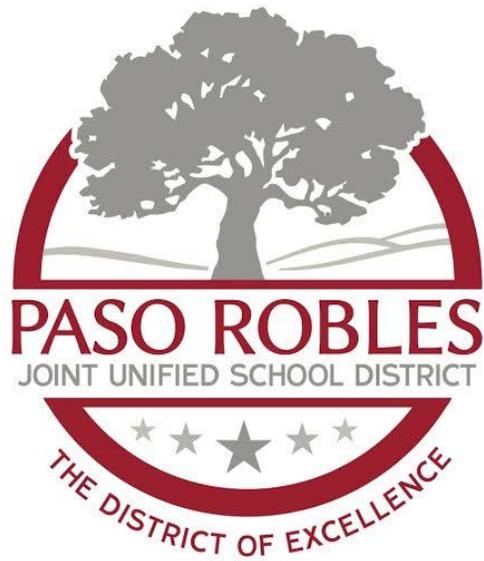


# 2021-22 Board of Trustees Handbook



<b>1</b>	PROTOCOLS / EDUCATION ACRONYMS
<b>2</b>	CALENDARS / ORG CHARTS
<b>3</b>	CONTACTS / DIRECTORIES
<b>4</b>	GOVERNANCE
<b>5</b>	ROBERT'S RULES / BROWN ACT
<b>6</b>	BOARD BYLAWS
<b>7</b>	FINANCIAL RESOURCES
<b>8</b>	DISTRICT FACILITIES MASTER PLAN UPDATE
<b>9</b>	CORRESPONDENCE
<b>10</b>	



## Board Protocols and Procedures

### ONGOING COMMUNICATION

- Superintendent/Staff will send Friday Report
- Will send critical items immediately as they arise

### BOARD MEMBER VISITS TO SCHOOLS

- Each Board member will adopt three or more schools/sites in the District, so that every school has at least two Board liaisons assigned. Board members are encouraged to attend PTA/PTO and site council meetings, as appropriate.
- Board members should reach out to Principals to arrange visits.
- Board members may also visit unassigned schools for events, special gatherings, etc., by contacting the school Principal.
- Please refrain from visiting unannounced.

### BOARD MEMBER QUESTIONS TO SUPERINTENDENT/STAFF

- All Board members will communicate directly with Superintendent
- Board members may contact Executive Cabinet directly (Jen Gaviola, Brad Pawlowski) but should also cc: Superintendent on all communication to staff.

### COMPLAINTS/ISSUES BROUGHT TO BOARD MEMBERS FROM COMMUNITY

- Point the complainant to talk to the Teacher, Principal, or the appropriate person to handle the matter.
- Where appropriate, tell the Superintendent about the complaint/issue as a "heads-up".
- Adhere to District Board Policies/Bylaws pertaining to Governance Standards and Board Authority, etc. as laid out in Board Policies 1312, 1312.1, and Board Bylaws 9005, 9121, 9200 and 9322.
- Once an email/complaint is answered, the Board can be cc'd to acknowledge that the complaint has been handled with no further response from Board members.

### WHEN/HOW BOARD MEMBERS RECEIVE AGENDA ITEMS AND HOW QUESTIONS FROM BOARD MEMBERS ABOUT AGENDA MATERIALS ARE HANDLED

- Email questions to Superintendent – don't wait until pre-board meeting discussions
- If you would like to make an appointment to speak to the Superintendent in person, please reach out to the Executive Assistant to the Superintendent.
- Superintendent will use his discretion when deciding whether to respond to all Board members or whether to respond only to the one who posed the question.
- There should be no replies, back and forth, or forwarding of those responses to others lest you risk a Brown Act violation.



## **BOARD ROLE IN COLLECTIVE BARGAINING**

- The Board members are not at the table and should not discuss collective bargaining with union members while in negotiations.

## **COLLECTIVE RESPONSIBILITY FOR ADHERENCE TO BOARD AGREEMENTS**

- Follow guidelines for Board interactions at Board meetings as laid out in Board Bylaw 9121 and 9322.
- Wait to be acknowledged by the President before speaking.

## **BOARD MEMBER COMMUNICATIONS WITH EACH OTHER**

- Keep one-on-one conversations confidential.
- Support one another to adhere to the Brown Act at all times.

## **BOARD MEMBERS MEETING WITH PRINCIPALS/STAFF – AFTER SCHOOL HOURS**

- If a staff member reaches out to a Board member to chat, it is appropriate to do so, at the Board Member's discretion.
- Board members meeting one-on-one with a member of the Union Leadership should inform the Superintendent.
- Meetings with others may be set up individually and reported to the Superintendent as needed.

## **RESPONSES TO MEDIA/PUBLIC IN GENERAL**

- The Superintendent or Deputy Superintendent will respond to the media.
- The Board President or designee will respond to emails sent to all Board members as a group and will copy the Superintendent.
- A Board member always retains the right to respond to anyone, but not on behalf of the Board.

## **BOARD MEETING AGENDA SETTING & COMMUNICATION ON AGENDA ITEMS**

- An annual Board Governance Calendar will be developed to inform the Board and the public of upcoming agenda items.
- The Board President, Board Clerk and one rotating Board member will meet with the Superintendent and Executive Cabinet two days prior to posting the agenda for agenda review.
- As per Board Bylaw 9322, members of the public may request in writing to the Superintendent that an item be placed on the agenda of a future regular meeting (note: more details on the process for community members to request an agenda item are found in Board Bylaw 9322).

## **VOTING**

- If a Board member is going to vote "no" or abstain, prior to taking a vote, they are encouraged to explain why they are going to vote "no" or abstain.

# Common Education Acronym Definitions

<u>ACRONYM</u>	<u>DESCRIPTION</u>
504	Section 504 of the Rehabilitation Act of 1973 is a civil rights statute which prohibits discrimination against individuals with disabilities. A 504 plan is an individual education plan for a special-needs student.

<b>A</b>	
a-g	A pattern of coursework for high school students that is validated by the UC/CSU systems as meeting expectations for entry to undergraduate university programs
AASA	American Association of School Administrators
AB	Assembly Bill
ABE	Adult Basic Education
ACE	American Council on Education
ACIA	Academic and Career Integral Assessments in Career Education
ACR	Assembly Concurrent Resolution
ACSA	Association of California School Administrators
ACT	American College Testing
ADA	Americans with Disabilities Act
ADA	Average Daily Attendance
ADAD	Assessment Development and Administration Division
ADD	Attention Deficit Disorder
ADHD	Attention Deficit Hyperactivity Disorder
AFDC	Aid to Families with Dependent Children
AFT	American Federation of Teachers
AH	Auditory Handicap Services
AID	Audits and Investigations Division
AIECE	American Indian Early Childhood Education
AIP	Academic Improvement Plan
AMAO	Annual Measurable Achievement Objective
AMARD	Analysis, Measurement, and Accountability Reporting Division
AP	Advanced Placement
APE	Adaptive Physical Education
API	Academic Performance Index
APR	Accountability Progress Reporting
AR	Accelerated Reader™ Created by Renaissance Learning
ARRA	American Recovery and Reinvestment Act of 2009
ASAM	Alternative Schools Accountability Model
ASB	Associated Student Body
ASD	After School Division
ASES	After School Education and Safety Program
ASRA	Administrative Support and Regulations Adoption
AVID	Advanced Via Individual Determination
AYP	Adequate Yearly Progress

<b>B</b>	
BCLAD	Bilingual Cross-cultural Language and Academic Development Certificate or Credential
BIP	Behavior Intervention Plan
BPPVE	Bureau for Private Postsecondary and Vocational Education
BTSA	Beginning Teacher Support and Assessment
BTTP	Bilingual Teacher Training Program

**ACRONYM    DESCRIPTION**

**C**

CAA	California Alternate Assessments
CAASFEP	California Association of Administrators of State and Federal Education Programs
CAASPP	California Assessment of Student Performance and Progress
CABE	California Association of Bilingual Education
CAC	Community Advisory Committee
CACE	California Association for Compensatory Education
CACFP	Child and Adult Care Food Program
CADS	Consolidated Application Data System
CAHSEE	California High School Exit Examination
CALPADS	California Longitudinal Pupil Achievement Data System
CalPERS	California Public Employees' Retirement System
Cal-SAFE	California School Age Families Education
CalSTRS	California State Teachers' Retirement System
CALTIDES	California Longitudinal Teacher Integrated Data Education System
CalWORKS	California Work Opportunity and Responsibility to Kids
CaMSP	California Mathematics and Science Partnership
CAPA	California Alternate Performance Assessment
CARS	Consolidated Application and Reporting System
CASBO	California Association of School Business Officials
CASEMIS	California Special Education Management Information System
CASH	Coalition for Adequate School Housing
CAST	California Science Test
CAT	Computer-adaptive Test
CAT/6	California Achievement Tests, Sixth Edition
CBA	Collective Bargaining Agreement
CBE	Competency-based Education
CBEDS	California Basic Educational Data System
CBEST	California Basic Educational Skills Test
CBET	Community-based English Tutoring
CBOC	Citizens' Bond Oversight Committee
CBR	California Business Roundtable
CBT	Computer-based Test
CCAIE	California Council for Adult Education
CCC	California Community Colleges
CCDA	California Career Development Association
CCDAA	California Child Development Administrators Association
CCDBG	Child Care and Development Block Grant
CCDF	Child Care and Development Fund
CCEI	California Counsel of Electronics Instructors
CCFRF	Child Care Facilities Revolving Fund
CCIS	California Consortium for Independent Study
CCLDHN	California Conference of Local Health Department Nutritionists
CCR	California Code of Regulations
CCR	Coordinated Compliance Review
CCS	California Children's Services
CCSESA	California County Superintendents Educational Services Association
CCSS	Common Core State Standards
CCSSO	Council of Chief State School Officers
CCTD	Career and College Transition Division
CD	Communications Division
CDC	Centers for Disease Control and Prevention
CDD	Child Development Division
CDE	California Department of Education
CDFS	Child Development Fiscal Services
CDHS	California Department of Health Services
CDPAC	Child Development Policy Advisory Committee
CDS	Community Day Schools

<b><u>ACRONYM</u></b>	<b><u>DESCRIPTION</u></b>
CDS	County/District/School Code
CDSMC	Curriculum Development and Supplemental Materials Commission
CDTC	California Drafting Technology Consortium
CEEB	College Entrance Examination Board
CELDT	California English Language Development Test
CFCC	Curriculum Framework and Evaluation Criteria Committee
CFR	Code of Federal Regulations
CFT	California Federation of Teachers
CH	Communicatively Handicapped
CHADD	Children and Adults with Attention-deficit/Hyperactivity Disorder
CHDP	Children's Health and Disability Prevention
CHKRC	California Healthy Kids Resource Center
CHKS	California Healthy Kids Survey
CHSA	California Head Start Association
CHSPE	California High School Proficiency Examination
ConAPP	Consolidated Application
CIF	California Interscholastic Federation
CITEA	California Industrial and Technology Education Association
CLAD	Crosscultural, Language, and Academic Development
CLHS	California League of High Schools
CLLS	California Library Literacy Services
CLMS	California League of Middle Schools
CLRN	California Learning Resource Network
CMA	California Modified Assessment
CMAS	California Multiple Award Schedule
CMD	Clearinghouse for Multilingual Documents
CMH	County Mental Health
CMR	Contract Monitoring Review
CNAC	Child Nutrition Advisory Council
CNIPS	Child Nutrition Information Payment System
COABE	Commission on Adult Basic Education
COC	Citizens' Oversight Committee
COCCC	Chancellor's Office of the California Community Colleges
COE	County Office of Education
COICC	California Occupational Information Coordinating Committee
COLA	Cost-of-Living Adjustment
CP	Cerebral Palsy
CPA	California Partnership Academies
CPCM	Categorical Programs Complaints Management
CPDI	California Professional Development Institutes
CPEC	California Postsecondary Education Commission
CPPP	College Preparation Partnership Program
CPS	Child Protection Services
CR	Constructed Response
CRESST	Center for Research on Evaluation, Standards, and Student Testing
CRISS	Creating Independence through Student-owned Strategies
CRL	California Reading List
CRLP	California Reading and Literacy Project
CRP	Content Review Panel
CSA	California Spanish Assessment
CSAM	California School Accounting Manual
CSB	California School for the Blind
CSBA	California School Boards Association
CSD	California School for the Deaf
CSD	Charter Schools Division
CSEA	California School Employees Association
CSEA	California State Employees Association
CSECC	California State Employees Charitable Campaign

**ACRONYM    DESCRIPTION**

CSEY	Classified School Employee of the Year
CSF	California Scholarship Federation
CSFP	Commodity Supplemental Food Program
CSFSA	California Schools Food Service Association
CSIS	California School Information Services
CSLA	California School Library Association
CSMP	California Subject Matter Projects
CSMT	Clearinghouse for Specialized Media and Translations
CSNO	California School Nurses Organization
CSPD	Comprehensive System of Personnel Development
CSR	Class-size Reduction
CSR	Comprehensive School Reform
CSRP	California School Recognition Program
CSS	Comprehensive Student Support
CSSA	California Safe Schools Assessment
CSSAED	Coordinated Student Support and Adult Education Division
CST	California Standards Tests
CST	Child Study Team
CSU	California State University
CTA	California Teachers Association
CTAP	California Technology Assistance Project
CTB	Competency Testing Battery
CTC	California Transportation Commission
CTC	Commission on Teacher Credentialing
CTE	Career Technical Education
CTEI	Comprehensive Teacher Education Institute
CWA	Child Welfare and Attendance
CYA	California Youth Authority

---

**D**

D/HH	Deaf/Hard of Hearing
DAC	District Advisory Committee
DAIT	District Assistance and Intervention Team
DARE	Drug and Resistance Education
DD	Developmentally Delayed
DEAM	Department of Education Administrative Manual
DGS	Department of General Services
DHH	Deaf and Hard of Hearing
DIS	Designated Instruction and Services
DOE	Department of Education
DOF	Department of Finance
DOL	U.S. Department of Labor
DPA	Department of Personnel Administration
DSA	Division of the State Architect
DSIB	District, School, and Innovation Support Branch
DSS	Department of Social Services

---

**E**

EAP	Early Assessment Program
EC	Education Code
ED	Emotionally Disturbed
EDGAR	Education Department General Administrative Regulations
EDMD	Educational Data Management Division
EETT	Enhancing Education Through Technology
EH	Emotionally Handicapped
EIA	Economic Impact Aid
EL/ELL	English Learner or English Language Learner
ELA	English Language Arts
ELAC	English Language Advisory Committee

**ACRONYM**    **DESCRIPTION**

ELAP	English Language Acquisition Program
ELD	English Language Development
ELPAC	English Language Proficiency Assessments for California
ELSD	English Learner Support Division
EMH	Educable Mentally Handicapped
EO	English Only
ERIC	Education Resources Information Center
ESE	Exceptional Student Education
ESEA	Elementary and Secondary Education Act of 1965
ESL	English as a Second Language
ESOL	English Speakers of Other Languages
ESY	Extended School Year
ETR	Evaluation Team Report
ETS	Educational Testing Service

---

**F**

FAA	Functional Analysis Assessment
FAFSA	Free Application for Federal Student Aid
FAPE	Free and Appropriate Public Education
FASD	Fiscal and Administrative Services Division
FBA	Functional Behavioral Assessment
FCMAT	Fiscal Crisis and Management Assistance Team
FEP	Fluent English Proficient
FEP-R	Fluent English Proficient-Reclassified
FERPA	Family Educational Rights and Privacy Act
FFA	Future Farmers of America
FPD	Fiscal Policy Division
FPM	Federal Program Monitoring
F/RPM	Free/Reduced-price Meals
FTE	Full-time Equivalent
FY	Fiscal Year
FYS	Foster Youth Services

---

**G**

GAD	Government Affairs Division
GATE	Gifted and Talented Education
GED	General Educational Development Test
GO	General Obligation (Bond)
GPA	Grade Point Average
GRE	Graduate Records Examination
GSE	Golden State Examination
GSSMD	Golden State Seal Merit Diploma

---

**H**

HCE	Health Careers Education
HECT	Home Economics Careers and Technology
HI	Hearing Impaired
HOUSSE	High Objective Uniform State Standard of Evaluation
HPSGP	High Priority Schools Grant Program
HQT	Highly Qualified Teacher
HSET	High School Equivalency Tests
HTML	Hypertext Markup Language

---

**I**

IAD	Improvement and Accountability Division
IASA	Improving America's Schools Act of 1994
IDEA	Individuals with Disabilities Education Act
IEP	Individualized Education Program
IEPT	IEP Team

**ACRONYM    DESCRIPTION**

IFSP	Individualized Family Service Plan
IHSS	In-home Support Services
II/USP	Immediate Intervention/Underperforming Schools Program
ILSB	Instruction and Learning Support Branch
IS	Independent Study
IT	Information Technology

---

**J**

JPA	Joint Powers Agreement/Authority
JROTC	Junior Reserve Officers Training Corps

---

**L**

LAC	Legal, Audits, and Compliance Branch
LAN/WAN	Local Area Network/Wide Area Network
LC	Language Census
LCAP	Local Control Accountability Plan
LCFF	Local Control Funding Formula
LD	Learning Disabled
LD	Legal Division
LEA	Local Educational Agency
LEP	Limited English Proficient
LH	Learning Handicapped
LLD	Language Learning Disabilities
LPCs	Local Child Care and Development Planning Councils
LRDC	Learning Resources Display Centers
LRE	Least-Restrictive Environment
LSH	Language, Speech, and Hearing

---

**M**

MC	Multiple Choice
MD	Multiple Disabilities
MH	Mildly Handicapped
MM	Mild to Moderate Handicap
MOU	Memorandum of Understanding
MS	Multiple Sclerosis
MTYRE	Multi-track Year-round Education
MYP	Multi-year Projection

---

**N**

NABE	National Association for Bilingual Education
NAEA	National Art Education Association
NAEP	National Assessment of Educational Progress
NAESP	National Association of Elementary School Principals
NAME	National Association for Multicultural Education
NASBE	National Association of State Boards of Education
NASSP	National Association of Secondary School Principals
NASTA	National Association of State Textbook Administrators
NASW	National Association of School Social Workers
NBCT	National Board Certified Teacher
NBPTS	National Board for Professional Teaching Standards
NCBE	National Clearinghouse for Bilingual Education
NCDA	National Career Development Association
NCEE	National Center on Education and the Economy
NCES	National Center for Education Statistics
NCHSTE	National Consortium on Health Science and Technology Education
NCLB	No Child Left Behind Act of 2001
NCSL	National Conference of State Legislatures
NCSS	National Council for Social Studies
NCTE	National Council of Teachers of English

**ACRONYM    DESCRIPTION**

NCTM	National Council of Teachers of Mathematics
NEA	National Education Association
NEP	Non-English Proficient
NES	Non-English Speaking
NET	Nutrition Education and Training
NGSS	Next Generation Science Standards
NPR	National Percentile Rank
NPS	Non-public School
NSBA	National School Boards Association
NSD	Nutrition Services Division
NSF	National Science Foundation
NSTA	National Science Teachers Association

---

**O**

OCD	Obsessive Compulsive Disorder
OCR	Office of Civil Rights
OCR	On Campus Retention
OEO	Office of Equal Opportunity
OHI	Other Health Impairment
OI	Orthopedically Impaired
OPSC	Office of Public School Construction
OSE	Office of the Secretary of Education
OSEP	Office of Special Education Programs
OSHA	Occupational Safety and Health Administration
OT	Occupational Therapy

---

**P**

PA	Performance Assessment
PAC	Parent Advisory Committee
PAR	Peer Assistance and Review Program for Teachers
PASR	Principal Apportionment System Rewrite
PBDMI	Performance Based Data Management Initiative
PCA	Program Cost Account
PD	P-16 Division
PE	Physical Education
PERB	Public Employment Relations Board
PERS	Public Employees Retirement System
PFT	Physical Fitness Testing
PI	Physically Impaired
PI	Program Improvement
PL	Public Law
PLSD	Professional Learning Support Division
PMH	Profoundly Mentally Handicapped
PMP	Pregnant Minors Program
PPIB	P-16 Policy and Information Branch
PPR	Pupil Promotion and Retention
PQR	Program Quality Review
PREA	Paso Robles Education Alliance
PRPE	Paso Robles Public Educators
PSAA	Public Schools Accountability Act
PSAT	Preliminary Scholastic Achievement Test
PSD	Personnel Services Division
PT	Physical Therapy
PTA	Parent Teacher Association
PTO	Parent Teacher Organization
PTSA	Parent Teacher Student Association
PTSO	Parent Teacher Student Organization

---

**ACRONYM**    **DESCRIPTION**

**Q**

QAP            Quality Assurance Process  
QEIA          Quality Education Investment Act of 2006

---

**R**

RDA            Recommended Daily Allowance  
RFA            Request for Applications  
RFEP          Reclassified to Fluent English Proficient  
RFP            Request for Proposals  
RLA            Reading/Language Arts  
ROC/P        Regional Occupational Center/Program  
ROTC         Reserve Officers Training Corps  
RSP            Resource Specialist Program  
RTI            Response to Intervention

---

**S**

S4              Statewide System of School Support  
S & L          Speech and Language  
SAB            State Allocation Board  
SAC            School Advisory Council  
SACS          Standardized Account Code Structure  
SAFTIB        Services for Administration, Finance, Technology, and Infrastructure Branch  
SAP            Student Assistance Program  
SAPID         School Age Parenting and Infant Development  
SARB          School Attendance Review Board  
SARC          School Accountability Report Card  
SASI          School Administrative Student Information  
SAT            Scholastic Achievement Test  
SAT-9         Stanford Achievement Test, Ninth Edition  
SB             Senate Bill  
SBCP          School-based Coordinated Program  
SBE            State Board of Education  
SBP            School Breakfast Program  
SCANS         Secretary's Commission on Achieving Necessary Skills  
SCASS         Southern California Association of Science Supervisors  
SCASS         State Collaborative on Assessment & Student Standards-Health Education Assessment Project  
SCE            State Compensatory Education  
SCFIRD        Standards, Curriculum Frameworks, and Instructional Resources Division  
SCO            State Controller's Office  
SCORE         Schools of California Online Resources for Education  
SCR            Senate Concurrent Resolution  
SCS            Superintendent's Correspondence System  
SDAIE         Specially Designed Academic Instruction in English  
SDC            Special Day Class  
SDFSC         Safe and Drug Free Schools and Communities  
SEA            State Educational Agency  
SED            Severely Emotionally Disturbed  
SED            Socioeconomically Disadvantaged  
SED            Special Education Division  
SEECAP        Special Education Early Childhood Administrators Project  
SEEDS         Supporting Early Education Delivery Systems  
SEIDs         Statewide Educator Identifiers  
SELPA         Special Education Local Plan Area  
SES            Supplemental Educational Services  
SETS          Statewide Education Technology Services  
SFSD          School Fiscal Services Division  
SFSP          Summer Food Service Program  
SFTSD         School Facilities and Transportation Services Division

