duty, active duty for training, initial active duty for training, inactive duty training, full-time National Guard duty, examination to determine fitness for duty, and performance of funeral honors duty. (Education Code 44800; Military and Veterans Code 395, 395.01, 395.02, 395.05, 395.1, 395.2, 395.9; 38 USC 4301, 4303, 4316)

(cf. 4161/4261/4361 - Leaves)

An employee who needs to be absent from the district to fulfill his/her military service shall provide advance written or verbal notice to the Superintendent or designee, unless the giving of such notice is precluded by military necessity or is otherwise impossible or unreasonable. (38 USC 4312; 20 CFR 1002.85, 1002.86)

Salary/Compensation

An employee shall receive his/her salary or compensation for the first 30 days of any one absence for military leave or during one fiscal year, under any of the following conditions:

1. **Active Military Training or Exercises:** The employee is granted a temporary military leave of absence to engage in ordered military duty for purposes of active military training, encampment, naval cruises, special exercises, or like activity as a member of the reserve corps or force of the United States Armed Forces, National Guard, or Naval Militia, provided that: (Military and Veterans Code 389, 395, 395.01)

a. He/she has been employed by the district for at least one year immediately prior to the day the military leave begins.

b. The ordered duty does not exceed 180 days, including time involved in going to and returning from such duty.

2. **Active Military Duty:** The employee is on military leave, other than a temporary military leave, to engage in active military duty as a member of the reserve corps or force of the United States Armed Forces, the National Guard, or the Naval Militia, provided that he/she has been employed by the district for at least one year immediately prior to the day the military leave begins. (Military and Veterans Code 389, 395.02)

3. **War or Other Emergency:** The employee, however long employed by the district, is a member of the National Guard who is engaged in military or naval duty during a state of extreme emergency as declared by the Governor, or during such time as the National Guard may be on

active duty in situations described in Military and Veterans Code 146, including travel time to and from such duty. (Military and Veterans Code 395.05)

4. Inactive Duty Training: The employee is a member of the reserve corps or force of the United States Armed Forces, National Guard, or Naval Militia who is engaged in temporary inactive duty training, provided that he/she has been employed by the district for at least one year immediately prior to the day the military leave begins and the ordered duty does not exceed 180 days, including time involved in going to and returning from such duty.

In determining the length of district employment when necessary to determine eligibility for compensation for military leave, all recognized military service performed during and prior to district employment shall be included.

For classified employees, 30 days' compensation shall be one month's salary. For certificated employees, 30 days' compensation shall be one-tenth of the employee's annual salary. (Education Code 45059)

Certificated employees shall not be entitled to compensation during non-teaching, non-paying months of the year.

During the period of military leave, an employee may, upon his/her own request, use any vacation or similar paid leave accrued before the commencement of the military leave. The district shall not require the employee to use such leave. (38 USC 4316; 20 CFR 1002.153)

Benefits

An employee may elect to continue his/her health plan coverage during the military leave. The maximum period of coverage for the employee and his/her dependents shall be either 24 months from the beginning of the leave or until the day after the employee fails to apply for or return to employment, whichever is less. (38 USC 4317; 20 CFR 1002.164)

An employee on military leave may be required to pay the employee cost, if any, of any funded benefit to the extent that other employees on leave are so required. (38 USC 4316)

An employee absent for 30 days or fewer shall not be required to pay more than the employee share for such coverage. An employee absent for 31 days or more may be required to pay not more than 102 percent of the full premium under the plan. (38 USC 4317; 20 CFR 1002.166)

Vacation and Sick Leave Accrual

An employee on temporary military leave under the conditions described in item #1 Active Military Training or Exercises, in the section entitled "Salary/Compensation" above, shall continue to accrue the same vacation, sick leave, and holiday privileges to which he/she would otherwise be entitled if not absent. (Military and Veterans Code 395)

(cf. 4161.1/4361.1 - Personal Illness/Injury Leave)

(cf. 4261.1 - Personal Illness/Injury Leave)