<b><u>ACRONYM</u></b>	<b><u>DESCRIPTION</u></b>
SH	Severely Handicapped
SHAPE	Shaping Health As Partners in Education
SHC	School Health Connections
SIG	School Improvement Grant
SIO	Superintendent's Initiatives Office
SIP	School Improvement Plan
SIS	Student Information System
SLD	Specific Learning Disability
SLI	Speech and Language Impaired
SLOCOE	San Luis Obispo County Office of Education
SLOCSBA	San Luis Obispo County School Boards Association
SNA	School Nutrition Association
SNE	Society for Nutrition Education
SNOR	Student National Origin Report
SNP	School Nutrition Program
SPAC	State Parent Advisory Council
SPB	State Personnel Board
SPED	Special Education
SPSA	Single Plan for Student Achievement
SRO	School Resource Officer
SSC	School Site Council
SSID	Statewide Student Identifier
SSPI	State Superintendent of Public Instruction
SSSSB	Student Support and Special Services Branch
SST	Student Study Team
STAR	Standardized Testing and Reporting Program
STEM	Science, Technology, Engineering, and Mathematics
STS	Standards-based Tests in Spanish
SWP	Schoolwide Programs

## **T**

T5	Title 5, California Code of Regulations
TE	Technology Enhanced
TEROC	Tobacco Education and Research Oversight Committee
TICAL	Technology Information Center for Administrative Leadership
TK	Transitional Kindergarten
TMH	Trainable Mentally Handicapped
TSD	Technology Services Division
TUPE	Tobacco-use Prevention Education
TWBI	Two-way Bilingual Immersion

## **U**

UC	University of California
UCOP	University of California Office of the President
UCP	Uniform Complaint Procedure

## **V**

VAPA	Visual and Performing Arts
VE	Visiting Educator
VI	Visually Impaired

## **W**

WASC	Western Association of Schools and Colleges
WEE	Work Experience Education
WIC	Women, Infants, and Children
WISC-IV	Wechsler Intelligence Scale for Children - Fourth Edition.
WJIII	Woodcock-Johnson tests of Achievement, Third Edition
WTC	Work Training Center

**ACRONYM    DESCRIPTION**

**Y**

YOA	Year of Appropriation
YOB	Year of Budget
YOC	Year of Completion
YRBS	Youth Risk Behavior Survey
YRBSS	Youth Risk Behavior Surveillance System
YRE	Year-round Education



# PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT

## 2021-2022 Academic Calendar

Board approved: 2/11/2020

July						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
						0

August						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				
						9

September						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		
						21

October						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						20

November						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				
						15

December						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	
						13

January						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					19

February						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					
						18

March						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		
						22

April						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
						15

May						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				
						21

June						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		
						7

IMPORTANT DATES
7/5- Independence Day Observed
8/9-8/13-New Teachers PD
8/16 Staff PD
8/17 Staff PD
8/18- Teacher Work Day
<b>8/19 - FIRST DAY OF SCHOOL</b>
9/6 - Labor Day Holiday
10/11 -No School - Staff PD
11/11- Veteran's Day Holiday
11/12 - No School (*PSPS or PD)
11/22 - 11/26 Thanksgiving Break
11/25 - Thanksgiving Holiday
11/26 - Day after Thanksgiving Holiday
12/17 - Minimum Day
12/20 - 12/31 Winter Break
12/23-Christmas Eve Holiday
12/24 - Christmas Holiday
12/30 - New Year's Eve Holiday
12/31 - New Year's Day Holiday
<b>1/3 - No School (*PSPS or PD)</b>
1/17 - Martin Luther King Holiday
2/11 - Lincoln's Birthday Holiday
2/21 - President's Day Holiday
<b>3/4 - No School (*PSPS or PD)</b>
4/15 - 4/22- Spring Break
5/30 - Memorial Day Holiday
<b>6/9- LAST DAY OF SCHOOL</b>
6/9- Minimum Day
6/10 - PRHS Graduation
6/10 - Teacher Workday

\*  
PSPS = Public Safety Power Shutoff  
PD = Professional Development

### IMPORTANT DATES:

#### Elementary Trimesters:

1st 8/19/21 - 11/15/21  
2nd 11/16/21- 3/18/22  
3rd 3/21/22 - 6/9/22

#### Middle/ High School Quarters:

1st ends 10/15/21  
2nd ends 12/17/21  
3rd ends 3/18/22  
4th ends 6/9/22

#### Elementary School Conferences

October 18 - October 22 (minimum days)  
March 7 - March 11 (minimum days)

#### Middle School Conferences

October 21, 2021  
March 10, 2022

#### Middle/High School Progress Report Dates:

9/17/21, 11/5/21, 2/4/22, 4/29/22



**Paso Robles  
Joint Unified School District**

800 Niblick Road  
Paso Robles, CA 93446

Tel: 805.769-1000 FAX: 805.237-3339

[www.pasoschools.org](http://www.pasoschools.org)

**Superintendent Dr. Curt Dubost**

**Confidential Executive Secretary**  
Theresa Braden

**Deputy Superintendent**  
Jen Gaviola

**Assistant Superintendent**  
Brad Pawlowski

**Curriculum and Instruction Director**  
Erin Haley

**LCAP/Grants/Curriculum Projects**  
Babette DeCou

**TK-12 Principals**

<b>Anthony Overton</b> Paso Robles High School
<b>Dan Sharon</b> Liberty/Independence/ P.R.I.S.C.
<b>Michael Vogenthaler</b> Lewis Middle School
<b>Audra Carr</b> Flamson Middle School
<b>Damien Capalare</b> Pat Butler Elem.
<b>Holly Moore</b> Winifred Pifer Elem.
<b>Celia Moses</b> Georgia Brown Elem.
<b>Maggie Tatman</b> Virginia Peterson Elem.
<b>Stephanie Walker</b> Glen Speck Elem.
<b>Kelly Ward</b> Kermit King Elem.

**Deputy Superintendent, Jen Gaviola**  
Human Resources  
Title IX Coordinator  
Public Information

**Human Resources Director**  
Jen Gaviola  
Recruitment/Retention  
Complaints/Investigations  
OCR  
Health Benefits

**HR Specialist II: Classified**  
Marcy Garcia  
**HR Specialist I: Confidential/ Public Information**  
BreAnne Cerda  
**Certificated**  
TBD  
**Management**  
Debi Weber

**New Teacher Support**  
Kelly Roth  
Trina Nicklas

**Special Education Director**  
Terry Hollen  
**PPA** Elena Davis  
**District Clerk**  
Megan Edwards  
**MIS Liaison**  
Yesi Leon  
Individual Ed. Plan  
504s

**2 Program Specialist**  
Catherine Johnson  
Jessica Shaffer

**Health Coordinator**  
Ashley Aiello

**Psychologists**

**Mental Health Therapists**

**Speech Language Pathologists**

**Student Services Director**  
Tom Harrington  
**PPS** Pam Foster  
Student Discipline  
Homeless/Foster Youth  
Attendance  
Home Hospital

**Campus Assistants/ Behavior Paraeducators**

**Safety/Attendance**  
Dana Holt

**Aeries Manager**  
Alex Torres

**Athletics**

**Counseling, College & Career**  
Jenn Clayton

**TK-12 Counselors**

**Assistant Superintendent**  
Brad Pawlowski  
Fiscal Management  
Capital Improvements  
Business Contracts

**Confidential Executive Secretary**  
Yvette Reynoso

**Fiscal Services Director**  
Audrey Brouillard  
Purchasing  
Position Control  
Payroll

**Purchasing Manager**  
Christina Bennett

**Position Control/ACA**  
Renee Vinson

**Account Technicians**  
Kim Blanton  
Isabel Diaz  
TBD

**Payroll**  
Donna Elstrom  
Michelle Radecki

**Maintenance & Operations & Transportation Director**  
Kelly Stainbrook  
PPA Gina Lynch

**Risk Management**

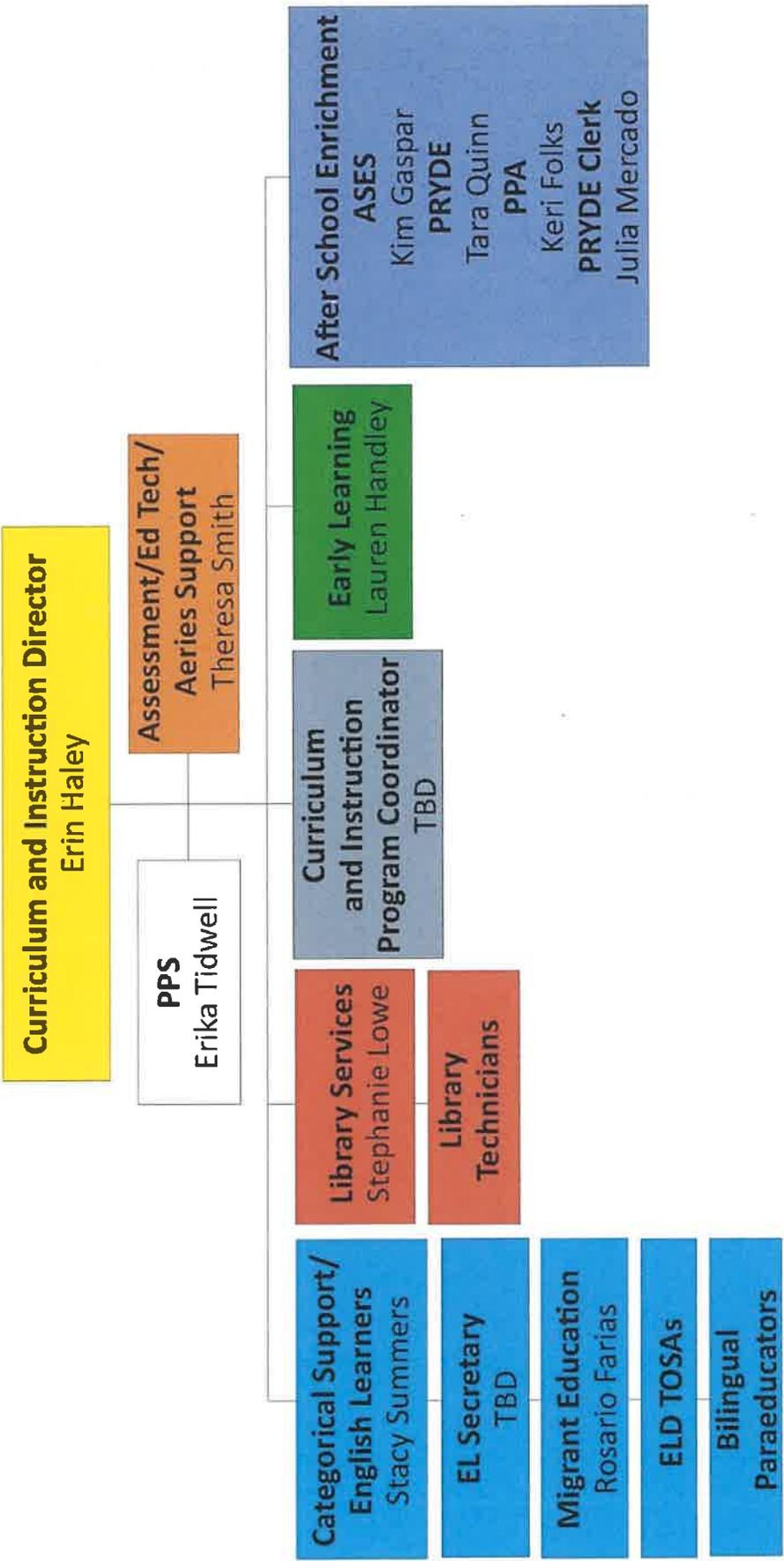
**Transportation & Operations Dispatcher**  
JP Camsuzou  
Lisa Costanza

**Workman's Comp**

**Facilities and Planning Director**  
Ric Reyes

**Food Services Director**  
Jessie Wesch  
PPA Nora Vasquez

**Technology Director**  
Scott Buller  
PPA Julie Wright





**Arts Academy at Bauer Speck Elementary (002)**

2405 Spring St  
805-769-1350 fax: 237-3498  
Shanna Ray, Principal  
Marlee Barger, Secretary ext. 22002

**Georgia Brown Elementary (003)**

525 36th Street  
805-769-1200 fax: 237-3426  
Celia Moses, Principal  
Claudia Jauregui, Secretary ext.23002  
Gustavo Ramirez, Custodian ext. 23058

**Pat Butler Elementary (007)**

700 Nicklaus Street  
805-769-1750 fax: 237-3496  
Damien Capalare, Principal  
Maribel Rodriguez, Secretary ext. 27002  
OPEN, Custodian ext. 27045

**Kermit King (001)**

700 Schoolhouse Circle  
805-769-1700 fax: 237-6169  
Kelly Ward, Principal  
Susan Soto, Secretary ext. 21002  
Jose Cisneros, Custodian ext. 21504

**Virginia Peterson Elementary (006)**

2501 Beechwood Drive  
805-769-1250 fax: 237-3497  
Maggie Tatman, Principal  
Dawn Hawley, Secretary ext.26002

**Winifred Pifer Elementary (004)**

1350 Creston Road  
805-769-1300 Fax: 237-3398  
Megen Guffey, Principal  
Rosanna Morales, Secretary ext. 24002

**Marie Bauer Elementary School (008)**

626 Vine Street  
805-769-1800  
, Principal  
, Secretary ext.28002

**George Flamson Middle School (010)**

2405 Spring Street  
805-769-1400 fax: 237-3427  
Audra Carr, Principal  
Sandy Brooks, Secretary ext.10002

**Daniel Lewis Middle School (011)**

900 Creston Road  
805-769-1450 fax: 237-3458  
Michael Vogenthaler, Principal  
Secretary ext.11002

**Liberty High School (049)**

810 Niblick Road  
805-769-1600 fax: 237-3466  
Dan Sharon, Principal  
Wendy Butterfield, Secretary ext.51510  
Penelope Bigelow, Liberty Clerk ext.51002

**Paso Robles High School (050)**

801 Niblick Road  
805-769-1500 fax: 237-3424  
Anthony Overton, Principal  
Cherie Long, Secretary ext.50002

**Independence High School (051)**

812 Niblick Road  
805-769-1620 fax: 237-3374  
Dan Sharon, Principal  
Wendy Butterfield, Secretary ext. 51510

**Homeschool (PRISC) (051)**

812 Niblick Road (at Independence HS)  
805-769-1675 Fax 237-3374  
Dan Sharon, Principal

**Food Service/Culinary Academy (025)**

1900 Golden Hill Road  
805-769-1133 fax: 237-3449  
Jessie Wesch, Director 25003  
Nora Gaisi, District Clerk ext. 25004

**Migrant Ed. (002)**

1802 Chestnut St.  
805-769-1380 805-769-1381  
Fax: 805-237-3345  
ASES 805-769-1360

**Teacher Center/District Annex (033)**

2900 Union Rd  
805-769-1100 fax: 237-3428

**Support Services Facility (032)**

2909 Ardmore Warehouse 805-769-1150  
2910 Union Rd. Transportation 805-769-1160

**Other Sites**

Little PEPers: 805-769-1374  
Independent Skills: 805-769-1100  
First 5: 805-769-1200 ext.23261  
PRYDE: 805-769-1050

NAME	Job Title	Ext
Aiello, Ashley	Coordinator of Health Services	30417
Bennett, Christina	Purchasing Manager	30250
Blanton, Kim	Accounting Lead/Budget	30109
Braden, Theresa	Superintendent's Secretary	30104
Brouillard, Audrey	Fiscal Services Director	30108
Cerda, BreAnne	Human Resources Specialist	30421
Davis, Elena	PPA (T. Hollen)	30416
Diaz, Isabel	Accounts Payable	30112
Dubost, Curt	Superintendent	30101
Ellstrom, Donna	Certificated Payroll	30110
Folks, Keri	PRYDE Secretary	30405
Foster, Pam	PPS, Student Services	30225
Garcia, Marcy	Human Resources Specialist	30113
Gaviola, Jennifer	Deputy Superintendent	30140
Haley, Erin	Director of Curriculum & Instruction	30401
Harrington, Tom	Director of Student Services	30424
Hollen, Terry	Director of Special Education	30129
Johnson, Katie	Special Education Program Coordinator	30107
Leon, Yesi	MIS Liaison	30422
Mercado, Julia	PRYDE Clerk/Receptionist	30414
Mullis, Melinda	Clerk Front Desk/Reception	30124
Pawlowski, Brad	CBO	30106
Quinn, Tara	PRYDE Supervisor	30404
Radecki, Michelle	Classified Payroll	30111
Reynoso, Yvette	Human Resources Specialist (Certificat	30119
Shaffer, Jessica	Special Education Program Coordinator	30415
Smith, Theresa	District Assessment Specialist	30408
Summers, Stacy	District ELD Coordinator	30420
Torres, Norma	Sec Front Desk/Centralized Enrollment	30102
Tidwell, Erika	PPS, Curriculum & Instruction	30302
Torres, Alexandro	SIS Manager (Aeries)	30015
Vinson, Renee	Position Control / Benefits Specialist	30117
Weber, Debi	Human Resources Specialist	30118
	Accounts Receivable	30147
	Admin Assist to CBO-B.Pawlowski	30105

NAME	Job Title	Ext
Baratta, Consuelo	Translator	33203
Becerra, Sandra	Girls Circle	33229
Buller, Scott	IT Director	33013
CDR Conference Calls		33132
Christman, Ian	IT Technicians	1111
Conference Room		33217
Front Desk		33001
Gaspar, Kim	ASES Coordinator	33223
IT Technicians		1111
Kalvans, Arnold	IT Technicians	1111
Nicklas, Trina		33140
Ojeda, Michael	IT Technicians	33028
Rabellino, Joyce	Translator	33303
Roth, Kelly	Teacher Induction Program Mentor	33044
Ruiz, Michelle	ASES Clerk	33221
SDR Conference Room		33305
Walter, Mark	IT Technicians	33033
Wendorff, Kris	Occupational Therapist	33105
Workroom		33102
Wright, Julie	Project Program Asst. IT	33209
		33215

**SSF** 805-769-1150 Fax 237-3425  
**Transportation** 805-769-1160

NAME	Job Title	Ext
Camsuzou, JP	Manager of Transportation/Operations	
Costanzo, Lisa	Transportation Dispatch	32003
Jenal-Stainbrook, Kelly	Director MOT	32009
Lynch, Gina	Project Program Assist.	32002
Mechanics		32006
Ravenscroft, Ria	Driver Instructor	32018
Reception		32007
Reyes, Ric	Manager of Planning and Facility	32011
Rodriquez, Martin	Maintenance/HVAC	32017
Roman-Mercado-Ubaldo	Locksmith	32020
Simoneau, Don	Maintenance/Plumbing	32019
Upstairs Lounge		32024
Vargas, David	Warehouse Lead	32012
Verzin, Joe	Maintenance/HVAC	32015
Warehouse		32014
Wilson, James	Maintenance/Painter	32016
	Maintenance	32005

<b>Culinary</b> 805-769-1133 Fax 237-3449		
Jessie Wesch	Food Service Director	25003
Café		25008
Conference		25005
Gaisi, Nora	District Clerk	25004
		25001
Kitchen		25010
Kitchen		25009
White, Adam	Coordinator of Culinary Education	25006
Staff Lounge		25007
		25002

**Glenn Speck Elementary School**

Phone 805-769-1350

Fax 805-237-3498

NAME	Job Title	Ext	VMB	NAME	Job Title	Ext	VMB
Walker, Stephenie	Principal	22001		McDonald, Kelsey	Teacher	22121	38073
Barger, Marlee	Secretary	22002		Klimek, Shanleigh	Teacher	22110	38485
Caraveo, Michelle	Clerk	22040		Koski, Rita	Teacher	22106	38368
Lauren Handley		22053		Riner, Kym	Preschool	22124	
Rayones, Angie	Bauer Clerk	22140		McKiernan, Michelle	Teacher	22103	38386
Pafumi, Monica	Guidance Specialist	22016					
	Psychologist	22051		McNellis, Moria	Teacher	22117	38462
Daysi Guerra	Family Advocate	22017		Mihelic, Ann	Teacher	22113	38072
Roady, Grace	Librarian	22129		Corbin, Melinda	Teacher	22118	38471
Jackson, Jerome	Custodian			Pearl, Terri	Teacher	22106	38168
Biaggini, Lori	Teacher	22120	38452	Lochhead, Ally	Teacher	22115	38524
Bergin, Kimberly	Speech	22116	38108	Wahlberg, Heather	Preschool	22123	38123
Buchanan, Teresa	Teacher	22104	38086	Whitley, Amy	Teacher	22107	38514
Carminati, Nanette	Homeschool	22128	38195				
Cox, Katie	Teacher	22108	38453				
Stoll, Amy	Teacher	22105	38088				
Diaz, Peggy	Teacher	22111	38091				
Ezzell, Brian	Teacher	22112	38078				
Weber, Donna	Teacher	22109	38513				
LaNovara, Elizabeth	Teacher	22101	38463				

**Kermit King Elementary**

**Phone 805-769-1700**

**Fax 805-237-6169**

<b>NAME</b>	<b>Job Title</b>	<b>Ext</b>	<b>VMB</b>	<b>NAME</b>	<b>Job Title</b>	<b>Ext</b>	<b>VMB</b>
Ward, Kelly	Principal	21001		Keil, Michelle	Teacher	21304	
Soto, Susan	Secretary	21002		Luster, Kate	Teacher	21401	
Manriquez, Laura	Clerk	21040		Marziello, Emma	Teacher	21602	
Student Phone	Office	21010		McGee, Shannon	Behavior Para	21513	
Conference Room		21009		McGuffin, Cindi	Teacher	21404	
Cafeteria	Clerk	21008		Mesmer, Anna	SpEd Teacher	21601	
Work Room		21041		Moreno, Carly	Intervention/ELD	21116	
Teacher Lounge		21042		O'Leary, Julie	Teacher	21402	
Thompson, Cynthia	Nurse	21043		Poppen, Erica	Teacher	21209	
DeHoyos, Desirae	Librarian	21015		Powell, Jill	Teacher	21206	
Manos, Marissa	Psychologist	21020		Ramia, Whitney	Teacher	21803	
Wendorff, Kris	O.T.	21521		Toone, Lindsay	Teacher	21403	
				Whedbee, Susan	Teacher	21801	
Arce, Catherine	Teacher	21303		Kalemba, Jacob	Speech	Remote	
Craig, Kaley	Teacher	21611		Barkley, Alyssa	Mental Health Therapist	21521	
Ballinger, Lindsey	Literacy Coach	21503		PRYDE 805-769-1707	K2	21702	
Hester, Tara	Teacher	21804		VAPA	K3	21703	
Holman, Christy	Teacher	21800		VAPA	K4	21704	
Iunker, Barbara	Math Intervention	21302		Cisneros, Jose	Custodian	21504	
Jaeger, Jillian	Teacher	21301		Perez, Mariano	Custodian	21504	

Winifred Pifer

Phone 805-769-1300

Fax 805-237-3398

NAME	Job Title	New Ext	VMB
Moore, Holly	Principal	24001	
Manos, Marissa	Guidance Specialist	24020	
Morales, Rosanna	Secretary	24002	
King, Betsy	Clerk	24040	
Balderrama, Suzanne	Intervention Specialist	24304	
Clansy, Adrienne	Psychologist	24043	
	Psychologist Intern	24043	
Vermey, Doris	Nurse	24042	
Jaureguy, Christy	Librarian	24210	
Patch, Rose	ELD/Intervention	24402	
Chappell, Katie	SpeechLP Assistant	24516	

Almquist, Melissa	Teacher	24316	38297
Bartlett, Beth	Teacher	24803	38240
Berry, Jill	Teacher	24404	38238
Bruce, Stacy	Teacher	24701	38075
Caruana, Carmen	Teacher	24904	38269
Lutz, Christy	Teacher	24206	38448
Farrell, Suzy	Teacher	24102	
Guerrero, Kelsey	Teacher	24903	38231
		24801	

NAME	Job Title	New Ext	VMB
Macken, Diana	Teacher	24804	38241
Madden, Julie	Teacher	24602	38447
McCormick, Karen	Education Specialist	24209	38388
Mitchell, Katie	Teacher	24802	38446
Patch, Rose	Teacher	24402	38382
Root, Allison	Teacher	24401	38247
Bartlett, Beth	Teacher	24803	
Soltes, Nita	Education Specialist	24902	38229
Steaffens, Cyndi	Teacher	24611	38226
Tibbetts, Lisa	Teacher	24103	38237
Volz, Alicia	Teacher	24901	38389
Bivin, Sunny	Teacher	24403	38235
	Learning Center	24101	
Sinclair, Lisa	Custodian	24551	
Dodd, Pauline	Kitchen	24550	
Bayer, Rachel	ASES	24107	
Ruiz, Lupe	Early Learning Academy	24702	
Albers, Annetta	State Preschool	24703	

**Georgia Brown Elementary**

Phone 805-769-1200

Fax 805-237-3426

NAME	Job Title	Ext	VMB	NAME	Job Title	Ext	VMB
Moses, Celia	Principal	23001		Magnuson, Fabiola	Teacher	23131	38517
Volle, Gabriela	Guidance Specialist	23018		Madonna, Esmeralda	Teacher	23103	38410
Jauregui, Claudia	Secretary	23002		Meurer, Denise	Teacher	23137	38408
Valle, Frances	Attendance clerk	23040		Michel-Schlitz, Araceli	Teacher	23110	38152
Boddington, Bernadette	Speech	23020		Mosely, Cynthia	Teacher	23114	38155
	Reception	23041		Quada, Sandra	Teacher	23117	38548
	Health Clerk	23201		Stanton, Nicole	Teacher	23119	38494
Vasquez, Tamara	Nurse/LVN	23201		Buchanan, Teresa	RSP	23020	
Cagliero, Tracy	Librarian	23015		Stout, Maribel	Teacher	23115	38147
	ComputerLab	23121		Tucker, Michele	Teacher	23116	38157
Anaya, Ana	Teacher	23109	38407	Usilton, Kristin	Teacher	23112	38428
Armendariz, Sylvia	Teacher	23128	38164	Vasquez, Nora	Teacher	23118	38317
Clark, Gabriela	Teacher	23106	38151	Velasco, Christina	Teacher	23107	38098
Carabantes, Marlene	Teacher	23104	38415	Zepeda, Veronica	Teacher	23108	38413
Castillo, Carolina	Teacher	23113	38372	Holland, Mario	Psych	23021	
Aguilar, Mayra	Teacher	23101			Interv/Counselor	23021	
Cooper, Heidi	Teacher	23111	38153	Ramirez, Gustavo	Custodian	23058	
Delbar, Nicole	Coach	23120	38013	PRYDE	upper grades	23129	
Delgado, Susan	Teacher	23102	38162	PRYDE	lower grades	23134	
					W.R.	23202	
Ezzell, Virna	Teacher	23135	38158	Rebollar, Rita	Kitchen	23158	
Faulkenberry, Christina	TOSA	23132	38468	Gomez, Marilu	First 5	23261	23228
Hagy, John	Teacher	23105	38102	Garcia Mendoza, Darinka	First 5	23262	

Virginia Peterson Elementary

Phone 805-769-1250

Fax 805-237-3497

NAME	Job Title	New Ext	VMB	NAME	Job Title	New Ext	VMB
Tatman, Maggie	Principal	26001		Maytubby, Nancy	Teacher	26102	38466
Hawley, Dawn	Secretary	26002		Rodriguez, Michelle	Teacher	26115	38405
Edwards, Megan	Clerk	26040		Smith, Nicole	Teacher	26114	38451
Munoz, Jessica	Psychologist	26018		Scheiffele, Julie	Teacher	26119	38218
Grace, Amy	Speech	26111		Vega-Moreno, Irma	Bilingual Advocate	26042	
Pafumi, Monica	Guidance Specialist	26016		Wilcox, Jessica	Intervention	26108	38111
Bradley, Debora	Nurse	26043					
Neri, Laura	Librarian	26015		Wilder, Starr	Teacher	26109	38434
	Library	26215		Wortman, Andrew	Teacher	26112	38216
	Lab	26250		Yarborough, Breta	Teacher	26116	38117
Scandalis, Heather	Teacher	26101	38520				
Asadoor, Jennifer	Intervention	26103	38125	Cisneros, Brian	Sp. Ed	26265	
Ezell, Brian	Teacher	26123	38450	Gamberutti, Kathy	M.L.	26264	
Bell, Jennifer	Teacher	26113	38119	Martin, Jolene	M.L.	26276	
Birkenfeld, Christine	Teacher	26117	38059		M.L.	26262	
Bivin, Sunny	Teacher	26118					
Donovan, Dena	Teacher	26106	38355	Leo Palacios	Custodian	26020	
Goldbach, Jill	Teacher	26107	38251	Jon Asadoor	Kitchen	26252	
Hamlin, Megan	Teacher	26104	38458	Bullard, Kayla	District Nurse	26271	
Harris, Diane	Teacher	26110	38139				
Norman, Jane	Speech	26128					



**Pat Butler Elementary**

Phone 805-769-1750

Fax 805-237-3496

NAME	Job Title	Ext	VMB	NAME	Job Title	Ext	VMB
Capalare, Damien	Principal	27001		Pafumi, Monica	Teacher	27115	
Walker, Stephenie	Guidance Specialist	27021					
Rodriguez, Maribel	Secretary	27002		Parks, Suzy	Teacher	27105	
Martin, Jillian	Clerk	27040		Pisor, Kevin	Teacher	27108	
				Price, Sandra	Teacher	27110	
Holland, Mario	Psychologist	27020		Pyper, Thomas	Teacher	27113	
Vermey, Doris	Nurse	27043		Reid, Jody	Teacher	27122	
Balderramma, Suzanne	Intervention Specialist	27119		Romero, Jeanine	Teacher	27112	
Lyn, Velta Nicole	Speech	27120		Scott, Nancy	Teacher	27114	
	Staff Lounge	27042		Smirl, Melena	Teacher	27101	
				Walker, Stephenie	Teacher	27121	
Callahan, Christy	TOSA	27116		Wingfield, Diane	Teacher	27109	
Boyd, Carlee	Teacher	27102			VAPA	27117	
Elisarraraz, Cheryl	Teacher	27106			Computer Lab	27050	
Halebsky, Stacey	RSP	27118		Greaves Ross, Sara	Library Tech	27015	
Horrel, Carol	Teacher	27103		PRYDE Portable C		27132	
Mayer, Nancy	Teacher	27107		Parks, Bill	Custodian	27045	
Moore, Jennifer	Teacher	27102			MPR	27009	
O'Grady, Macy	Teacher	27104			Food Service	27008	

**Daniel Lewis Middle School**

**Phone 805-769-1450**

**Fax 805-237-3458**

<b>NAME</b>	<b>Job Title</b>	<b>Ext</b>	<b>VMB</b>	<b>NAME</b>	<b>Job Title</b>	<b>Ext</b>	<b>VMB</b>
Vogenthaler, Michael	Principal	11001		Green, Kelly	Teacher	11261	38557
Young, Monica	Asst. Prin	11016		Haggmark, Jennelle	Teacher	11262	38192
Grennan, Melissa	Secretary	11002		Hoier, Suzanne	Teacher	11263	38193
Powel, Cindy	Registrar	11007		Kroener, Caramé	Teacher	11107	38248
Jenkins, Lucia	Attendance	11040		Laird, Kelsey	Teacher	11606	38179
Thomas, Jennifer	Psychologist	11017		Lewis, Jodi	Teacher	11602	38527
	Speech	11043		Lopez, Chris	Teacher	11502	38541
Healy, Megan	Counselor	11021		Macklin-Musial, Colleen	Teacher	11105	38174
Pedrin, Sadie	Counselor	11022		Managan, Tracy	Teacher	11241	38559
	Intervention Specialist			Marx, Tanner	Teacher	11235	38307
Vermy, Dorris	Nurse	11043		Mello, Lydia	Teacher	11604	38106
McCurry, Trixli	Librarian	11015		Nimick, Michelle	Teacher	11601	38205
Coulter, Darrell	Custodian	11244		Olson, Jake	Teacher	11502	38541
Anderson, Terri	Teacher	11501	38259	Proud, Leslie	Teacher	11272	38060
Ballinger, Lindsey	Teacher	11271	38228	Psaltis, Annemarie	Teacher	11603	38201
Berry, Tanner	Teacher	11605	38202	Puhek, Nick	Teacher	11204	38422
Cardenas, Chris	Teacher	11233	38191	Ring, Kristen	Teacher	11251	38188
Carlson, Savannah	Teacher	11106	38068	Robertshaw, Monika	Teacher	11252	38424
Chancellor, Brent	Teacher	11205	38048	Saporita, Marci	Teacher	11205	38431
Ehlers, Michelle	Teacher	11243	38489	Scribner, Jon	Teacher	11234	38182
Fletcher, Rebecca	Teacher	11401	38549	Seidel, Erin	Teacher	11242	38426
Fredrick, Shauna	Teacher	11104	38183	Sibucao, Jason	Teacher	11273	38418
Galvan, Santino	Teacher	11402	38555	Sivils, Alanna	Teacher	11224	38431
Gonzales, Tracie	Teacher	11607	38482	Ward, Justin	Teacher	11050	38430
Grace, Boomer	Teacher	11253	38175				

George Flamson Middle School

Phone 805-769-1400

Fax 805-237-3427

NAME	Job Title	Ext	VMB	NAME	Job Title	Ext	VMB
Carr, Audra	Principal	10001		Hutchings, John	Teacher	10406	38019
Isbell, Jennifer	Asst. Principal	10010		Kelson, Susan	Teacher	10210	38100
Brooks, Sandy	Secretary	10002		Knupper, Katelynn	Teacher	10503	38115
Ochoa, Angie	Attendance Clerk	10040		Knupper, Sue	Teacher	10402	38130
Olijarnyk, Irene	Registrar	10041		Lomanto, Sarah	Teacher	10407	38394
Hammond, Kenneth	Security	10007		Lorenz, Alex	Teacher	10551	38376
Bradshaw, Katrina	Counselor	10003		Lovejoy, Stephanie	Teacher	10601	38534
Fanning, Chal	Counselor	10005		Martin, Jolene	Teacher	10402	38327
				Martinez, Edwin	Teacher	10132	38160
McNeal, Kelly	Nurse	10043		Meidam, Cody	Teacher	10131	38406
Stoughton, Lindsey	Librarian	10015		Menke, Brent	Teacher	10122	38492
Penaloza, Julio	Psychologist	10227			Teacher		
Andersen, Ronalee	Teacher	10403	38002	Parks, Daniel	Teacher	10302	38159
Alltucker, Allison	Teacher	10221	38401	Perneel, Peter	Teacher	10207	38030
	Teacher			Sailer, Janelle	Teacher	10213	38223
Buckles, Darian	Teacher	10212	38010				
Burgh, Sheila	Teacher	10133					
Cronauer, Michael	Teacher	10211	38007				
	Teacher						
Derickson, Sara	Teacher	10304	38537				
Enriquez-Bague, Ruth	Teacher	10120	38351	Wahl, Nicole	Teacher	10307	38429
Galvin, Sonny	Teacher	10301	38287				
Griffin, Rick	Teacher	10501	38017				
	Teacher						
	Teacher						
Hong, David	Teacher	10404	38233	Cafeteria		10008	
Hooge, Kevin	Teacher	10303	38367	Custodian		10146	
Huggins, Alexandra	Teacher	10222	38479	Workroom		10651	

**Paso Robles High School**

Fax 805-237-3424

Phone 805-769-1500

NAME	Extension
AD14 Library Computer Lab	50031
AD15 Computer Lab	50061
Ag Office (Room 1131)	50685
Athletic Office (Room 502)	(805) 769-1570
<b>Attendance Office</b>	<b>(805) 769-1510</b>
Bearcat Hall	50026
Bearkitten Preschool	50331
Cafeteria	50008
College/Career Center	50030
Computer Lab (Room 110)	50110
Conference Room (Room 202)	50202
Counseling Office	(805) 769-1530
Crimson Newsmagazine	50033
Custodial Office	50014
Guard Shack	50070
Testing Center (Room 207)	50207
Library	(805) 769-1580
Nurse Office	50043
PE (Boys)	50543
PE (Girls)	50575
Student Store	50401
Welding Office	50688

NAME	Extension	Fax
Administration Fax		237-3424
Counseling		237-3499

Support Staff:	Ext.
Bryant, Janice (Psychologist)	
Carrasco, Minerva (Nurse)	50919
Clow, Gary (Campus Assistant)	50010
Curtis, Maria (Athletic Trainer)	50882
Health Care Lab	50881
Diasparra, Michelle (Psychologist)	50058
Dowell, Elizabeth (ASL Interpreter)	
Esquivel, Citlali (Family Advocate)	50062
Esquivel, Laura (Mental Health Therapist)	50145
Gardner, Scott (Campus Assistant)	50010
Hall, Jason (Para-Tech)	50516
Mahoney, Bob (Campus Assistant)	50010
Nurse Reception	50059
Ramos, Louis (Mental Health Therapist)	50210
Robasciotti, Kathryn (ASL Interpreter)	
Ruiz, Tony (School Resource Officer)	50116
Santos, Itzelt (CALSOAP)	50030
Silva, Karina (ASL Interpreter)	
Vasquez, Tammy (Nurse)	50043
Bryant, Janice (Psychologist)	50142
Virgil, Dustin (School Resource Officer)	50016
Wendorff, Kris (Occupational Therapist)	33105
White, Carmen (Speech Therapist)	50047
Williams, Tasha (Campus Assistant)	50010

Administrators:	Ext.
Overton, Anthony (Principal)	50001
Braxton, Gerald (Assistant Principal)	50028
Clayton, Jennifer (Guidance Counselor Specialist)	50023
Dineen, Jennifer (Assistant Principal)	50054
Godsey, Michael (Assistant Principal)	50004
Hamill, Stuart (Assistant Principal)	50006
Loney, Tori (Athletic Director)	50144

Counselors:	Ext.
Barajas, Cesar - EL Counselor	
Shatwell, Jessica - 9TH Grade	50020
Johnson, Natalee - 10TH Grade	50022
Thompson, Alexandra - 11TH Grade	50019
Soto, Lindsay - 12TH Grade	50021
Walker, Tara - College & Career Counselor	50025

Office Staff:	Ext.
Blue, Tiffany (Attendance Technician)	50013
Camacho, Laura (Counseling Clerk)	50009
Chavez, Jennifer (Registrar)	50007
Transcript Requests	50048
Garcia, Carmen (Bilingual Clerk)	50040
VACANT (Library Tech)	50015
VACANT (School Safety Dispatcher)	50010
Safety Administrator	50143
Long, Cherie (Principal's Secretary)	50002
Lowe, Stephanie (District Librarian)	50017
Santoro, Lea (Attendance Clerk)	50012
Taylor, Jennifer (Accounts Payable/ASB)	50050
Thompson, Amanda (Athletic Program Project Assistant)	50046
Myers, Katelyn (Counseling Secretary)	50024

Custodial Staff:	Ext.
Arzate, Maria	50014
Barrera, Maria (Night Lead Custodian)	50014
Duque, Alfredo	50014
Garcia, Adriana	50014
Gonzalez, Hector	50014
Guerrero, Adelaida	50014
Guzman, Carlos (Lead Custodian)	50014
Mendez, Bernardo	50014
Mendez, Margarita	50014
Orozco, Diana	50014
Ramirez, Sergio	50014

Para Educators:	
Bratz, Pamela	Lemos, Anh
Capps, Kim	Lewis, Tiffany
Greaver, Karen	Loewen, Jennifer
Hite, Cynde	Marquez, Angela
Hogan, Virginia	Marquez, Velia
King, Amber	
Klantz, Susanne	Schnoebelen-Verzin, Nancy
Kiiley, Anh	Segura, Maria
Legon, Emma	

Kitchen Staff:	Ext.
Bilderback, Linda	50008
Cardona, Evelyn	50008
Espig, Sandra	50008
Jaureguy, Virginia	50008
Lautz, Laura	50008
Mayo, Robin	50008
McCasland, Nicole	50008
Morones, Marian	50008
Oconnor, Renee	50008
Weis, Mary Ann	50008

PRHS Department Chairs & Advisors:	Ext.	VMB
Agriculture/Industrial Arts, Theresa Clark	50686	38272
Career Technical Education, Shelby LaMendol	50939	38440
English Department, Sarah Ramirez	50930	38304
Foreign Language, Jennifer Fuller	50913	38286
Journalism, Jeff Mount	50533	38309
Mathematics, Rich Schimke	50803	38323
Physical Education, Derek Stroud	50543	38335
Science Department, J. P. Ewing	50305	38282
Special Education, Michael Sauret	50109	38560
Social Studies, Seth Draine	50105	38203
Visual/Performing Arts, Jennifer Bedrosian	50510	38258
Yearbook, J. Mount	50533	38309

Paso Robles High School

Phone 805-769-1500

Fax 805-237-3424

NAME	Job Title	Ext.	VMB
Aleman, Florentino	Teacher	50932	38183
Allan, Ryan	Teacher	50206	38507
Anderson, Sophia	Teacher	50947	
Askew, Ryan	Teacher	50111	38348
Baker, Gwendolyn	Teacher	50203	38374
Baldovin, Carrie	Teacher	50933	38257
Barringer, Robyn	Teacher	50934	38396
Bedrosian, Jennifer	Teacher	50510	38258
Blackketter, Jonathan	Teacher	50209	38221
Boswell, Greg	Teacher	50603	38262
Bredensteiner, Alisa	Teacher	50403	38265
Brooks, Taylor	Teacher	50506	38547
Brunner, Joy	Teacher	50201	38266
Cantrell, Aaron	Teacher	50946	38268
Carroll, Matt	Teacher	50931	38397
Cera, Humberto	Teacher	50904	38089
Clark, Evan	Teacher	50921	38012
Clark, Theresa	Teacher	50686	38272
Cline, Chris	Teacher	50941	38066
Cordoba, Elizabeth	Teacher	50938	38503
De Cou, Steven	Teacher	50307	38505
Diaz, Daniel	Teacher	50306	38261
Diaz, Erica	Teacher	50204	38589
Dowling, Melody	Teacher	50923	38044
Draine, Seth	Teacher	50105	38203
Drake, Matt	Teacher	50102	38281

Emmons, Chris	Teacher	50924	38360
Engel, Alexander	Teacher	50103	38148
Ewing, Gaylene	Teacher	50309	38352
Ewing, Jon-Paul	Teacher	50305	38282
Felgenhouer, JR	Teacher	50543	38150
Frey, Bartt	Teacher	50605	38285
Fuller, Jennifer	Teacher	50913	38286
Gardner, Amanda	Teacher	50683	38009
Goodin, Kurtis	Teacher	50801	38456
Goodnow, Marcy	Teacher	50505	38289
Greer, Lynda	Teacher	50304	38351
Gwiazda, Joshua	Teacher	50508	38291
Harrison, Coleen	Teacher	50922	38553
Heinrich, Hilary	Teacher	50805	38055
Holtz, Evan	Teacher	50302	38136
Johnston, Evan	Teacher	50301	38490
Jordan, Lori	Teacher	50914	38399
Karamitsos, Cora	Teacher	50308	38457
Kerr, Clark	Teacher	50813	38296
Kijewski, Kevin	Teacher	50945	38018
Lamb, Katelynn	Teacher	50405	38501