An employee on military leave who is serving in active duty in time of war, national emergency, or United Nations military or police operation shall not accrue sick leave or vacation leave during the period of such leave. (Military and Veterans Code 395.1)

However, an employee who is a National Guard member on active duty as described in item #3 War or Other Emergency, in the section entitled "Salary/Compensation" above, shall not suffer any loss or diminution of vacation or holiday privileges because of his/her leave of absence. (Military and Veterans Code 395.05)

Pension Plan Service Credit

Pension plan service credit and vesting shall continue during an employee's military leave as though no break in service had occurred. Payment of employer and employee contributions shall be made in accordance with law for members of the State Teachers' Retirement System or Public Employees' Retirement System. (Education Code 22850-22856; Government Code 20990-21013)

Employment Status

Absence for military leave shall not affect the classification of any certificated employee. In the case of a certificated probationary employee, the period of such absence shall not count as part of the service required to obtain permanent status, but shall not be construed as a break in the continuity of service for any purpose. (Education Code 44800)

(cf. 4116 - Probationary/Permanent Status)

Reinstatement Rights

At the conclusion of the military duty, an employee shall be promptly reinstated in the position held at the beginning of the leave, at the salary to which he/she would otherwise have been entitled, except under the conditions noted below. (Education Code 44800; Military and Veterans Code 395, 395.2; 38 USC 4304, 4313; 20 CFR 1002.180-1002.181)

(cf. 4030 - Nondiscrimination in Employment)

Any employee who performs active military duty in time of war, national emergency, or United Nations military or police operation has a right to return to his/her position within six months of an honorable discharge or placement on inactive duty. Reinstatement rights shall not be extended to any such employee who fails to return within 12 months after the first date upon which he/she could terminate or could cause to be terminated his/her active service. (Education Code 44800; Military and Veterans Code 395.1)

When an employee has been on military leave for reasons other than war or national emergency, the time frame for reinstatement shall depend on the length of military service as follows: (38

USC 4312; 20 CFR 1002.115, 1002.118)

1. For a leave of 30 days or fewer, the employee shall report for duty no later than the beginning of the first full work day following the completion of military service, provided the employee has a period of eight hours to rest following transportation to his/her residence.
2. For a leave of 31-180 days, the employee shall submit a written or verbal application for reinstatement not later than 14 days after the completion of military service.
3. For a leave of more than 180 days, the employee shall submit a written or verbal application for reinstatement within 90 days after the completion of military service.

In cases where reporting within the periods specified in items #1 and #2 above is impossible or unreasonable through no fault of the employee, he/she shall report as soon as possible after the expiration of the period. (38 USC 4312; 20 CFR 1002.115, 1002.117)

An employee who is hospitalized for, or convalescing from, an illness or injury incurred in or aggravated during the performance of military service shall report for duty or submit an application for reinstatement at the end of the period that is necessary to recover from such illness or injury, but no more than two years after the completion of military service unless circumstances beyond the employee's control make reporting within the two-year period impossible or unreasonable. (38 USC 4312; 20 CFR 1002.116)

(cf. 4032 - Reasonable Accommodation)

Upon receiving an application for reinstatement, the Superintendent or designee shall reinstate the employee as soon as practicable under the circumstances of his/her case, but within a time period not to exceed two weeks, absent unusual circumstances. (20 CFR 1002.181)

If the employee's previous position has been abolished, he/she shall be reinstated in a position of like seniority, status, and pay, if such position exists, or to a comparable vacant position for which he/she is qualified. (Military and Veterans Code 395, 395.1; 38 USC 4313; 20 CFR 1002.192)

An employee failing to apply for reinstatement within the appropriate period does not automatically forfeit his/her rights, but shall be subject to the Board's rules governing unexcused absences. (38 USC 4312)

The Superintendent or designee may elect not to reinstate an employee following military leave if any of the following conditions exists:

1. The district's circumstances have so changed as to make such re-employment impossible or unreasonable, such as a reduction in force that would have included the employee. (38 USC 4312; 20 CFR 1002.139)
2. The accommodation, training, or effort described in 38 USC 4313(a)(3), (a)(4), or