NAME	Job Title	Ext.	VMB
LaMendola, Shelby	Teacher	50939	38480
Land, Geof	Teacher	50104	39298
Lechuga, Kristy	Teacher	50815	38414
LeClair, Kevin	Teacher	50943	38404
Lincoln, Amanda	Teacher	50410	38525
Logan, Angela	Teacher	50106	38347
Loney, Tori	Teacher	50195	38377
Lopez, Christopher	Teacher		
Maksim, Chester	Teacher	50408	38039
Martinez, Jeny	Teacher	50107	38185
Matthysse, Brenda	Teacher	50110	38361
McEntire, Jasmin	Teacher	50407	38403
McPherson, Deborah	Teacher	50113	38179
Moore, Collin	Teacher	50543	38142
Morris, Rebecca	Teacher	50935	38057
Mount, Jeff	Teacher	50604	38309
Palermo-Blakely, Denise	Teacher	50212	38508
Phillips, Christopher	Teacher	50109	
Pickard, Justin	Teacher	50688	38315
Ramirez, Sara	Teacher	50930	38304
Reid, Christina	Teacher	50936	38496
Roberts, Maggie	Teacher	50114	38319
Sanchez, Joseph	Teacher	50601	38529
Sauret, Michael	Teacher	50109	38560
Schimke, Rich	Teacher	50803	38323
Scoggins, Marisa	Teacher	50940	38563
Smith, Christopher	Teacher	50112	38253
Smith, Judy	Teacher	50802	38422
Steaffens, Jim	Teacher	50812	38334
Stover, Heather	Teacher	50108	38483
Stroud, Derek	Teacher	50643	38335
Stroud, Dewey	Teacher	50542	38336
Talbert, Haley	Teacher	50942	38562
Tankersley, Jette	Teacher	50208	38464
Useda, Tyler	Teacher	50949	38446
Valendez, Zoe	Teacher	50948	
Vengoechea, Nicole	Teacher	50409	38535
Wagner, Kolby	Teacher	50804	38592

Wagner, Ted	Teacher	50814	38339
White, Adam	Teacher	50404	38497
Wilshusen, Codie	Teacher	50575	38583
Wilson, Clarissa	Teacher	50507	38172
Witman, Alicia	Teacher	50944	38500
Witman, Michael	Teacher	50915	38538
Woodruff, Stacy	Teacher	50986	38260
Ybarra, Nathaniel	Teacher	50205	38455



Homeschool - Paso Robles Independent Study Center (PRISC)

Phone 805-769-1675

Fax 805-237-3374

NAME	Job Title	Ext	VMB	NAME	Job Title	Ext	VMB
Sharon, Dan	Principal	51555		Anderson, Mary Jo	Teacher	51525	
Butterfield, Wendy	Secretary	51510		Warnes, Paula	Teacher	51515	

**Independence High School**

Phone 805-769-1620

Fax 805-237-3374

<b>NAME</b>	<b>Job Title</b>	<b>Ext</b>	<b>VMB</b>	<b>NAME</b>	<b>Job Title</b>	<b>Ext</b>	<b>VMB</b>
Sharon, Dan	Principal	51555		Rudman, Christine	Teacher	51551	
Butterfield, Wendy	Secretary	51510					
Bean, Debra	Teacher	51554	38069				
Bockelman, Karen	Teacher	51563					
Bodenshot, Rachelle	Teacher	51583		Staff Break Room		51500	
Nelson, Randy	Teacher	51553					



## Public comment at board meetings: What board members need to know

As made clear by California's Brown Act, public agencies, including school districts and county offices of education, "exist to aid in the conduct of the people's business . . . The people of this State do not yield their sovereignty to the agencies which serve them." (Government Code section 54950.)

Board meetings must provide an opportunity for the public to address the board on items of public interest within the board's jurisdiction. (Government Code section 54954.3.) For any item on the agenda, the public must have the opportunity to address the board prior to or during the board's consideration of the item. At a regular meeting, the public is also permitted to comment on matters not on the agenda.

California law imposes important guidance on how and when boards can regulate public comment. Boards are tasked with finding a balance between ensuring sufficient time for individual speakers and sufficient time for comment from the entire community present at the meeting, and to complete a meeting with a lengthy agenda within a reasonable period of time. Boards are also tasked with keeping order at the meetings, ensuring an orderly discussion and exchange of information, with the ability to remove speakers who disrupt a meeting, if necessary. These laws allow boards to create reasonable limitations on public comment, within the framework of protecting the public's right to participate and allowing the flow of ideas and viewpoints for the board's consideration.

Boards should set procedures for meeting conduct through their board policies, including the procedures for public comment. CSBA's model Board Bylaw 9323 provides an important resource for boards in conducting meetings and regulating public comment.

Boards will often have the board president recognize the speaker and then proceed to comment, ideally as briefly as the subject permits. The board president may rule on the appropriateness of a topic raised by a speaker if a topic would be suitably addressed at a later time, but the board shall not prohibit public criticism of the district or its employees, no matter how harsh. As a California court wrote in finding a school board could not censor particular speech at its board meeting, the board's policy could not impinge

"upon the public's First Amendment rights, which rights include the right to be passionate and even uninformed in the expression of one's views." (*Baca v. Moreno Valley USD*, 936 F.Supp.719 (1996).)

Government Code section 54954.3 authorizes boards to set reasonable limits on the total amount of time allocated for public comment on a particular issue and for each individual speaker, and many boards set specific time allowances in their policies. Often, individual speakers will be allowed three minutes to address the board on each agenda or non-agenda item, and the board will limit the total time for public input on each item to 20 minutes. However, in exceptional circumstances when necessary to ensure full opportunity for public input, the board president may, with board consent, adjust the amount of time allowed for public input and/or the time allotted for each speaker.

Board members should be clear that this ability to limit the time for individual speakers, and for public testimony on a particular topic, is meant to further the law's goal of allowing the public an adequate opportunity to speak to the board. Any adjustments to speaking time must be done equitably so as to allow a diversity of viewpoints, but the board president may ask members of the public with the same viewpoint to select a few individuals to address the board on behalf of that viewpoint. Board members should note as well that under Government Code section 54954.3, in order to ensure that non-English speakers receive the same opportunity to directly address the board, any member of the public who uses a translator shall be provided at least twice the allotted time to address the board, unless simultaneous translation equipment is used to allow the board to hear the translated public testimony. **S**

*Please note that the information provided here by CSBA is for informational purposes and is not legal advice. Please contact your legal counsel for questions related to this information.*

California  
schoolnews

### staff

**Senior Director of Communications:**  
Troy Flint | tflint@csba.org

**Managing Editor:**  
Kimberly Sellery | ksellery@csba.org

**Marketing Director:**  
Serina Pruitt | spruitt@csba.org

**Staff Writers and Contributors:**  
Andrew Cummins | acummins@csba.org  
Alisha Kirby | akirby@csba.org  
Aaron Davis | adavis@csba.org  
Briana Mullen | brmullen@csba.org  
Mike Ambrose | mambrose@csba.org

**Graphic Design Manager:**  
Kerry Macklin | kmacklin@csba.org

**Senior Graphic Designer:**  
Mauricio Miranda | mmiranda@csba.org

### officers

**President:**  
Xilonin Cruz-Gonzalez | Azusa USD

**President-elect:**  
Suzanne Kitchens | Pleasant Valley SD

**Vice President:**  
Susan Heredia | Natomas USD

**Immediate Past President:**  
Emma Turner | La Mesa-Spring Valley SD

**CEO & Executive Director:**  
Vernon M. Billy

*The California School Boards Association is the essential voice for public education. We inspire our members to be knowledgeable leaders, extraordinary governance practitioners and ardent advocates for all students.*

California School News (ISSN 1091-1715) is published 11 times per year by the California School Boards Association, Inc., 3251 Beacon Blvd., West Sacramento, CA 95691. 916-371-4691. \$4 of CSBA annual membership dues is for the subscription to California School News. The subscription rate for each CSBA nonmember is \$35. Periodicals postage paid at West Sacramento, CA and at additional mailing office. POSTMASTER: Send address changes to California School News, 3251 Beacon Blvd., West Sacramento, CA 95691.

News and feature items submitted for publication are edited for style and space as necessary.

csba  NSBA   
CALIFORNIA SCHOOL BOARDS ASSOCIATION

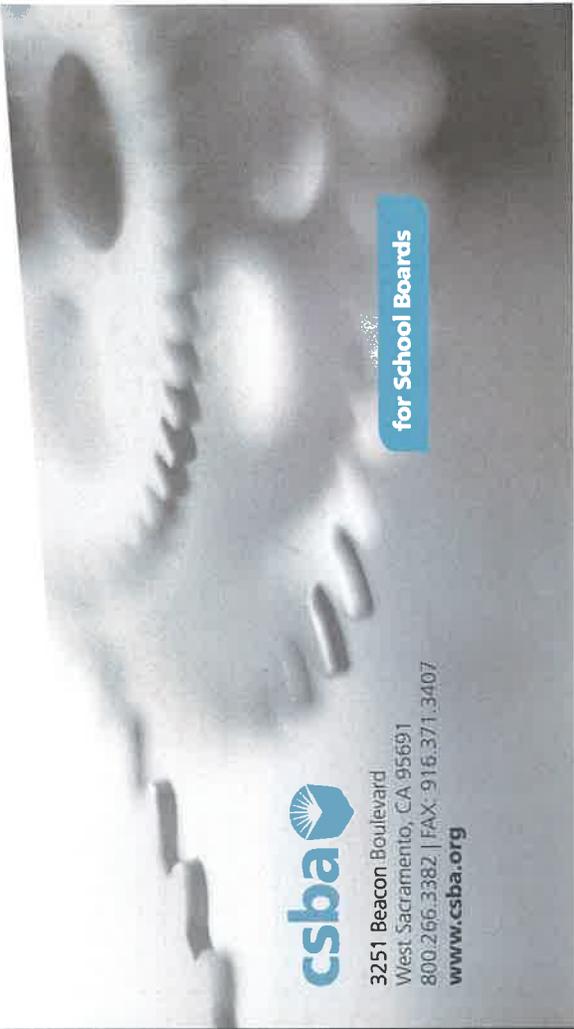
Public oversight of local government is the foundation of American democracy. Nowhere is this more evident than in our public schools, where local boards of education are entrusted by their diverse communities to uphold the Constitution, protect the public interest in schools and ensure that a high quality education is provided to each student. To maximize the public's confidence in local government, our local boards must govern responsibly and effectively.

## Professional Governance Standards



3251 Beacon Boulevard  
West Sacramento, CA 95691  
800.266.3382 | FAX: 916.371.3407  
[www.csba.org](http://www.csba.org)

for School Boards



# Professional Governance Standards

The California School Boards Association (CSBA), representing nearly 1,000 local school districts and county boards of education, recognizes there are certain fundamental principles involved in governing responsibly and effectively. These principles — or Professional Governance Standards — reflect consensus among hundreds of board members, superintendents and other educational leaders throughout the state.

These Professional Governance Standards describe the three components vital to effective school governance:

1. *the attributes of an effective individual trustee,*
2. *the attributes of an effective governing board, and*
3. *the specific jobs the board performs in its governance role.*

The intent of these standards is to enhance the public's understanding about the critical responsibilities of local boards and to support boards in their efforts to govern effectively.

## 01

### the Individual Trustee

In California's public education system, a trustee is a person elected or appointed to serve on a school district or county board of education. Individual trustees bring unique skills, values and beliefs to their board. In order to govern effectively, individual trustees must work with each other and the superintendent to ensure that a high quality education is provided to each student.

#### To be effective, an individual trustee:

- » Keeps learning and achievement for *all* students as the primary focus.
- » Values, supports and advocates for public education.
- » Recognizes and respects differences of perspective and style on the board and among staff, students, parents and the community.
- » Acts with dignity, and understands the implications of demeanor and behavior.
- » Keeps confidential matters confidential.
- » Participates in professional development and commits the time and energy necessary to be an informed and effective leader.
- » Understands the distinctions between board and staff functions, and refrains from performing management responsibilities that are the responsibility of the superintendent and staff.
- » Understands that authority rests with the board as a whole and not with individuals.

## 02

### the Board

School districts and county offices of education are governed by boards, not by individual trustees. While understanding their separate roles, the board and superintendent work together as a "governance team." This team assumes collective responsibility for building unity and creating a positive organizational culture in order to govern effectively.

#### To operate effectively, the board must have a unity of purpose and:

- » Keep the district focused on learning and achievement for all students.
- » Communicate a common vision.
- » Operate openly, with trust and integrity.
- » Govern in a dignified and professional manner, treating everyone with civility and respect.
- » Govern within board-adopted policies and procedures.
- » Take collective responsibility for the board's performance.
- » Periodically evaluate its own effectiveness.
- » Ensure opportunities for the diverse range of views in the community to inform board deliberations.

## 03

### the Board's Jobs

The primary responsibilities of the board are to set a direction for the district, provide a structure by establishing policies, ensure accountability and provide community leadership on behalf of the district and public education. To fulfill these responsibilities, there are a number of specific jobs that effective boards must carry out.

#### Effective boards:

- » Involve the community, parents, students and staff in developing a common vision for the district focused on learning and achievement and responsive to the needs of all students.
- » Adopt, evaluate and update policies consistent with the law and the district's vision and goals.
- » Maintain accountability for student learning by adopting the district curriculum and monitoring student progress.
- » Hire and support the superintendent so that the vision, goals and policies of the district can be implemented.
- » Conduct regular and timely evaluations of the superintendent based on the vision, goals and performance of the district, and ensure that the superintendent holds district personnel accountable.
- » Adopt a fiscally responsible budget based on the district's vision and goals, and regularly monitor the fiscal health of the district.
- » Ensure that a safe and appropriate educational environment is provided to all students.
- » Establish a framework for the district's collective bargaining process and adopt responsible agreements.
- » Provide community leadership on educational issues and advocate on behalf of students and public education at the local, state and federal levels.

# Governance Brief

## Defining Governance, Issue 1

### Committed to strengthening local governance.

#### Why Governance Matters

*"The first and never forgotten objective must be that every human product of our educational system must be given the training that will enable him to be an effective citizen, appreciating his opportunities and fully willing to assume his responsibilities in a great democracy."*

**John Hannah, President**  
*Michigan State College, 1944*

In a 2013 essay, *Reinventing Citizenship As Public Work: Citizen-Centered Democracy and the Empowerment Gap*, Harry C. Boyte proposes that our understanding of democratic citizenship must be recast as public work. He suggests that we must shift our concept of our role as citizens from consumers to producers. Our democratic society was built upon such agents of change—citizens who banded together to do what needed to be done: "build forts, roads, libraries and schools." What needs to be done now to solve the serious problems we face—hunger, poverty, inequality, and crime—make these initial challenges seem small by comparison.

The powers that must be brought to bear upon these challenges come in three forms: organized people, organized money and organized knowledge. K-12 schools and post-secondary institutions are the primary means through which our system of government and our culture's knowledge are communicat-

ed and advanced. Schools teach knowledge. They also teach students how elections work and the importance of voting, how laws are passed, and how the branches of government work together—or don't. Schools teach democracy. These are important and necessary, but not sufficient.

Schools, like the work place, also engage their participants in activities that parallel community-based organizing. Boyd suggests that the workplace furthers democratic citizenship by "convening strangers from diverse backgrounds and inducing them to work together toward shared objectives..." Schools also bring together students from different backgrounds, engaging them in cooperative efforts and instilling in them the "civic skills of participation, communication and compromise..." Schools can engage students in democracy.

Schools do even more than this: they model citizen-centered democracy through the governance of the institution itself. School governance is the practice of the very same kind of democracy established by our country's founding fathers and born in the Declaration of Independence. School board members provide citizen oversight of our public schools, and are called to model the kind of participative democracy that brought our nation so far in two short centuries, and must move our schools boldly into the future.

Our country desperately needs schools that are committed to teaching and engaging young people in the practice of democratic citizenship. The commitment to this vision and the allocation of local resources are decisions the board must make. The manner in which the board makes these decisions models citizen-centered democracy. Thus, the importance of a clear and coherent understanding of how local school governance can be most effective is directly related to one of our most

important goals as a free society—that every student can become “an effective citizen, appreciating his opportunities and fully willing to assume his responsibilities in a great democracy.”

## Defining Governance

The purpose of the **Defining Governance** series is to summarize the attributes and practices of effective school boards identified in school governance research and literature for board members, educators, and local communities. As a first step, it is important to clarify what the term actually means. This issue focuses on establishing a definition of school governance. Subsequent issues of the series will explore four domains of effective governance that emerged from a review of governance research and literature. Effective boards are intentional about establishing and aligning these areas:

1. Governance commitments—Clarifying the board’s unifying agreements that serve as the foundation for a cohesive and effective governing board.
2. Governance practices—Observing specific governing activities that are expressions of their commitments and increase their capacity to make governing decisions.
3. Governance decisions—Taking action to provide direction, align resources, and ensure accountability.
4. Community engagement—Creating intentional processes to learn the interests of the communities they represent, engage them in district efforts, and report to them about district performance.

### What is school governance?

A working definition emerges from a combination of concepts of governance in general, concepts about school governance, the purpose and complexity of K-12 education, the role of school boards, and the nature of school board authority defined in law.

### How is governance generally defined?

Government, for-profit, and non-profit / philanthropic entities offer similar definitions for governance. For profit (corporate) governance has been described as “the framework of rules and practices by which a board

of directors ensures accountability, fairness, and transparency in a company’s relationship with its stakeholders.” The International Federation of Accountants published a 2001 report entitled *Governance in the Public Sector—A Governing Body Perspective* which offers that “Governance is concerned with structures and processes for decision-making, accountability, control, and behavior at the top of organizations.” A 2009 article in *Australian Philanthropy* defines governance as the “framework of rules, relationships, systems, and processes within and by which authority is exercised and controlled.”

### How is the governance of schools described?

At first glance, the definitions above could be applied to school boards generally, but they do not account for the differences between school boards and other elected governing bodies or other for-profit and non-profit entities. A Wallace Foundation report, *Redefining and Improving School District Governance* (2006), posits a definition that applies to all levels of education from federal to local, that “...governance creates the framework through which high-quality leadership can be exercised throughout the educational system.” The National School Boards Association’s *Key Work of Boards Guidebook* (Gemberling et al., 2000) describes school governance as creating “the conditions under which excellent teaching and accelerated student performance will take place” This definition describes what boards must do: create conditions. Doug Eadie (2006) focuses on actions that boards take to create those conditions: “...making decisions and judgments... that actually determine the shape and direction of the district” in the areas of strategic direction, operations planning, and performance monitoring.

### How does the purpose and complexity of K-12 education affect the definition of school governance?

The governance of any organization must be partly defined by its desired ends. One of the over-arching purposes of K-12 schools is to ensure that all students are prepared for post-high school success. Achieving this is the work of education professionals with special training. The requisite knowledge and skills have become more specialized over the decades and boards have increasingly looked to the expertise provided by the superintendent and staff, since this expertise is

not required or expected of board members. In addition, the business of schools has also become increasingly complex. It is “heavily statutorily regulated, usually unionized, responsible for large employment costs, policy-laden, and financially challenged” (Van Clay et al., 2009). As a result, boards have increasingly looked to the professional staff for research-based and field-tested practices that inform the board regarding what the district ought to do.

## How do the roles of school board members affect the definition of school governance?

Board members often face conflicting role expectations that arise from the nature of representational governance and the laws pertaining to school governance in California. These differences create three lenses through which individuals and boards exercise their duties. (Kowalski, 2008)

### Representative role

School boards are elected or appointed to serve the community, so individually and collectively board members have a responsibility to ensure that their governing work is informed by the values and interests that the community has for its schools. Community input is critical; it informs the board what the community wants the district to do for its students.

Trustee area representation within a district can confuse this role. Board members may be elected at large to represent a trustee area, or elected only by the residents of the trustee area. This can create tension, especially if trustees have different understandings and beliefs about this role. Regardless of this distinction, all board members have the same obligations: to understand their constituents interests. With trustee areas, each of the board members brings community perspective to the governing table so that all board members have a shared understanding of the unique needs and interests of each of the trustee areas. With this understanding, boards make decisions in the best interest of all students and the long-term stability of the district.

The representational role can be endangered by low voter turnout. In a recent election in Austin Texas, school board election turnout was less than three percent of registered voters (Rotherham, 2012, p. 12). With so few voters, local school board elec-

tions can be significantly shaped by special interest groups, who may exert a disproportionate influence on the outcome. A second challenge that communities face is a lack of clarity of the authority and role of local school boards, and the skills and characteristics that most often result in effective board service. The representational role of the board is strengthened when communities: 1) understand the role of the board, 2) help to identify high-quality candidates, and 3) participate in local elections. (Rotherham, 2012, p.6)

### Enforcement role

There are some things that boards must do, regardless of public sentiment. California Education Code 35161 mandates that boards “...shall discharge any duty imposed by law upon it...” In this role, boards must ensure that the district is legally compliant with state and federal law, including ensuring that all district policies remain consistent with the California code as laws change. This can create a conflict for boards—when the local community supports a course of action that is inconsistent with legal requirements.

### Fiduciary

Boards have a fiduciary obligation to ensure the financial health and long-term stability of the district. Boards must hold the assets and resources of the districts in trust—literally acting in the district’s best interests. The fiduciary role requires boards to balance costs for operations and change initiatives with district capacity. Therefore, one of the key responsibilities of the board is to monitor district revenues and expenditures throughout the year. The annual calendar for the board’s budget oversight activity is established in law including budget adoption, first and second interim reports, unaudited year-end financial reports, and an annual audit. This role focuses the board on what the district is able to do.

These three roles, combined with complexity of the K-12 education, create a framework of four perspectives within which boards govern:

- the community perspective: what stakeholders *want the schools to do*;
- the legal perspective: what the law says the schools *must do*;

- the professional perspective: what educators say the schools *ought to do*; and,
- the fiduciary perspective: what the schools are *able to do*.

## How does state law impact the definition of school governance?

Boards of education in California's K-12 school districts and county offices of education receive their governing authority from state law. California law specifies what board must do, may do, and may not do. These are contained in multiple education and government codes too numerous to summarize or analyze here. There are, however, three specific codes that establish the general scope of school board authority.

- Education Code 35160: "On and after January 1, 1976, the governing board of any school district may initiate and carry on any program, activity, or may otherwise act in any manner which is not in conflict with or inconsistent with, or preempted by, any law and which is not in conflict with the purposes for which school districts are established."
- Education Code 35160.1(b): "...It is the intent of the Legislature that Section 35160 be *liberally construed* to effect this objective."
- Education Code 35161: "The board...
  - » *may execute* any powers delegated by law to it...
  - » *shall discharge* any duty imposed by law upon it...
  - » *may delegate* to an officer or employee of the district any of those powers or duties. The governing board, however, *retains ultimate responsibility* over the performance of those powers or duties so delegated."

Governance is generally best practiced at a very high-level of review, focusing on long-term strategy and systemic performance and accountability. Training for school board members often encourage boards to operate "at 30,000 feet." However, Education Code also requires California school boards to review and approve a wide range of operational decisions—moving board activity closer to "ground level," much closer to the district operations. Boards are encouraged not to micro-

manage, yet the board is asked to approve managerial level decisions. Examples are often found on the consent agenda—where the board is asked to approve a series of routine district business matters. This tension will be explored more fully later in the series, but it is important to note that boards practice different levels of direction and oversight—often within a single meeting.

While California code provides broad authority for boards to act, it also very narrowly defines how and when boards exercise these governing powers. Boards are authorized to:

- Take action only at meetings open to the public. [Education Code 35145, with some exceptions outlined in Government Code 54954.2]
- Take action only on items listed on the board's agenda—posted 72 hours in advance. [Government Code 54954.2 with some exceptions for emergencies and other qualifying criteria.]
- Take action only by a formal vote of the board majority. [Education Code 35163-4]

It is important to clarify that neither California Education Code nor Government Code grant any authority to individual school board members. The board's power is collective only, and only when they convene at publicly-noticed meetings that are open to the public.

## Definition

By combining the general concepts of governance, the purpose of K-12 education, the professional and operational complexity of K-12 education, the various roles of board members, and the nature of school board authority granted in state law, a possible definition emerges.

*School boards ensure success for all students by making decisions that fulfill legal mandates and align district systems and resources to ensure the long-term fiscal stability of the district. Boards must act collectively and openly, be guided by community interests, and informed by recommendations of the superintendent and professional staff.*

Definition language	Definition elements (criteria)
School boards ensure success for all students	Boards ensure the ultimate purpose (mission and vision) of the district.
by making decisions	Boards are granted broad decision-making authority in California Education Code.
that fulfill legal mandates and	Boards have an enforcement role.
align district systems and resources to ensure long-term fiscal stability of the district.	Boards have a fiduciary role to hold the best interests of the district and students in trust.
Boards must act collectively and openly,	Boards have only collective authority. Board meetings are open to the public (with certain exceptions permitted in law).
be guided by community interests, and	Boards have a representative role.
informed by recommendations of the superintendent and professional staff.	Boards rely on the professional judgment of educational leaders.

### How can boards use the Defining Governance series?

This series can provide a structure for conversations at board meetings and between board members and the community to raise awareness and increase understanding about what school governance means. Suggestions:

- Add board development to your regular board agenda. Set aside 10 to 15 minutes for board members to discuss the series and its implications for your local governing board.
- Post a copy or link to the series on the district website for parents and community members.
- Share it with district partners, local government agencies, and other local groups.
- Ask for it to be placed on the agenda of your county school boards association for discussion.

### Sources

Boyte, H., (2013). *Reinventing Citizenship As Public Work: Citizen-Centered Democracy and the Empowerment Gap*, Kettering Foundation

Eadie, D., (2006). *Five Habits of High Impact School Boards*.

Gemberling, K., Smith J., & Villani, S. (2000). *Key Work of Boards Guidebook*. NSBA.

Kowalksi, T., (2008). *School Reform, Civic Engagement, and School Board Leadership, The Future of School Board Governance: Relevancy and Revelation*; Rowan & Littlefield Education.

Plecki, M., et al., (2006). *Redefining School District Governance*, Center for the Study of Teaching and Policy.

Rhim, L., (2013). *Moving Beyond the Killer B's: The Role of School Boards in Accountability and Transformation*, Academic Development Institute.

Rotherham, A. & Mead, S., (2012). *School Board Case Studies*, Institute for a Competitive Workforce.

Van Clay, M. & Soldwedel, P., (2009). *The School Board Field Book*, Solution Tree.

Ward, D., (2009, Winter), *Governance: The Need to Know*, Australian Philanthropy, 6.

## Online sources

BusinessDictionary.com. "corporate governance."  
Access July 8, 2013.

**[www.businessdictionary.com/definition/corporate-governance.html](http://www.businessdictionary.com/definition/corporate-governance.html)**

California Government Code section 54954.2

California Education Codes sections 35145; 35163-4;  
35160



February 2014

# Governance Brief

## Defining Governance, Issue 2

Governing Commitments

This is the second in the Defining Governance series, which summarizes what school governance research and literature has to say about the attributes of effective school boards. The first issue developed a definition for school governance. This issue focuses on governance commitments. Effective school boards create and abide by governing agreements to which they mutually commit. These agreements are achieved through deep discussions that result in mutual understanding and common ground in three critical areas: board core beliefs, board and board-superintendent partnerships, and board values, norms and protocols.

### Effective school boards commit to core beliefs

These commitments include establishing overarching values and beliefs they share about public education, governance, students and the district that help them transcend their individual differences to develop a cohesive board.

#### Public Education

In order to support the district mission, it's important for board members to articulate a clear and coherent set of beliefs around the purpose of public education. Gemberling and others assert that "Building a shared vision requires that you first are able to agree on your core values and beliefs. Knowing what you really value individually and collectively guide your aspirations and your mission as a district."<sup>1</sup>

**School governance defined:** *School boards ensure success for all students by making decisions that fulfill legal mandates and align district systems and resources to ensure the long-term fiscal stability of the district. To do this, boards must act collectively and openly, be guided by community interests, and informed by recommendations of the superintendent and professional staff.*

#### Governance

Eadie identifies concentrating on governing as an essential habit of effective boards. In order to be effective, school boards must develop a coherent understanding of what it means to govern. Board members should discuss thoroughly the purpose and functions of governance, and the value of "high-quality, citizen-owned and -led public education..."<sup>2</sup> These conversations are critical because beliefs and values drive behavior. When board members have conflicting beliefs and understandings about governance, it can lead to confusion as board members practice their governing roles in different and sometimes contradictory ways. Creating clarity among all governing team members about the purpose, definition and attributes of good governance is a key step to building and maintaining the trust that is necessary for board members to work effectively with each other and the superintendent.

## Students and staff

Core beliefs about students have been correlated with high student achievement. The Lighthouse Study found that "...board members in high-achieving districts had more elevating views of their students' potential..."<sup>3</sup> This is consistent with CSBA's Professional Governance Standards, but constitutes a more prescriptive standard than keeping "learning and achievement for all students as the primary focus."<sup>4</sup> Boards that positively impact student achievement do more than simply focus on student achievement; they believe their students are capable of achieving it. Board member beliefs and attitudes about the capacity of the district are also important. The findings of the Iowa Lighthouse Study were not limited to attitudes about students. "Board members in high-achieving districts had...more confidence in district staff's capacity to effect gains ..."<sup>5</sup>

Effective school boards invest time and effort in reaching clarity around their core beliefs regarding the purpose of public education, the characteristics of good governance, the ability of all students to learn and the capacity of the district to perform well. These core beliefs are foundational to establishing mutual trust that board members have in each other and in the superintendent regarding their individual and collective intent in leading the district.

## Effective school boards establish productive partnerships

CSBA specifically identified the importance of the board-superintendent relationship: "Effective school boards lead as a united team with the superintendent, each from their respective roles, with strong collaboration and mutual trust."<sup>6</sup> In addition to being supported by the work of Delagardelle and Eadie, this concept is upheld by Don McAdams. "Board members have numerous and complex relationships... Of all of these the most important are the relationships board members have with one another and with the superintendent."<sup>7</sup> A Wallace Foundation report concluded "having a strong school board-superintendent relationship is viewed as paramount to achieving school and district success..."<sup>8</sup> The importance of this partnership is consistent with the research of Waters & Marzano, whose meta-analysis identified "a significant correlation between the superintendent's relationship with the board president and board alignment with and support of achievement goals."<sup>9</sup> Plecki and others note that "Having a strong school board-superintendent relationship is viewed as paramount to achieving school and district success..."<sup>10</sup>

Research on nonprofit boards confirms the importance of the board-director relationship. BoardSource, dedicated to training non-profit boards, identifies this as one of its core principles for effective governance: "Exceptional boards govern in constructive partnership with the chief executive, recognizing that the effectiveness of the board and chief executive are interdependent."<sup>11</sup> Researchers Douglas Jackson and Thomas Holland identified six board competencies essential for effective governance including "the board nurtures the development of its members as a group; it tends to the board's collective welfare, and fosters a sense of cohesiveness."<sup>12</sup> Rotherman and Mead found that "Superintendents play a key role in ensuring good relations with their boards and among board members."<sup>13</sup>

The concept of partnership subtly shifts CSBA's idea of a 'governance team' where the board and superintendent lead together within their respective roles. This is still true, however, teams usually consist of equal members. Partnership is different; it includes people who are not on the same team. They have different roles with shared goals they mutually pursue. Partnership conveys the concept of mutual dependence, but not equality. Superintendents and board members are not the same, but each needs the other to be successful. Board members are usually not professional educators and have neither the special training nor the experience necessary for educational leadership. Superintendents do have these qualities, but they are not elected officials and cannot perform the governance functions that community-elected board members fulfill.

Effective boards are intentional about maintaining productive relationships between board members, and between the board and the superintendent. They set aside time to specifically discuss the quality of the relationship, clear up misunderstandings, and strengthen trust.

## Effective school boards clarify values, norms and protocols

Values, norms and protocols help boards clarify their collective beliefs, how they will work together, and the procedures they will follow to manage board operations. Values are the principles and ideals that serve as the foundation of board culture. The board and superintendent must specifically articulate the values that will guide their working relationship. These values help answer the question: "What do you need from each other to function well as an effective group?" CSBA's professional governance standards speak directly to the question of values, and specifically mention openness, trust, integrity, civility and respect.

Norms are the behavioral expectations that board members have for one another. While his concepts regarding organizational health are directed at executive teams, Patrick Lencioni's work is pertinent to boards. Lencioni proposes that the question "How do we behave?" is second only to the question "Why do we exist?" because any group of people responsible for the leadership of an organization must be cohesive, and this cohesion cannot be achieved without clear agreements on the behavior members expect from each other.<sup>14</sup> Values answer the question: "What do we stand for and believe in?" Norms answer the question: "What does that look like as we interact with one another?"

Protocols are the board's operational procedures that clarify how the board does its work. BoardSource emphasizes the importance of reaching clarity in board operations. "Exceptional boards purposefully structure themselves to fulfill essential governance duties and to support organizational priorities. Making governance intentional, not incidental, exceptional boards invest in structures and practices that can be thoughtfully adapted to changing circumstances."<sup>15</sup> Don McAdams' work on reform governance for urban schools makes the same point for school boards. "Without effective processes ... governance is difficult, maybe impossible."<sup>16</sup> Protocols for school boards should address four key areas.

### *1. Communicating between meetings*

These protocols provide mechanisms for board members and the superintendent to contact one another in order to keep each other appropriately informed. Protocols can also clarify if and when the superintendent meets regularly with board members between meetings as well as establish protocols for electronic communication.

### *2. Preparing for meetings*

These protocols clarify the processes board members use to submit items for possible inclusion on the agenda, the structure of the agenda, and the distribution of all agenda materials to board members in advance of board meetings. The protocols may also address the set-up of the board room itself.

### *3. Conducting meetings*

Among the most important of the board procedural agreements are those that specifically prescribe the rules of order for board meetings. McAdams suggests that "effective board meetings are the first prerequisite... Frequent, long, unfocused, or contentious meetings are sure signs of an ineffective, perhaps even dysfunctional,

board."<sup>17</sup> Large governmental bodies often use Roberts Rules of Order, which are complicated and may not be best suited to a five- or seven-member board. One alternative is Rosenberg's Rules of Order—a streamlined approach to parliamentary procedures for smaller, local governing bodies. Some districts use an even simpler approach; they develop their own set of limited and specific rules for making motions, calling for the vote, and other basic procedural needs of board meetings.

### *4. Board members and the public*

These protocols answer a variety of related questions. Who respond to the media? The board president? Or any board member? How do board members respond to questions or concerns from parents or staff? How do board members contribute to making sure issues get resolved without getting involved in administrative decisions?

It is in the area of protocols relating to public statements that board members often encounter disagreement and tension. The purpose of having clear agreements about these issues is to provide clear guidance for board members and staff regarding communications and to ensure that individual board members know what to expect from each other with regard to how all members communicate with the community. The agreements are binding only because members agree to them; they are not legally binding. But breaking agreements damages trust, and so developing clear agreements by which all members can abide is important to the board's cohesiveness.

Failure to establish and abide by values, norms and protocols is a common source of difficulty for boards. Lack of clarity or commitment to these procedures can create confusion as well as anger or distrust among members. This often distracts the board from its real governing work and has a negative effect on board and district culture. Effective boards work hard to maintain clarity and commitment to the board's values, norms and protocols.

## Summary

Effective school boards establish governance commitments in three key areas: 1) They embrace a common set of core beliefs. 2) They are intentional about building and sustaining productive partnerships. 3) They have clear agreements regarding board values, norms and protocols. Reaching clarity around these issues is foundational to working effectively as a governing board. These agreements should be committed to writing, referred to regularly and reviewed periodically. This level of clarity creates the conditions for the smooth and effective functioning of the board, freeing the board to focus all of its energy on the most critical matters facing the district.

## Endnotes

- 1 Gemberling, K., Smith J., & Villani, S. (2000). *The key work of school boards guidebook*. Alexandria, VA: National School Boards Association
- 2 Eadie, D. (2006). *The five habits of high impact school boards*. Lanham, MD: Rowan & Littlefield Education
- 3 Delagardelle, M. (2008). The lighthouse inquiry: Examining the role of school board leadership in the improvement of student achievement. In T. A. Editor, *The future of school board governance: Relevancy and revelation* (pp. 191-223) Lanham, MD: Rowan & Littlefield Education
- 4 California School Boards Association. (2000)
- 5 Delagardelle, M. (2008).
- 6 California School Boards Association. (2000)
- 7 McAdams, D. (2006). *What school boards can do*. New York, NY: Teachers College Press
- 8 Center for Study of Teaching and Policy. (2006). *Redefining school district governance*. Seattle, WA: Plecki, M., McCleery, J., and Knapp, M.
- 9 Mid-continent Research for Education and Learning. (2006). *School leadership that works: Effect of superintendent leadership on student achievement*. Marzano, R., Waters, J.
- 10 Center for Study of Teaching and Policy. (2006).
- 11 Board Source. (2005)
- 12 Jackson, D. & Holland, T. (1998). Measuring the effectiveness of nonprofit boards. *Nonprofit and Voluntary Sector Quarterly*, 27 (2), 159-182
- 13 Institute for a Competitive Workforce. (2012). *School board case studies*. Rotherham, A. & Mead, S.
- 14 Lencioni, P. (2012). *The Advantage*. San Francisco, CA: Jossey-Bass
- 15 Board Source. (2005)
- 16 McAdams, D. (2006).
- 17 Ibid.



April 2014

# Governance Brief

## Defining Governance, Issue 3

*Governance Practices*

This is the third in CSBA's Defining Governance series which summarizes school governance research on the attributes of effective school boards. The first issue developed a definition for school governance. The second issue addressed the importance of developing board commitments in the areas of core beliefs, productive partnerships and board values, norms and protocols. This third issue focuses on practices that contribute to effective governance. These effective practices begin with board commitments and increase the board's capacity to fulfill its responsibilities. Governance research identifies three major areas of effective school board practices, including improving governance, using data, and focusing on the foundations of successful education reform.

### Effective school boards focus on improving governance

Effective boards are intentional about developing their own capacity to govern through practices specifically designed to focus their attention on improving their board skills. These practices include board development and monitoring and evaluating board performance.

#### *Board development*

Board development can improve the board's ability to work together successfully<sup>1</sup> and translate into more effective leadership and governance.<sup>2</sup> However, school board members—and newly elected board members in particular—often receive little or no training for their governance work.<sup>3</sup> Board development includes learning about education trends and practices, but also focuses on learning about governance roles, knowledge and skills.<sup>4</sup> When boards are better educated about the work

**School governance defined:** School boards ensure success for all students by making decisions that fulfill legal mandates and align district systems and resources to ensure the long-term fiscal stability of the district. To do this, boards must act collectively and openly, be guided by community interests and informed by recommendations of the superintendent and professional staff.

of governing, they are more likely to form an effective team.<sup>5</sup> Learning together about board roles has been identified as one of the key practices of boards in districts that effectively advance student achievement.<sup>6</sup> Similar findings are evident in governance research outside education. Exceptional non-profit boards build learning opportunities into their regular governing activities both in and out of the boardroom.<sup>7</sup> These learnings ensure that board members are well informed about the organization and the professionals working there, as well as the board's own roles, responsibilities and performance.<sup>8</sup>

#### *Monitoring and evaluating board performance*

School board researchers conclude that boards in successful districts create mechanisms for accountability within and across the system,<sup>9</sup> including holding themselves accountable.<sup>10</sup> This is the second core aspect of strengthening a board's capacity to govern: to set governance performance targets, monitor performance toward those targets and conduct board evaluations. CSBA's Professional Governance Standards (2000) assert that an effective board periodically evaluates its own effectiveness. Eadie makes the point explicitly.

*"...every truly high-impact board I have ever worked with has played an active, formal role in managing its own performance as a governing body, not only by taking accountability for the board's collective performance but also making sure that individual board members meet well-defined performance targets."<sup>11</sup>*

—Doug Eadie

To sustain their focus on improving governance, boards must create protected time for their developmental work and integrate these practices into the board calendar and meeting agendas.<sup>12</sup> A fundamental aspect of the board's development is the effectiveness of its meetings. Boards can only perform their governance work at board meetings, where they have limited time and often extensive issues that require their attention. So the effectiveness of these meetings is critical to effective governance. According to Donald McAdams, founder of the Center for Reform of School Systems, public board meetings can influence community perception about the district and its leadership. "Crisp, efficient, well-ordered meetings send the signal that the board knows its business and is taking its stewardship of the schools seriously."<sup>13</sup>

## Effective school boards focus on the foundations of successful reform

Research and literature on the effectiveness of school districts and boards reveals three core elements of successful reforms that effective boards embrace as foundational to their change efforts: systems thinking, a culture of continuous learning, and distributed leadership.

### *Systems thinking*

K-12 school districts and county offices are complex organizations with many interacting parts. Changes in any one part of the organization will have consequences, often unintended, in other parts of the institution. Embracing systems thinking means that boards are intentional about learning the dynamics of the systems they govern and recognizing how changes will impact the entire organization.<sup>14</sup> Approaching school governance with a systems thinking mindset includes the understanding that large, complex systems are inherently resistant to change without careful planning and strong implementation.<sup>15</sup> Because the systems are complex, the changes cannot be isolated; "... improvement doesn't mean doing one thing exceedingly well,

it is doing many aligned things well."<sup>16</sup> This alignment is not theoretical, but experiential. Systemic change requires support for the change in every school, with all elements of the system interconnected and involved, day after day.<sup>17</sup>

### *A culture of continuous learning*

Boards maximize the performance of educators by creating a culture of continuous learning at all levels. In the field of K-12 teacher professional development, professional learning communities (PLC) have gained strong momentum and wide acceptance. One of the most important characteristics of PLC's is focusing on collective rather than individual development. The board, working with the superintendent, creates and sustains this ongoing development through goals, policies and resource decisions that create dedicated time and space for collaborative learning. This time is dedicated to collectively studying and addressing classroom challenges in instruction and assessment.<sup>18</sup> In a culture of high trust, it provides educators the freedom and confidence to openly share mistakes and constructively analyze classroom practice.<sup>19</sup> Building this culture of continuous learning requires boards to understand the characteristics of quality professional development and to invest in it through intentional changes in the allocation of people, time, and money.<sup>20</sup>

### *Distributed leadership*

Boards and superintendents provide the top-level leadership that moves an education system towards fulfilling its mission. Recent research has revealed the importance of expanding leadership throughout the system. McAdams argues that capacity, accountability, and empowerment—giving adults as much power as possible to do their work—are the foundation of any successfully theory of change.<sup>21</sup> Delagardelle (2008) identified a balance between districtwide direction and building-level autonomy, extending the relationship between the board and the superintendent to other district leaders, including central office staff, site principals and teacher leaders. Other researchers have described this empowerment as defined autonomy—giving authority and responsibility to principals within clear parameters for outcomes,<sup>22</sup> or as a balance between system-wide consistency and flexibility.<sup>23</sup> This is also described as building instructional and leadership capacity systemically and is predicated on the belief that sustained improvement can only be achieved when all the educators—principals and teachers together—are focused on improving learning.<sup>24</sup>

## Effective school boards use data for their governing work

The use of data by boards is well-established. Research in the non-profit sector reveals that effective boards are well informed about the institution and the professions that serve there.<sup>25</sup> These boards are analytical and embrace a culture of inquiry by seeking information and pushing back on assumptions and conclusions.<sup>26</sup> Effective school boards also use data.

### *Data at the system level*

School systems are complex and boards need a variety of data to have a complete picture of the system. The kinds of data boards need includes district and school level student outcomes data, demographic data, business operational data and perception data. Boards act strategically by not only focusing on the district level data, but through the board's system-wide response to the data.