(b)(2)(B) would impose an undue hardship on the district as defined in 20 CFR 1002.5 or 1002.198. (38 USC 4312; 20 CFR 1002.139)

3. The employee's position was for a brief, nonrecurrent period and there was no reasonable expectation that such employment will continue indefinitely or for a significant period. (38 USC 4312; 20 CFR 1002.139)

4. The employee's cumulative length of absence and length of all previous military leave while employed with the district exceeds five years, excluding those training and service obligations specified in 38 USC 4312(c). (38 USC 4312; 20 CFR 1002.99-1002.103)

5. The employee was separated from military service with a disqualifying discharge or under other than honorable conditions. (Military and Veterans Code 395.1; 20 USC 4304, 4312; 20 CFR 1002.134-1002.138)

Notices

The Superintendent or designee shall provide employees a notice of the rights, benefits, and obligations of employees granted military leave and of the district under the Uniformed Services Employment and Reemployment Rights Act (USERRA), 38 USC 4301-4334. (38 USC 4334)

This requirement may be met by posting the notice where the district customarily places notices for employees. (38 USC 4334)

(cf. 4112.9/4212.9/4312.9 - Employee Notifications)

Legal Reference:

EDUCATION CODE

22850-22856 Pension benefits, STRS members on military leave

44018 Compensation for employees on active military duty

44800 Effect of active military service on status of employees

45059 Employee ordered to military/naval duty - computation of salary

GOVERNMENT CODE

18540 Definition of armed forces

18540.3 Recognized military service

20990-21013 Pension benefits, PERS members on military leave

MILITARY AND VETERANS CODE

146 Events justifying calling of militia into active service

389 Definitions; temporary military leave

394 Nondiscrimination based on military service

395-395.9 Military leave

UNITED STATES CODE, TITLE 38

4301-4334 Uniformed Services Employment and Reemployment Rights Act of 1994

CODE OF FEDERAL REGULATIONS, TITLE 20

1002.1-1002.314 Uniformed Services Employment and Reemployment Rights Act of 1994

COURT DECISIONS

Wright v. City of Santa Clara (1989) 213 Cal. App.3d 1503

Bowers v. San Buenaventura (1977) 75 Cal. App.3d 65

ATTORNEY GENERAL OPINIONS

77 Ops.Cal.Atty.Gen. 209 (1994)

69 Ops.Cal.Atty.Gen. 185 (1986)

63 Ops.Cal.Atty.Gen. 924 (1978)

19 Ops.Cal.Atty.Gen. 132 (1952)

18 Ops.Cal.Atty.Gen. 178 (1951)

Management Resources:

U.S. DEPARTMENT OF LABOR PUBLICATIONS

A Non-Technical Resource Guide to the Uniformed Services Employment and Reemployment Rights Act (USERRA), rev. April 2005

NATIONAL SCHOOL BOARDS ASSOCIATION PUBLICATIONS

The Uniformed Services Employment and Reemployment Rights Act (USERRA), NSBA

Federal File: Guidance on Federal School Law, 2003

WEB SITES

National Committee for Employer Support of the Guard and Reserve: <http://www.esgr.org>

National School Boards Association: <http://www.nsba.org>

U.S. Department of Labor, USERRA: <http://www.dol.gov/vets/programs/userra>

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Regulation
adopted:

DEHESA SCHOOL DISTRICT
El Cajon, California

DEHESA SCHOOL DISTRICT

To: Members of the Board
From: Nancy Hauer
Subject: **Personnel
Recommendations**

Meeting Date: January 15, 2019

- Action
- First Reading
- Information
- Presentation
- Discussion
- Public Hearing
- Roll Call Vote Required

The Governing Board is requested to approve/ratify the following personnel recommendations:

Personnel:

Certificated:

1. To hire a certificated long term substitute effective 12/18/2018 - 6/13/2019

Classified:

1. To hire a 3 hour instructional aide effective 1/14/2019 – 6/13/2019