### *Data guides decision-making and accountability*

The National School Boards Association's framework of eight interrelated board actions that lead to raising student achievement includes continuous improvement: "Good data empowers the board and staff to refine, strengthen, modify, correct, and/or eliminate existing programs and practices to get better results."<sup>27</sup> This is echoed in the Center for Public Education's eight research-supported characteristics of board effectiveness: "Effective boards are data savvy: they embrace and monitor data, even when the information is negative, and use it to drive continuous improvement."<sup>28</sup> The Lighthouse Study identified seven areas of board performance that lead to improvements in student achievement, including using data to set expectations, monitor improvement and apply pressure for accountability.<sup>29</sup> The board, with the superintendent, works to reach agreement on what the data means qualitatively—the story behind the data. Boards also determine which data will be used to share progress towards district goals.<sup>30</sup>

### *Data use guided by policy*

Data collection and analysis is an intensive task, and not all data is worth gathering. The processes for the use of data and data dashboards should be guided by board policy that clarifies its purpose, content, cycle of review, and sample displays as exhibits to accompany the policy.<sup>31</sup> Boards need to work with their superintendent to develop a clear and focused plan for collect-

ing data that is necessary for monitoring district performance, and provide sufficient funding for the data functions that the board requests.<sup>32</sup>

## Summary

The research on effective K-12 school governance surfaces three practices of governance that are correlated with board effectiveness. First, effective school boards commit to improving their capacity to govern. They create protected time for their developmental work and model the culture of continuous learning by concentrating their efforts on learning about governance, setting performance targets, and monitoring and evaluating their performance. Second, effective boards focus on the foundations of successful reform of employing systems-thinking in their governance work, building a culture of continuously learning and extending leadership for learning throughout the system. Finally, boards use data to make decisions and monitor district performance. They study demographic, operational, outcome, and perception data. Boards use this data to reach agreement on the relative strength of the district's systems so that they can set goals to address areas where growth or improvement is desired.

Visit [www.csba.org/effectivegovernance](http://www.csba.org/effectivegovernance) for more governance resources.

## Endnotes

- 1 Institute for a Competitive Workforce. (2012). *School board case studies*. Rotherham, A.
- 2 Adamson, M. (2011). *Effective school board leadership and governance: The impact of training and continuous education on self-perceptions of board competency*. (Unpublished doctoral dissertation). Indiana Wesleyan University, Marion, IN.
- 3 Plough, B. (2011). *School board governance and student achievement: School board members' perceptions of their behaviors and beliefs*. (Unpublished doctoral dissertation). San Diego State University, San Diego, CA.
- 4 Center for the Study of Teaching and Policy. (2006). *Redefining school district governance*. Plecki, A.
- 5 Eadie, D. (2006). *The five habits of high impact school boards*. Lanham, MD: Rowan & Littlefield Education.
- 6 Delagardelle, M. (2008). "The Lighthouse Inquiry: Examining the Role of School Board Leadership in the Improvement of Student Achievement," *The future of school board governance: Relevancy and revelation*. Lanham, MD: Rowan & Littlefield Education.

- 7 BoardSource (2005). *Twelve principles of governance that power exceptional boards*. Washington, D.C.
- 8 Jackson, D. & Holland, T. (1998). Measuring the effectiveness of nonprofit boards. *Nonprofit and Voluntary Sector Quarterly*, vol. 27, (no. 2), pages 159-182.
- 9 Institute for a Competitive Workforce. (2012). (See endnote 1)
- 10 Delagardelle, M. (2008). (See endnote 6)
- 11 Eadie, D. (2006). (See endnote 5)
- 12 Academic Development Institute. (2013). *The role of school boards in school accountability and transformation*. Lincoln, IL: Rhim, L.
- 13 McAdams, D. (2006). *What school boards can do: Reform governance for urban schools*. New York, NY: Teachers College Press.
- 14 National School Boards Association. (2000).
- 15 Van Clay, M. & Soldwedel, P. (2009). *The school board field book*. Bloomington, IN: Solution Tree Press.
- 16 McAdams, D. (2006). (See endnote 13)
- 17 Center for Strategic Education. (2011). *Choosing the wrong drivers for whole system reform*. East Melbourne, VIC: Fullan, M.
- 18 Center on Innovation & Improvement. (2009). *Exploring the pathway to rapid district reform*. Lincoln, IL: Lane, B.
- 19 Marzano, R. (2003). *What works in schools: Translating research into action*. Alexandria, VA: Association for Supervision and Curriculum Development.
- 20 Delagardelle, M. (2008). (See endnote 6)
- 21 McAdams, D. (2006). (See endnote 13)
- 22 Mid-Continent Regional Educational Laboratory. (2006). *School district leadership that works: The effect of superintendent leadership on student achievement*. Denver, CO: Waters, J. & Marzano, R.
- 23 WestEd. (2006). *A review of research on district improvement*. San Francisco, CA.
- 24 Center on Innovation & Improvement. (2009). (See endnote 18)
- 25 Jackson, D. & Holland, T. (1998). (See endnote 8)
- 26 BoardSource. (2005). (See endnote 7)
- 27 National School Boards Association. (2000).
- 28 Center for Public Education. (2011). *Eight characteristics of effective school boards*. Alexandria, VA: Devarics, C.
- 29 Delagardelle, M. (2008). (See endnote 6)
- 30 Van Clay, M. & Soldwedel, P. (2009). (See endnote 15)
- 31 Washington State School Directors' Association. (2008). *Data dashboards for school directors: Using data for accountability and student achievement*. Olympia, WA: Lobdell, G.
- 32 Schools Interoperability Framework Association. (2009). *What school boards need to know: Data conversations*. Washington, DC: Abbott, J.

# Governance Brief

## Defining Governance, Issue 4

### Governance Decisions

This is the fourth brief in the Defining Governance series, which summarizes school governance research on the attributes of effective school boards. Topics of the first three briefs in the series were:

1. Defining school governance
2. The importance of board commitments in the areas of core beliefs, productive partnerships and board values, norms and protocols
3. Effective governance practices: focusing on improving governance, using data, and understanding the elements of successful district reform

This brief focuses on the governing decisions that boards make to improve achievement for all students. These decisions involve:

- Setting direction
- Aligning the system
- Ensuring accountability

**Governance is:** Ensuring success for all students by making informed decisions that align district systems and resources to ensure the long-term stability of the district. To do this, boards, guided by community interests, must act collectively and openly, fulfill legal mandates, and rely on recommendations of professional staff.

## Effective boards set direction

Non-profit sector governance research has established setting direction as a core board responsibility. Boards establish a vision for organizational direction and help to ensure a strategic approach to the organization's future.<sup>1</sup> This important work takes time and requires the board to align board meeting agendas to strategic priorities.<sup>2</sup> These research findings on non-profit boards translate well to the school board context: Setting direction is also an attribute of effective school boards. Specifically, effective school boards:

- Make student learning a high priority
- Prioritize goals to ensure that the most important changes are addressed first
- Clarify expectations for outcomes

## Making student learning a high priority

School districts that are successful in raising student achievement have board members for whom improving student learning is a high priority.<sup>3</sup> Research on districts that successfully raised student achievement shows that board members were knowledgeable about learning conditions in the district, could articulate specific initiatives that the district was implementing, and could clearly describe the work of staff related to the goals.<sup>4</sup> Other research has described the importance of the school board playing an active role in leading innovation and change in order to raise student achievement.<sup>5</sup> A 2012 report based on case studies of 13 large U.S. districts concluded that boards are most effective when their strategic role includes setting high-level goals for improving student achievement.<sup>6</sup> This focus on student learning is founded on what board members believe about students. The ability of the board to have an explicit agenda for student learning:

*...rests, in part, on a fundamental belief that all children can learn. Where policymakers and decision makers at all levels bring this to the table, there is a greater likelihood that the board will act in the best interests of the young people served by the district.<sup>7</sup>*

### *Prioritizing goals*

Setting priorities means deciding which goals matter most. If the top two most important changes require most of the district's resources, then other changes, however desirable, will have to wait. Goals and priorities express the school organization's core beliefs. Effective boards recognize that "mission, vision and values are the bedrock upon which the board conceives and articulates change."<sup>8</sup> Effective boards define clear goals to move the organization toward the vision.<sup>9</sup>

This focus on student learning also means deciding what not to do and limiting administrative initiatives to those identified by the board as key priorities.<sup>10</sup> The board needs to hone its focus in order to prevent goal-creep—the tendency of the district to take on too many changes—and resist allocating precious resources to too many goals, thus underfunding all of them.

### *Clarifying expectations for outcomes*

A critical element of the board's strategic direction work is setting clear expectations for results.<sup>11</sup> The clarity of these expectations is expressed through the data that the board will use to determine if they have been met. Boards use data to define what must change and to measure if and to what extent change has been achieved. In districts identified in research as making significant progress in raising student achievement, board members received a variety of information that allowed the board to identify student needs and to set goals based on the data.<sup>12</sup>

## **Effective boards align the system**

Effective boards focus on systemic alignment to ensure that all aspects of district operations are pursuing the same goals in a coherent manner. This alignment has two fundamental components: resources and policies.

### *Aligning resources*

The importance of the district budget as a direction-setting tool cannot be overstated. Boards fund the changes they seek by allocating resources for all the things that money pays for: buildings, technology, in-

structional materials, services, and most importantly, people. Boards know that the largest percent of a district budget is spent on salaries and benefits, often constituting more than 80% of all district expenses. Therefore, boards need to ensure that the allocation of staff supports the district's operations and aligns with the district's priorities. For example, if establishing district partnerships with other organizations is a priority for the board as a long-term strategic effort, that effort may require the dedicated time of key staff.<sup>13</sup>

A study of three Texas school boards characterized this alignment work as building efficacy—the power to produce a desired effect. Specifically, school leaders committed a very high level of knowledge, skills, resources, and support to change efforts. When responding to the challenge of limited resources, priority was given to using funds in ways that most directly supported instruction.<sup>14</sup> The importance of resource allocation is well stated by Schmoker: "The key is to marry a priority on learning to an obsession with funding and the school calendar."<sup>15</sup>

### *Aligning policies*

The board's strategic direction includes creating and improving district structures through policies that drive district operations and performance. Effective school boards spend less time on operational issues and more time focused on policies to improve student achievement.<sup>16</sup> A majority of district policies are often driven by changes in state law. These are usually brought to the board by the administration as recommendations to ensure the policy language remains consistent with the law. These policies might be considered operational because they ensure stability and consistency in the district's systems for learning, business operations, transportation and facilities, and more. However, boards can also create policies to drive change. These reform policies are proactive; they are designed to make significant changes in the district.<sup>17</sup>

For example, in addition to setting a goal for establishing Professional Learning Communities (PLCs) the board could also develop a district policy that establishes the purpose of PLCs in the district, expectations for teacher participation in PLCs, and how the effectiveness of PLCs will be assessed.<sup>18</sup> By placing the practice of PLCs in policy, the board elevates PLCs to a higher level of strategic direction. In the Lighthouse study, board members in effective districts believed if key district leaders or board members left their positions, providing guidance for district improvement efforts in written policies would sustain the initiatives.<sup>19</sup>

## Ensuring accountability

The accountability expected from governing boards is commonly understood as monitoring organizational performance and reporting results to stakeholders. In the non-profit sector, exceptional boards are results-oriented, measuring the effectiveness, efficiency and quality of programs and services.<sup>20</sup> Fullan has suggested that focusing directly on accountability does not create the incentive and intrinsic motivation that lead to successful reform in K-12 school districts.<sup>21</sup> However, this does not relieve boards of their statutory authority and responsibility for oversight. K-12 school and governance research suggests three aspects of accountability that can increase a school board's effectiveness:

1. Accountability as a framework
2. Accountability as a cycle
3. Accountability as shared responsibility

### *Accountability as a framework*

Effective boards establish district-wide accountability systems to measure the performance of the board, superintendent and the district:

- **Board performance**—Effective boards hold themselves accountable,<sup>22</sup> periodically evaluating their own performance.<sup>23</sup> Examples include regularly reviewing their governance functions, monitoring progress toward board performance goals, and evaluating the effectiveness of board meetings.
- **Superintendent evaluation**—Holding the superintendent accountable for results is a critical practice of effective boards.<sup>24</sup> This process is often considered a board's most important accountability tool. Unfortunately, it sometimes receives insufficient attention because boards either do not recognize its importance, feel uncomfortable evaluating their superintendent, or do not feel competent to conduct the evaluation. Three key elements of an effective process include 1) working with the superintendent to set very clear performance targets, 2) monitoring performance regularly (not just annually), and 3) focusing the process on improving performance as well as improving the board-superintendent relationship.
- **District performance**—This includes monitoring improvements in student achievement and other district goals, as well as the district's operations and fiscal performance. Student achievement data should

include indicators for achievement (where they are now) and improvement (how far they have come).

In each of these areas, the school board has the ultimate authority and responsibility for establishing and monitoring key indicators of success.<sup>25</sup> Specifically, effective boards use quantitative and qualitative data to: 1) set expectations, 2) monitor improvement, and 3) apply pressure for accountability.<sup>26</sup> Without clear expectations, professional staff has no way of knowing which information will be considered most important by the board.<sup>27</sup>

### *Accountability as a cycle*

Effective boards use the accountability framework, not only to provide district oversight, but also to organize their governing work. Accountability is not an annual event; it is an ongoing cycle of reporting and review. Boards work with superintendents to determine how frequently data should be provided, and these reports are embedded into the board's regular meetings so that some accountability measures are reported on a regular basis, if not at every meeting.<sup>28</sup> To ensure board and community understanding, these reports should be in a consistent format that is easy to understand.<sup>29</sup>

### *Accountability as shared responsibility*

According to a 2011 study,<sup>30</sup> community members have different views and definitions of accountability. Organizational leaders generally see accountability as primarily focused on using quantitative measures to improve performance and find technical solutions to problems. They believe that transparency is the basis of building community trust in the organization. In contrast, members of the public describe accountability as individuals at all levels behaving responsibly, ensuring fairness, acting honorably, listening to the public, and responding to public concerns with courtesy and respect. They also described it as shared responsibility: they do not believe that educational leaders bear the accountability burden alone. "They see it as a shared duty, and many seemed as frustrated by the irresponsibility of neighbors and fellow citizens as they were by irresponsibility among the powers that be."

A follow-up study in 2013<sup>31</sup> concluded that the public believes that most schools should do better and that some recent accountability reforms, including raising standards and education requirements, are good reforms. The study also reported some parent perspectives on school accountability that boards should consider:

- **The critical role of parent accountability**—Parents believe that their primary responsibility is to instill the “values and habits of behavior that will help their children lead responsible and successful lives.”
- **The impact of the larger culture**—Parents say that schools cannot be successful without greater social support.
- **The over-emphasis on testing**—Parents indicated that testing needs “to be put in context with other important elements of teaching and learning.”
- **The vital role of schools in communities**—Parents strongly reject the strategy of closing schools as ways to improve accountability.
- **The benefit of choice**—Parents were not united in weighing the sometimes conflicting goals of giving parents more choices or having good neighborhood schools everywhere.
- **Good communication is the goal, not more data**—Parents want two-way communication. More information may be valuable, but it does not ensure that communication is taking place.

These findings about accountability suggest that as boards develop district accountability frameworks, it is important to engage parents and community members in determining how the district will demonstrate good accountability and what that means.

## Summary

Effective boards set direction by making student achievement a high priority, prioritizing all district improvement efforts and clarifying the board’s expectations for performance. They align all district resources and policies to ensure that the improvement efforts are supported. Effective boards also establish a comprehensive framework for accountability that includes board, superintendent and district performance and they review accountability results as a regular activity at board meetings. Finally, effective boards ensure that the district accountability system involves and is responsive to the needs and interests of parents and community members.

## Endnotes

- 1 Jackson, D. & Holland, T. (1998). Measuring the effectiveness of nonprofit boards, *Nonprofit and Voluntary Sector Quarterly*, vol. 27, no. 2 pages 159-182.
- 2 BoardSource (2005). Twelve principles of governance that power exceptional boards. Washington, D.C.
- 3 Thomas Fordham Foundation. (2014). Does school board leadership matter? Washington D.C: Shober, A. & Hartney, M.
- 4 Iowa School Boards Association. (2000). The lighthouse inquiry: School board / superintendent team behaviors in school district with extreme differences in student achievement. Delagardelle, M.
- 5 Eadie, D. (2005). *The Five Habits of High Impact School Boards*. Lanham, MD: Rowan & Littlefield Education
- 6 Institute for a Competitive Workforce. (2012). School board case studies. Rotherman, A. and Mead, S.
- 7 Center for the Study of Teaching and Policy. (2006). Redefining school district governance. Plecki, A.
- 8 Van Clay, M. & Soldwedel, P. (2009). *The school board field book*. Bloomington, IN: Solution Tree Press
- 9 Center for Public Education. (2011). Eight characteristics of effective school boards.
- 10 Van Clay, M. & Soldwedel, P. (2009). (See endnote 8)
- 11 Delagardelle, M. (2008). “The Lighthouse Inquiry: Examining the Role of School Board Leadership in the Improvement of Student Achievement,” *The future of school board governance: Relevancy and revelation*. Rowan & Littlefield Education
- 12 Iowa School Boards Association. (2000). (See endnote 4)
- 13 Sanders, M. (2006). *Building school-community partnerships: Collaboration for school success*. Thousand Oaks, CA: Corwin Press.
- 14 The Charles A. Dana Center. (1999). *Urgency, Responsibility, Efficacy: Preliminary findings of a study of high-performing Texas school districts*. Austin, TX: Ragland, M., Asera, R. and Johnson, J.
- 15 Schmoker, M. (1999). *Results: The key to continuous school improvement*. Alexandria, VA: Association for Supervisions and Curriculum Development
- 16 Center for Public Education. (2011). (See endnote 9)
- 17 McAdams, D. (2006) *What Boards Can Do*. Columbia, NY: Teachers College Press
- 18 For a sample, see Fresno Unified School District’s Board Policy 0300 Board – Professional Learning at <http://www.fresno.k12.ca.us/boardpolicies/fusd/displaypolicy/503382/0.htm>
- 19 Delagardelle, M. (2008). (See endnote 11)
- 20 BoardSource (2005). (See endnote 2)

- 21 Center for Strategic Education. (2011). Choosing the wrong drivers for whole system reform. East Melbourne, VIC: Fullan, M.
- 22 Delagardelle, M. (2008). (See endnote 11)
- 23 California School Boards Association. (2000). Professional governance standards for school board members.
- 24 Institute for a Competitive Workforce. (2012). (See endnote 6)
- 25 Van Clay, M. & Soldwedel, P. (2009). (See endnote 8)
- 26 Delagardelle, M. (2008). (See endnote 11)
- 27 Reeves, D. (2000). Accountability in Action: A blueprint for learning organizations. Denver, CO: Advanced Learning Press
- 28 Reeves, D. (2000). (See endnote 27)
- 29 Gemberling, K. Smith, J. & Villani, S. (2000). The key work of school boards guidebook. Alexandria, VA: National School Boards Association
- 30 Kettering Foundation. (2011). Don't count us out: How an over-reliance on accountability could undermine the public's confidence in schools, business, government, and more. Dayton, OH: Johnson, J., Rochkind, J, & DuPont, S.
- 31 Kettering Foundation. (2013). Will it be on the test? How leaders and parents think about accountability in public schools. Dayton, OH: Johnson, J.



July 2014

# Governance Brief

## Defining Governance, Issue 5

*Engaging the Community*

This is the fifth and final brief in the Defining Governance series, which summarizes key research on the characteristics and practices of effective school boards. Topics of the first four briefs were: 1) defining school governance; 2) establishing governance agreements; 3) engaging in effective governance practices; and 4) taking action to set direction, align the organization and ensure accountability. This brief focuses on the board's responsibility for community engagement. Governance research identifies the relationship between the board and the institution's stakeholders as a primary governance responsibility<sup>1</sup> and that community involvement is one of seven conditions identified by researchers as necessary for school renewal that leads to raising student achievement.<sup>2</sup> This brief will explore what research says about effective community engagement.

**Governance is:** School boards ensure success for all students by making decisions that fulfill legal mandates and align district systems and resources to ensure the long-term fiscal stability of the district. To do this, boards must act collectively and openly, be guided by community interests and informed by recommendations of the superintendent and professional staff.

### Evolving context of community representation and engagement

Over time, the community engagement role of boards has been dramatically impacted by a consolidation in the number of districts, the increasing size of districts, changes in district demographics, and changes in technology. After 1900, local communities became

more diverse, schools became more complex, and direct participatory democracy became increasingly challenging.<sup>3</sup> Between 1948 and 1961, school districts grew fewer in number and larger in size, reducing the total number of districts nationally by more than 50,000. On any given day the 1970s, "three districts disappeared forever between breakfast and dinner." As a result, the relative number of constituents represented by board members increased significantly. In the 1930s, school board members represented an average of about 200 people. By 1970, that number had jumped to an average of 3,000.<sup>4</sup> Local communities are becoming increasingly diverse. For example, 1.4 million English language learners made up 23% of California's K-12 student population in 2010-11.<sup>5</sup> Finally, the rapidly growing access to information and digital devices is impacting concepts and practices of community engagement.

Year	Number of Districts
1948	89,000
1953	55,000
1961	31,000
2007	14,000

### Community perceptions of engagement

Recent research on community engagement and participatory democracy offer valuable insights regarding how community members value and perceive engagement efforts. A 2009 report suggests that at least two critical elements of increasing engagement include maximizing the relevant and credible information community members need and increasing their capacity to engage with information.<sup>6</sup> However, data alone does not always address people's concerns, particularly if community

members come to the table of engagement with a history of skepticism or distrust. In addition, while many agree that public engagement is essential to school improvement, there is often not a shared understanding of what that engagement should look like.<sup>7</sup> Community engagement has to be a two-way conversation based upon a shared understanding of what the problems are. When conversations are framed thoughtfully, community participants assert that K-12 education is important to them. They believe they have insights worth sharing and that schools do not bear the responsibility for educating children alone.

## Effective boards create clear community engagement processes

Effective boards clarify their expectations for community engagement through policy.<sup>8</sup> Information is essential to informing these conversations and district and board leadership is essential to ensuring that these discussions are respectful and productive.<sup>9</sup> Researchers identify some common mistakes that districts and boards make in stakeholder engagement. One is for leaders to assume that good works speak for themselves and as a result, to under-invest in community relations. Another is to communicate only in times of need or crisis. Finally, approaches to stakeholder engagement are often limited and superficial.<sup>10</sup>

In contrast, research by the Public Education Network,<sup>11</sup> a national organization working to improve public schools and build citizen support for quality public education, identifies the characteristics of effective engagement between districts, boards, and community members. Such effective engagement is:

1. **Strategic:** focusing on student achievement with enough specificity to give participants confidence that the engagement will lead to real change.
2. **Systemic:** ensuring participants understand the inter-connectedness and complexity of the school system.
3. **Structured:** establishing processes that capture participants' insights regarding outcomes and courses of action, which can create momentum and lead to accountability.
4. **Cyclical:** these engagement efforts should be ongoing. An iterative process can provide continuous support and pressure for implementing change.

Research conducted by Public Agenda, a nonprofit, nonpartisan organization dedicated to strengthening democracy, identifies two key strategies that support such effective stakeholder engagement.<sup>12</sup>

1. Provide consistent opportunities for meaningful dialogue.

This may include learning about community perceptions of previous attempts at communication and reform. Information provided by the district in these conversations should be easy to access and understand. Districts should clarify who is responsible for receiving and responding to stakeholder inquiries and ensure that outreach efforts include a wide range of constituents and a variety of approaches.

2. Invest more in existing resources.

- a. Invest in teachers. Teachers are often underutilized for community outreach and communication. Teachers may serve as the first point of contact for parents, students and community members. They are often in the best position to build strong, individual relationships with stakeholders, and to become a trusted source of information. For example, teachers of students who are not proficient in English often have the language skills to communicate with non-English speaking community members.
- b. Work with community-based organizations. These organizations often have deep experience working with communities. If boards and districts can identify shared interests with local community outreach organizations, the district may be able to increase its capacity for effective engagement through partnerships.
- c. Re-invigorate existing local school councils. In surveys, district staff and community organizers agree that these councils are an under-used resource.

## Effective boards use engagement processes to support school improvement

In effective districts, these processes for community engagement established by the board are the means through which boards: 1) create a sense of urgency for district improvement; 2) encourage participation; 3) develop partnerships; and 4) build civic capacity.

### Effective boards create a sense of urgency

CSBA's Professional Governance Standards<sup>13</sup> assert that effective boards "provide community leadership on educational issues and advocate on behalf of students and public education at the local, state and federal levels." In districts that successfully raise student achievement, boards take responsibility for informing the local community about the status of student achievement, identifying problems, and offering a compelling case for the urgent need for change. This role of sharing data that identifies problems and creates a sense of urgency about the need for change can be a difficult shift for board members, who are accustomed to building confidence in the school system by articulating its strengths and accomplishments.<sup>14</sup>

Research indicates that while data might highlight critical need, the sharing of data alone may not garner support for change.<sup>15</sup> Gaining support for district change requires building trust with parents and community leaders, anchored in a shared concern for the children in their community.<sup>16</sup> Beyond establishing the need for change, effective districts build consensus with stakeholders that the change will be a top priority for the district and will focus on improving student achievement.<sup>17</sup>

### Effective boards involve community in vision and planning

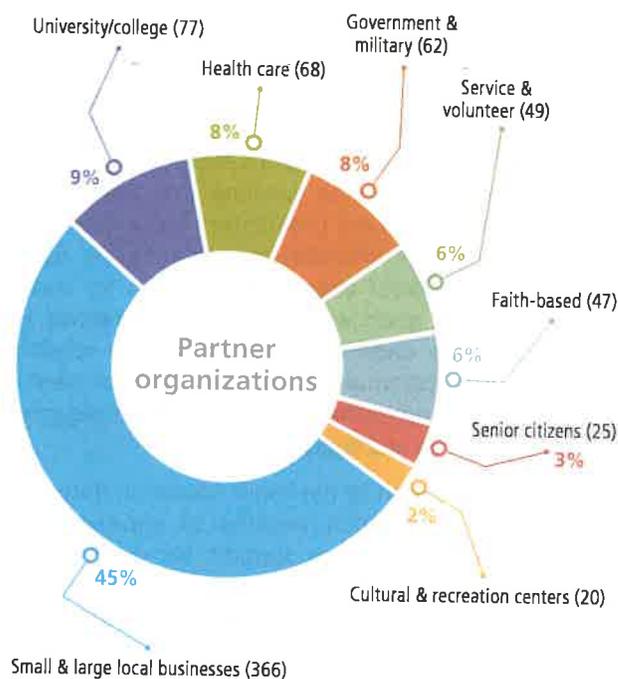
Effective boards create opportunities to hear the views of a diverse range of community members. These opportunities, provided during regular board meetings as well as in other public venues, solicit stakeholder input for the district's vision<sup>18</sup> and long-range planning processes.<sup>19</sup> Ensuring that these processes include all community voices—particularly from community members who may not have been previously included such as non-English speaking groups—can be challenging and may require complex processes.<sup>20</sup> These major efforts to gain community support are considered necessary for implementing district improvement. In studies of districts that have made significant progress in raising student achievement, researchers found that boards not only involved community, they "believed in them as part of the larger team."<sup>21</sup>

### Effective boards build community partnerships

Establishing partnerships is identified as a key activity of effective boards.<sup>22</sup> Boards use district policies to define roles and responsibilities for community partnerships,

establish expectations for the participation of district leadership in partnership efforts, and allocate resources to support these efforts. Surveys reveal that schools often 1) construe partnerships too narrowly, focusing on a limited range of student-centered efforts, and 2) focus on for-profit local and national businesses as potential partners (Chart 1). These results indicate that schools have room to broaden their efforts to include family-, school- and community-centered partnerships and to widen their circle of potential partners.<sup>23</sup>

Chart 1



### Effective boards build support and civic capacity

Building community support for the beliefs, commitments, and reform policies that the board has established to raise student achievement can help districts avoid the abandonment of reform efforts that can follow transitions in board and district leadership.<sup>24</sup> A 2012 study supports this view: "the best outcomes occur when both district leadership and voters understand that successful reform requires a long-term commitment." When the board, superintendent, and district as a whole reach an understanding with the community about why reforms are needed, the progress being made toward reform goals, and the importance of sustaining reform efforts—community members are more likely to identify potential candidates who can sustain

the reforms.<sup>25</sup> A report by the Academic Development Institute recommends that districts create “recruitment pipelines” that introduce stakeholders to board member responsibilities and the role and work of the board.<sup>26</sup> Effective and shared board self-evaluation processes contribute to these efforts. When boards evaluate their performance and share the results, “it tends to attract the attention of qualified board candidates.”<sup>27</sup>

## Summary

Effective school boards build and maintain strong relationships in their local communities by clarifying the purpose of community engagement, and ensuring that engagement processes are strategic, systemic, and structured. Through the engagement process, effective boards build a sense of urgency for reform, and involve stakeholders in establishing a vision and long-term plan. Effective boards also create structures and processes for establishing and maintaining partnerships, and build the capacity of the community to support district reform through transitions in leadership as well as to attract future leaders to the work of school governance.

## Endnotes

- 1 Jackson, D. & Holland, T. (1998). *Measuring the effectiveness of nonprofit boards*, *Nonprofit and Voluntary Sector Quarterly*, 27, 159-182.
- 2 Iowa Association of School Boards. (2001). *The lighthouse inquiry: school board / superintendent team behaviors in school districts with extreme differences in student achievement*. Des Moines, IA: Delagardelle, M.
- 3 Kowalksi, T., (2008). School reform, civic engagement, and school board leadership. In T.A. Editor, *The future of school board governance: Relevancy and revelation* (pp. 225-243). Lanham, MD: Rowan & Littlefield Education.
- 4 Kirst, M. (2008). The evolving role of school boards. In T.A. Editor, *The future of school board governance: Relevancy and revelation*. (pp. 37-59). Rowan & Littlefield Education
- 5 California Department of Education <http://www.cde.ca.gov/re/pn/fb/index.asp> accessed on June 9, 2014.
- 6 Knight Commission on the Information Needs of Communities in a Democracy. *Informing communities: Sustaining democracy in the digital age*. Washington, D.C.: The Aspen Institute, October 2009.
- 7 Public Agenda. (2012). *Community responses to school reform in Chicago: Opportunities for local stakeholder engagement*. New York, NY.
- 8 Kowalksi (2008). (See endnote 2)
- 9 Public Agenda. (2014). *Joint ventures: An experiment in community / professional co-framing in K-12 education*. San Francisco, CA.
- 10 Eadie, D. (2005). *The five habits of high impact school boards*. Lanham, MD: Rowan & Littlefield Education.
- 11 Public Education Network. (2004). *Taking responsibility: Using public engagement to reform our public schools*. Washington, D.C.: Miles, W. and Banks, D.
- 12 Public Agenda. (2012). (See endnote 7)
- 13 California School Boards Association. (2000).
- 14 Delagardelle, M. (2008). The lighthouse inquiry: Examining the role of school board leadership in the improvement of student achievement. In T.A. Editor, *The future of school board governance: Relevancy and revelation* (pp. 191-223). Lanham, MD: Rowan & Littlefield Education.
- 15 Center on Innovation & Improvement. (2009). *Exploring the pathway to rapid district reform*. Lane, B.
- 16 The Charles A. Dana Center. (1999). *Urgency, responsibility, efficacy: Preliminary findings of a study of high-performing Texas school districts*. Austin, TX: Ragland, M., Asera, R. and Johnson, J.
- 17 WestEd. (2006). *A review of research on district improvement*. San Francisco, CA.
- 18 CSBA (2000).
- 19 Van Clay, M. & Soldwedel, P. (2009). *The school board field book*. Bloomington, IN: Solution Tree Press
- 20 Center for Study of Teaching and Policy. (2006). *Redefining school district governance*. Seattle, WA: Plecki, M., McCleery, J., and Knapp, M.
- 21 Iowa Association of School Boards. (2001). (See endnote 3).
- 22 Gemberling, K, Smith, J. & Villani, S. (2000). *The key work of school boards guidebook*. Alexandria, VA: National School Boards Association
- 23 Sanders, M. (2006). *Building school-community partnerships: Collaboration for school success*. Thousand Oaks, CA: Corwin Press.
- 24 McAdams, D. (2006). *What school boards can do: Reform governance for urban schools*. Columbia, NY: Teachers College Press
- 25 Institute for a Competitive Workforce. (2012). *School board case studies*. Rotherman, A. and Mead, S.
- 26 Academic Development Institute. (2013). *The role of school boards in school accountability and transformation*. Lincoln, IL: Rhim, L.
- 27 Eadie, D. (2005). (See endnote 8)



## ROBERTS RULES CHEAT SHEET

To:	You say:	Interrupt Speaker	Second Needed	Debatable	Amendable	Vote Needed
Adjourn	"I move that we adjourn"	No	Yes	No	No	Majority
Recess	"I move that we recess until..."	No	Yes	No	Yes	Majority
Complain about noise, room temp., etc.	"Point of privilege"	Yes	No	No	No	Chair Decides
Suspend further consideration of something	"I move that we table it"	No	Yes	No	No	Majority
End debate	"I move the previous question"	No	Yes	No	No	2/3
Postpone consideration of something	"I move we postpone this matter until..."	No	Yes	Yes	Yes	Majority
Amend a motion	"I move that this motion be amended by..."	No	Yes	Yes	Yes	Majority
Introduce business (a primary motion)	"I move that..."	No	Yes	Yes	Yes	Majority

The above listed motions and points are listed in established order of precedence. When any one of them is pending, you may not introduce another that is listed below, but you may introduce another that is listed above it.

To:	You say:	Interrupt Speaker	Second Needed	Debatable	Amendable	Vote Needed
Object to procedure or personal affront	"Point of order"	Yes	No	No	No	Chair decides
Request information	"Point of information"	Yes	No	No	No	None
Ask for vote by actual count to verify voice vote	"I call for a division of the house"	Must be done before new motion	No	No	No	None unless someone objects
Object to considering some undiplomatic or improper matter	"I object to consideration of this question"	Yes	No	No	No	2/3
Take up matter previously tabled	"I move we take from the table..."	Yes	Yes	No	No	Majority
Reconsider something already disposed of	"I move we now (or later) reconsider our action relative to..."	Yes	Yes	Only if original motion was debatable	No	Majority
Consider something out of its scheduled order	"I move we suspend the rules and consider..."	No	Yes	No	No	2/3
Vote on a ruling by the Chair	"I appeal the Chair's decision"	Yes	Yes	Yes	No	Majority

The motions, points and proposals listed above have no established order of preference; any of them may be introduced at any time except when meeting is considering one of the top three matters listed from the first chart (Motion to Adjourn, Recess or Point of Privilege).

## PROCEDURE FOR HANDLING A MAIN MOTION

**NOTE:** Nothing goes to discussion without a motion being on the floor.

### Obtaining and assigning the floor

A member raises hand when no one else has the floor

- The chair recognizes the member by name

### How the Motion is Brought Before the Assembly

- The member makes the motion: *I move that (or "to") ...* and resumes his seat.
- Another member seconds the motion: *I second the motion* or *I second it* or *second*.
- The chair states the motion: *It is moved and seconded that ... Are you ready for the question?*

### Consideration of the Motion

1. Members can debate the motion.
2. Before speaking in debate, members obtain the floor.
3. The maker of the motion has first right to the floor if he claims it properly
4. Debate must be confined to the merits of the motion.
5. Debate can be closed only by order of the assembly (2/3 vote) or by the chair if no one seeks the floor for further debate.

### The chair puts the motion to a vote

1. The chair asks: *Are you ready for the question?* If no one rises to claim the floor, the chair proceeds to take the vote.
2. The chair says: *The question is on the adoption of the motion that ... As many as are in favor, say 'Aye'. (Pause for response.) Those opposed, say 'Nay'. (Pause for response.) Those abstained please say 'Aye'.*

### The chair announces the result of the vote.

1. *The ayes have it, the motion carries, and ...* (indicating the effect of the vote) or
2. *The nays have it and the motion fails*

### WHEN DEBATING YOUR MOTIONS

1. Listen to the other side
2. Focus on issues, not personalities
3. Avoid questioning motives
4. Be polite

# HOW TO ACCOMPLISH WHAT YOU WANT TO DO IN MEETINGS

## MAIN MOTION

You want to propose a new idea or action for the group.

- After recognition, make a main motion.
- Member: "Madame Chairman, I move that \_\_\_\_\_."

## AMENDING A MOTION

You want to change some of the wording that is being discussed.

- After recognition, "Madame Chairman, I move that the motion be amended by adding the following words \_\_\_\_\_."
- After recognition, "Madame Chairman, I move that the motion be amended by striking out the following words \_\_\_\_\_."
- After recognition, "Madame Chairman, I move that the motion be amended by striking out the following words, \_\_\_\_\_, and adding in their place the following words \_\_\_\_\_."

## REFER TO A COMMITTEE

You feel that an idea or proposal being discussed needs more study and investigation.

- After recognition, "Madame Chairman, I move that the question be referred to a committee made up of members Smith, Jones and Brown."

## POSTPONE DEFINITELY

You want the membership to have more time to consider the question under discussion and you want to postpone it to a definite time or day, and have it come up for further consideration.

- After recognition, "Madame Chairman, I move to postpone the question until \_\_\_\_\_."

## PREVIOUS QUESTION

You think discussion has gone on for too long and you want to stop discussion and vote.

- After recognition, "Madam President, I move the previous question."

## LIMIT DEBATE

You think discussion is getting long, but you want to give a reasonable length of time for consideration of the question.

- After recognition, "Madam President, I move to limit discussion to two minutes per speaker."

## **POSTPONE INDEFINITELY**

You want to kill a motion that is being discussed.

- After recognition, "Madam Moderator, I move to postpone the question indefinitely."

## **POSTPONE INDEFINITELY**

You are against a motion just proposed and want to learn who is for and who is against the motion.

- After recognition, "Madame President, I move to postpone the motion indefinitely."

## **RECESS**

You want to take a break for a while.

- After recognition, "Madame Moderator, I move to recess for ten minutes."

## **ADJOURNMENT**

You want the meeting to end.

- After recognition, "Madame Chairman, I move to adjourn."

## **PERMISSION TO WITHDRAW A MOTION**

You have made a motion and after discussion, are sorry you made it.

- After recognition, "Madam President, I ask permission to withdraw my motion."

## **CALL FOR ORDERS OF THE DAY**

At the beginning of the meeting, the agenda was adopted. The chairman is not following the order of the approved agenda.

- Without recognition, "Call for orders of the day."

## **SUSPENDING THE RULES**

The agenda has been approved and as the meeting progressed, it became obvious that an item you are interested in will not come up before adjournment.

- After recognition, "Madam Chairman, I move to suspend the rules and move item 5 to position 2."

## **POINT OF PERSONAL PRIVILEGE**

The noise outside the meeting has become so great that you are having trouble hearing.

- Without recognition, "Point of personal privilege."
- Chairman: "State your point."
- Member: "There is too much noise, I can't hear."

## COMMITTEE OF THE WHOLE

You are going to propose a question that is likely to be controversial and you feel that some of the members will try to kill it by various maneuvers. Also you want to keep out visitors and the press.

- After recognition, "Madame Chairman, I move that we go into a committee of the whole."

## POINT OF ORDER

It is obvious that the meeting is not following proper rules.

- Without recognition, "I rise to a point of order," or "Point of order."

## POINT OF INFORMATION

You are wondering about some of the facts under discussion, such as the balance in the treasury when expenditures are being discussed.

- Without recognition, "Point of information."

## POINT OF PARLIAMENTARY INQUIRY

You are confused about some of the parliamentary rules.

- Without recognition, "Point of parliamentary inquiry."

## APPEAL FROM THE DECISION OF THE CHAIR

Without recognition, "I appeal from the decision of the chair."

## Rule Classification and Requirements

Class of Rule	Requirements to Adopt	Requirements to Suspend
Charter	Adopted by majority vote or as proved by law or governing authority	Cannot be suspended
Bylaws	Adopted by membership	Cannot be suspended
Special Rules of Order	Previous notice & 2/3 vote, or a majority of entire membership	2/3 Vote
Standing Rules	Majority vote	Can be suspended for session by majority vote during a meeting
Modified Roberts Rules of Order	Adopted in bylaws	2/3 vote

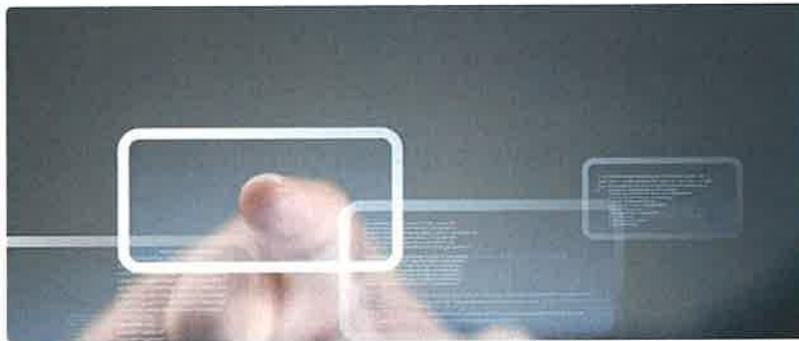
(index.php)

## New Law Finally Attempts to Address Social Media Use and the Brown Act

📅 October 15th, 2020

📁 [Litigation \(/litigation.php\)](/litigation.php), [Municipal \(/localgovernment.php\)](/localgovernment.php), [Community Colleges \(/communitycolleges.php\)](/communitycolleges.php), [Technology & Innovation \(/technologyandinnovation.php\)](/technologyandinnovation.php), [Governance \(/governance.php\)](/governance.php)

🖨️ [Print View \(/news/cnb/CNB732020.pdf\)](/news/cnb/CNB732020.pdf)



October 15, 2020

Number 73

May a member of an elected board, council, or other body subject to the Brown Act comment on, "retweet" or "like" a social media post from another member without risking a Brown Act violation? A new law signed by Governor Newsom, Assembly Bill (AB) 992, effective January 1, 2021, aims to clarify what types of social media interactions are permissible under the Brown Act, and which are not.

When the Brown Act was enacted in 1953, social media as we know it did not exist. Only about half of U.S. households even had a television set in their home. With the rise of the internet and social media, it became possible to have rapid communications and social interactions in a way that the drafters of the

Brown Act could not have envisioned. Along with the new possibilities for social interaction came new pitfalls, as comments or even "likes" on a social media post by a quorum of a governing body can inadvertently become a "meeting" under the Brown Act. Until now the law has not attempted to address what types of social media interactions among locally elected officials are permissible.

AB 992 amends the Brown Act to provide that a member of a local agency legislative body may engage in conversations or communications on an internet-based social media platform, limited to the following purposes:

- (1) Answering questions or providing information to the public; or
- (2) Soliciting information from the public regarding a matter that is within the subject matter jurisdiction of the legislative body.

However, AB 992 prohibits:

- (1) A majority of the members of a legislative body using a social media platform to discuss agency business of a specific nature among themselves; and
- (2) Any member of a local agency legislative body responding directly to any communication from another member on an internet-based social media platform regarding a matter within their subject-matter jurisdiction.

The final version of the bill rejected language in the original draft of the bill that would have allowed additional social media interactions between members of a legislative body.

The bill defines "discuss among themselves" to include communications "made, posted, or shared" on an internet-based social media platform, and includes

comments or digital icons that express reactions to the communications made by other members of the legislative body. In other words, commenting on another member's post, re-tweeting or forwarding, posting an "emoji," or even clicking the "like" button could constitute a "discussion" among members of the legislative body.

AB 992 does not, however, prohibit a member of a legislative body from commenting on, forwarding or "liking" a post made by a member of the public, as long as those comments do not become a discussion of agency business "of a specific nature" among a majority of the members of the legislative body. While the bill does not define the term "of a specific nature," that term is used elsewhere in the Brown Act to distinguish such prohibited discussions from permissible discussions of issues of general interest to the public or to public agencies of a similar type. Thus, for example, it appears that if a member of the public posts information that is of interest to the agency, one or more individual members of the legislative body could re-post that message in order to make the information more available to the public. However, because there is such a wide variety of types of interactions on social media, there are a host of specific situations that the legislation did not address, and where there are ambiguities that will likely lead to further debate over what exactly the new law permits or prohibits.

The Legislative staff report explaining the need for AB 992 quotes extensively from a paper presented to the 2016 Annual Conference of the League of California Cities that was co-authored by the then-Sacramento City Attorney James Sanchez, who is now a Senior Counsel in the Fresno office of Lozano Smith. This paper noted that while internet-based social media can "unleash tremendous communication potential

for communities," it also has several "pitfalls" for local elected officials who are subject to the Brown Act. The paper noted that the state of the law at the time was uncertain as to how the Brown Act's constraints applied to such social media interactions. AB 992 was subsequently introduced to address these issues and provide more clarity regarding the application of the Brown Act to social media communications.

In a similar vein, a recently-issued opinion of the California Attorney General (Opinion No. 18-901; Sept. 22, 2020) addressed a question regarding whether it would violate the Bagley-Keene Open Meeting Act (which applies to state agencies) if a member of the Fair Political Practices Commission responded to an email message from a member of the public to all five commissioners by responding only to the sender of the message and other members of the public, but not to the other commissioners. The Attorney General concluded that under that factual scenario there would be no prohibited "serial meeting" as long as this correspondence was not part of a concerted plan by a majority of the commissioners to engage in a discussion of agency business through a series of communications.

### **Takeaways**

Under AB 992, a member of a local agency legislative body may communicate with the public on a matter of agency business through social media, either by responding to a question or by soliciting information, without violating the Brown Act. This is true even though other members of the legislative body may see those posts. However, any social media interaction between members of the legislative body, including posting comments or "emojis," re-tweeting or even "liking" a communication from another member may constitute a Brown Act violation.

Additionally, members of the legislative body should not use their individual social media postings as a concerted effort to engage one another. Despite the Legislature's effort to clarify these issues, questions will continue to arise as to the boundaries of AB 992. Careful thought should be taken whenever engaging in any social media interactions where the agency's business is involved, and the agency's legal counsel should be consulted if there is any doubt about whether a social media interaction might run afoul of the Brown Act.

If you have any questions about AB 992, or the Brown Act in general, please contact an attorney at one of our [eight offices](#) (<http://www.lozanosmith.com/contact.php>) located statewide. You can also subscribe to our [podcast](#) (<http://www.lozanosmith.com/podcast>), follow us on [Facebook](http://www.facebook.com/LozanoSmith) (<http://www.facebook.com/LozanoSmith>), [Twitter](https://twitter.com/lozanosmith) (<https://twitter.com/lozanosmith>) and [LinkedIn](https://www.linkedin.com/company/lozano-smith/) (<https://www.linkedin.com/company/lozano-smith/>) or download our [mobile app](#) (<http://itunes.apple.com/us/app/lozano-smith-client-news-briefs/id496207221?mt=8>).



Share this Post:



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

## WRITTEN BY



**Harold Freiman** ([./attorney\\_bio.php?id=7](/attorney_bio.php?id=7))  
*Partner*

([./attorney\\_bio.php?id=7](/attorney_bio.php?id=7))



**David Wolfe** ([./attorney\\_bio.php?id=45](/attorney_bio.php?id=45))  
*Partner*

([./attorney\\_bio.php?id=45](/attorney_bio.php?id=45))

## MOST POPULAR BRIEFS



**New California Law Provides COVID-19 Supplemental Paid Sick Leave for Food Service Workers, Health Care Providers and Emergency Responders** ([./news-clientnewsbriefdetail.php?news\\_id=3051](/news-clientnewsbriefdetail.php?news_id=3051))

([./news-clientnewsbriefdetail.php?news\\_id=3051](/news-clientnewsbriefdetail.php?news_id=3051))



**51 New CFRA Bill Expands Job-Protected Leave** ([./news-clientnewsbriefdetail.php?news\\_id=3052](/news-clientnewsbriefdetail.php?news_id=3052))

([./news-clientnewsbriefdetail.php?news\\_id=3052](/news-clientnewsbriefdetail.php?news_id=3052))



**52 New Regulations Regarding Uniform Complaint Procedures Took Effect July 1, 2020** ([./news-clientnewsbriefdetail.php?news\\_id=3057](/news-clientnewsbriefdetail.php?news_id=3057))

([./news-clientnewsbriefdetail.php?news\\_id=3057](/news-clientnewsbriefdetail.php?news_id=3057))



**53 Governor Signs Two Bills Affecting High School Students, Vetoes a Third** ([./news-clientnewsbriefdetail.php?news\\_id=3058](/news-clientnewsbriefdetail.php?news_id=3058))

([./news-clientnewsbriefdetail.php?news\\_id=3058](/news-clientnewsbriefdetail.php?news_id=3058))



**Bylaw 9000: Role Of The Board**

**Status:** ADOPTED

**Original Adopted Date:** 01/24/2012

The Governing Board is elected by the community to provide leadership and citizen oversight of the district's schools. The Board shall work with the Superintendent to fulfill its major roles, which include:

1. Setting a direction for the district
2. Providing a basic organizational structure for the district by establishing policies
3. Ensuring accountability
4. Providing community leadership on behalf of the district and public education

(cf. 9005 - Governance Standards)

(cf. 9200 - Members)

(cf. 9400 - Board Self-Evaluation)

To fulfill these basic responsibilities, the Board shall:

1. Involve the community, parents/guardians, students, and staff in developing a common vision for the district focused on learning and achievement and responsive to the needs of all students

(cf. 0000 - Vision)

(cf. 0100 - Philosophy)

(cf. 0200 - Goals for the School District)

2. Adopt, evaluate, and update policies consistent with the law and the district's vision and goals

(cf. 9311 - Board Policies)

(cf. 9312 - Board Bylaws)

3. Maintain accountability for student learning by adopting the district curriculum and monitoring student progress

(cf. 0500 - Accountability)

(cf. 6010 - Goals and Objectives)

(cf. 6011 - Academic Standards)

(cf. 6141 - Curriculum Development and Evaluation)

(cf. 6146.1 - High School Graduation Requirements)

(cf. 6146.5 - Elementary/Middle School Graduation Requirements)

(cf. 6162.5 - Student Assessment)

(cf. 6162.52 - High School Exit Examination)

(cf. 6190 - Evaluation of the Instructional Program)

4. Hire and support the Superintendent in the implementation of the vision, goals, and policies of the district

(cf. 2121 - Superintendent's Contract)

(cf. 2122 - Superintendent of Schools: Responsibilities and Duties)

5. Conduct regular and timely evaluations of the Superintendent based on the vision, goals, and performance of the

district; and ensure that the Superintendent holds district personnel accountable for successful implementation of the vision, goals, and policies

(cf. 2123 - Evaluation of the Superintendent)

(cf. 4000 - Concepts and Roles)

(cf. 4111 - Recruitment and Selection)

(cf. 4115 - Evaluation/Supervision)

(cf. 4151/4251/4351 - Employee Compensation)

(cf. 4211- Recruitment and Selection)

(cf. 4215 - Evaluation/Supervision)

(cf. 4311- Recruitment and Selection)

(cf. 4315 - Evaluation/Supervision)

6. Adopt a fiscally responsible budget aligned with the district's vision and goals, and regularly monitor the fiscal solvency of the district

(cf. 3000 - Concepts and Roles)

(cf. 3100 - Budget)

(cf. 3312 - Contracts)

(cf. 3460 - Financial Reports and Accountability)

7. Ensure that a safe and appropriate educational environment and facilities are provided

(cf. 0450 - Comprehensive Safety Plan)

(cf. 3516 - Emergencies and Disaster Preparedness Plan)

(cf. 7110 - Facilities Master Plan)

(cf. 7150 - Site Selection and Development)

(cf. 7210 - Facilities Financing)

8. Establish a framework for the district's collective bargaining process and adopt responsible agreements with each contractual bargaining unit

(cf. 4141/4241 - Collective Bargaining Agreement)

(cf. 4143/4243 - Negotiations/Consultation)

9. Provide community leadership on educational issues and advocate on behalf of students and public education at the local, state, and federal levels

(cf. 0510 - School Accountability Report Card)

(cf. 1020 - Youth Services)

(cf. 1100 - Communication with the Public)

(cf. 1112 - Media Relations)

(cf. 1160 - Political Processes)

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

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

(cf. 9010 - Public Statements)

10. Convene as a judicial and appeals body and serve as the final decision-maker in accordance with law, Board policies, and negotiated agreements

(cf. 1312 - Complaints Concerning the Schools)

(cf. 1312.1 - Complaints Concerning District Employees)

(cf. 1312.3 - Uniform Complaint Procedures)

(cf. 4031 - Complaints Concerning Discrimination in Employment)

(cf. 4117.3 - Personnel Reduction)

(cf. 4117.4 - Dismissal)

(cf. 4144/4244/4344 - Complaints)

(cf. 4218 - Dismissal/Suspension/Disciplinary Action)

(cf. 5116.1 - Intradistrict Open Enrollment)

(cf. 5117 - Interdistrict Attendance)

(cf. 5119 - Students Expelled from Other Districts)

(cf. 5125.3 - Challenging Student Records)

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

(cf. 6159.1 - Procedural Safeguards and Complaints for Special Education)

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

The Board is authorized to establish and finance any program or activity that is not in conflict with, inconsistent with, or preempted by law. (Education Code 35160)

---

**Bylaw 9005: Governance Standards**

Status: ADOPTED

Original Adopted Date: 01/24/2012

The Governing Board believes that its primary responsibility is to act in the best interests of every student in the district. The Board also has major commitments to parents/guardians, all members of the community, employees, the state of California, laws pertaining to public education, and established policies of the district. To maximize Board effectiveness and public confidence in district governance, Board members are expected to govern responsibly and hold themselves to the highest standards of ethical conduct.

(cf. 9000 - Role of the Board)

(cf. 9270 - Conflict of Interest)

The Board expects its members to work with each other and the Superintendent to ensure that a high-quality education is provided to each student. Each individual Board member shall:

1. Keep learning and achievement for all students as the primary focus

2. Value, support, and advocate for public education

(cf. 9010 - Public Statements)

3. Recognize and respect differences of perspective and style on the Board and among staff, students, parents, and the community

4. Act with dignity, and understand the implications of demeanor and behavior

5. Keep confidential matters confidential

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

6. Participate in professional development and commit the time and energy necessary to be an informed and effective leader

(cf. 9240 - Board Development)

7. Understand the distinctions between Board and staff roles, and refrain from performing management functions that are the responsibility of the Superintendent and staff

(cf. 2122 - Superintendent of Schools: Responsibilities and Duties)

8. Understand that authority rests with the Board as a whole and not with individuals

(cf. 9200 - Members)

Board members also shall assume collective responsibility for building unity and creating a positive organizational culture. To operate effectively, the Board shall have a unity of purpose and:

1. Keep the district focused on learning and achievement for all students

2. Communicate a common vision

(cf. 0000 - Vision)

(cf. 0100 - Philosophy)

(cf. 0200 - Goals for the School District)

3. Operate openly, with trust and integrity

4. Govern in a dignified and professional manner, treating everyone with civility and respect

5. Govern within Board-adopted policies and procedures

(cf. 9311 - Board Policies)

(cf. 9312 - Board Bylaws)

6. Take collective responsibility for the Board's performance

7. Periodically evaluate its own effectiveness

(cf. 9400 - Board Self-Evaluation)

8. Ensure opportunities for the diverse range of views in the community to inform Board deliberations

(cf. 1220 - Citizen Advisory Committees)

(cf. 9323 - Meeting Conduct)

---

**Bylaw 9010: Public Statements**

**Status:** ADOPTED

**Original Adopted Date:** 01/24/2012

---

The Governing Board recognizes the rights of Board members to freely express their views and encourages open discussion of issues during the Board meeting. The Board believes that effective Board members have a responsibility to express themselves, whether in agreement or disagreement with the Board majority, in ways that promote the Board's ability to govern the district.

When speaking to community groups, the media, or other members of the public, individual Board members should recognize that their statements may be perceived as reflecting the views and positions of the Board as a whole.

Board members have a responsibility to identify personal viewpoints as such and not as the viewpoint of the Board.

All public statements authorized to be made on behalf of the Board shall be made by the Board president or, if appropriate, by the Superintendent or other designated representative.

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

(cf. 9200 - Members)

---

**Bylaw 9011: Disclosure Of Confidential/Privileged Information**

Status: ADOPTED

Original Adopted Date: 01/24/2012

The Governing Board recognizes the importance maintaining the confidentiality of information acquired as part of a Board member's official duties. Confidential/privileged information shall be released only to the extent authorized by law.

(cf. 9000 - Role of the Board)

(cf. 9005 - Governance Standards)

(cf. 9010 - Public Statements)

Disclosure of Closed Session Information

A Board member shall not disclose confidential information acquired during a closed session to a person not entitled to receive such information, unless a majority of the Board has authorized its disclosure. (Government Code 54963)

Confidential information means a communication made in a closed session that is specifically related to the basis for the Board to meet lawfully in closed session. (Government Code 54963)

(cf. 4119.23/4219.23/4319.23 - Unauthorized Release of Confidential/Privileged Information)

(cf. 9321 - Closed Session Purposes and Agendas)

(cf. 9321.1 - Closed Session Actions and Reports)

The Board shall not take any action against any person for disclosing confidential information, nor shall the disclosure be considered a violation of the law or Board policy, when the person is: (Government Code 54963)

1. Making a confidential inquiry or complaint to a district attorney or grand jury concerning a perceived violation of law, including disclosing facts necessary to establish the illegality or potential illegality of a Board action that has been the subject of deliberation during a closed session
2. Expressing an opinion concerning the propriety or legality of Board action in closed session, including disclosure of the nature and extent of the illegal or potentially illegal action
3. Disclosing information that is not confidential

Other Disclosures

A Board member shall not disclose, for pecuniary gain, confidential information acquired in the course of his/her official duties. Confidential information includes information that is not a public record subject to disclosure under the Public Records Act, information that by law may not be disclosed, or information that may have a material financial effect on the Board member. (Government Code 1098)

(cf. 4112.6/4212.6/4312.6 - Personnel Files)

(cf. 5125 - Student Records)

Disclosures excepted from this prohibition are those made to law enforcement officials or to the joint legislative audit committee when reporting on improper governmental activities. (Government Code 1098)

---

**Bylaw 9100: Organization**

**Status:** ADOPTED

**Original Adopted Date:** 10/28/1997 | **Last Revised Date:** 10/08/2019 | **Last Reviewed Date:** 10/08/2019

**Annual Organizational Meeting**

Each year, the Governing Board shall hold an annual organizational meeting. In any year in which a regular election of district Board members is conducted, the organizational meeting shall be held within a 15-day period beginning from the date upon which a Board member elected at that election takes office. During non-election years, the meeting shall be held within the same 15-day period on the calendar. (Education Code 35143)

The day and time of the annual meeting shall be selected by the Board at its regular meeting held immediately prior to the first day of the 15-day period. On behalf of the Board, the Superintendent shall notify the County Superintendent of Schools of the day and time selected.

Within 15 days prior to the date of the annual meeting, the clerk of the Board, with the assistance of the Superintendent, shall notify in writing all Board members and members-elect of the date and time selected for the meeting. (Education Code 35143)

At this meeting the Board shall:

1. Elect a President and a Clerk from its members.
2. Appoint the Superintendent as Secretary to the Board.
3. Authorize signatures.
4. Develop a schedule of regular meetings for the year.
5. Develop a Board calendar for the year.
6. Designate Board representatives to serve on committees or commissions of the district, other public agencies, or organizations with which the district partners or collaborates.

**Election of Officers**

The California Attorney General has disapproved secret ballot voting in open meetings, as well as the casting of mail ballots. (68 Ops. Cal. Atty. Gen. 65, 1985) As long as they do not use secret ballots, Boards are free to elect their officers in any way they desire.

**Nomination of the President of the Board:**

- \* The Secretary opens the nominations for President.
- \* One or more nominations are offered by Board Members.
- \* Members may not nominate themselves nor second their nomination but may vote for themselves.
- \* The Secretary closes the nominations for the office of President.
- \* The Board will vote individually, by roll call, for their choice for President from the list of all candidates nominated.
- \* If more than one person is nominated, the individual receiving the most votes is elected to the position.
- \* Voting continues until a candidate receives at least four votes.
- \* The Secretary announces the Board Member elected to the office of the President.

**Nomination of the Clerk of the Board:**

- \* The Secretary opens the nomination for Clerk of the Board.

- \* One or more nominations are offered by Board Members.
- \* Members may not nominate themselves nor second their nomination but may vote for themselves.
- \* The Secretary closes the nominations for Clerk of the Board.
- \* The Board will vote individually, by roll call, for their choice for Clerk of the Board from the list of all candidates nominated.
- \* If more than one person is nominated, the individual receiving the most votes is elected to the position.
- \* Voting continues until a candidate receives at least four votes.
- \* The Secretary announces the Board Member elected to the office of Clerk of the Board.

In the case where there is only one nomination for President and/or Clerk, the Secretary may ask for a motion and a second to cast a unanimous ballot for the position(s).

The term of office shall be for one year. No Board member shall serve more than two consecutive years in the same office.

The election of Board officers shall be conducted during an open session of the annual organizational meeting.

---

**Bylaw 9110: Terms Of Office**

**Status:** ADOPTED

**Original Adopted Date:** 01/24/2012

---

The Governing Board shall consist of seven members whose terms shall be staggered so that as nearly as practicable, one half of the members shall be elected in each even-numbered year.

The term of office for members elected in regular elections shall be four years, commencing on the first Friday in December next succeeding their election. (Education Code 5017)

Commencing in 1998, Board member terms expire four years after their initial election on the first Friday in December following the election of new members. (Education Code 5000)

A member whose term has expired shall continue to discharge the duties of the office until his/her successor has qualified by taking the oath of office. (Government Code 1302, 1360; Education Code 5017)

(cf. 9220 - Elections)

(cf. 9223 - Filling Vacancies)

(cf. 9224 - Oath or Affirmation)

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

---

**Bylaw 9121: President**

**Status:** ADOPTED

**Original Adopted Date:** 01/24/2012

The president shall preside at all Governing Board meetings. He/she shall:

1. Call the meeting to order at the appointed time
2. Announce the business to come before the Board in its proper order
3. Enforce the Board's policies relating to the order of business and the conduct of meetings
4. Recognize persons who desire to speak, and protect the speaker who has the floor from disturbance or interference
5. Explain what the effect of a motion would be if it is not clear to every member
6. Restrict discussion to the question when a motion is before the Board
7. Rule on parliamentary procedure
8. Put motions to a vote, and state clearly the results of the vote

The president shall have all the rights of any member of the Board, including the right to move, second, discuss, and vote on all questions before the Board.

The Board President shall also perform other duties as directed by law, State Department of Education regulations and the Board, including the duty to:

1. Sign all instruments, acts, and orders necessary to carry out state requirements and the will of the Board
2. Consult with the Superintendent or designee on the preparation of the Board's agendas
3. Appoint and disband all committees, subject to Board approval
4. Call such meetings of the Board as he/she may deem necessary, giving notice as prescribed by law
5. Confer with the Superintendent or designee on crucial matters which may occur between Board meetings and report back to the Board
6. Be responsible for the orderly conduct of all Board meetings
7. Share informational mail with other Board members

(cf. 9320 - Meetings and Notices)

When the president resigns or is absent or disabled, the clerk shall perform the president's duties. When both the president and clerk are absent or disabled, the Board shall choose a president pro tempore to perform the president's duties.

---

**Bylaw 9122: Secretary**

**Status:** ADOPTED

**Original Adopted Date:** 01/24/2012

---

The Superintendent, acting as secretary to the Governing Board, shall have the following duties:

1. Prepare and maintain the Board agenda
  2. Prepare and maintain the Board minutes
  3. Maintain Board records and documents
  4. Submit to Board officers the correspondence addressed to them
  5. Other duties as assigned by the Board
-

**Bylaw 9123: Clerk**

Status: ADOPTED

**Original Adopted Date:** 01/24/2012

---

At the annual organizational meeting, the Governing Board shall appoint a clerk from its own membership.

The duties of the clerk shall be to:

1. Certify or attest to actions taken by the Board when required
2. Maintain such other records or reports as required by law
3. Sign the minutes of the Board meetings following their approval
4. Sign documents as directed by the Board on behalf of the district, and sign all other items which require the signature of the clerk
5. Serve as presiding officer in the absence of the president
6. Perform any other duties assigned by the Board

When the clerk resigns or is absent or disabled, the Board shall choose a clerk pro tempore to perform the clerk's duties.

---

---

**Bylaw 9124: Attorney**

**Status:** ADOPTED

**Original Adopted Date:** 01/24/2012

---

The Governing Board recognizes the complex legal environment in which school districts operate and desires reliable, dependable legal advice. The Board also supports collaborative legal efforts with other agencies and districts in order to promote the district's interests.

(cf. 1160 - Political Processes)

The Board may use the county counsel, district attorney, or private attorneys to meet the needs of the district.

The district's legal counsel may:

1. Render legal advice to the Board and the Superintendent or designee
2. Serve the Board and the Superintendent or designee in the preparation and conduct of district litigation and administrative proceedings
3. Render advice on school bond and tax increase measures and prepare the necessary forms for the voting of these measures
4. Perform other administrative duties as assigned by the Board and Superintendent or designee

The Superintendent may confer with the district's legal counsel at his/her discretion. The Superintendent shall provide the Board with desired legal information when so directed by a majority of the Board. The Board shall authorize the Board President to confer with legal counsel on behalf of the Board.

(cf. 9000 - Role of the Board)

(cf. 9200 - Members)

(cf. 9321 - Closed Session Purposes and Agendas)

---

---

**Bylaw 9130: Board Committees**

Status: ADOPTED

Original Adopted Date: 01/24/2012

---

The Governing Board may establish Board committees as necessary. The Board shall determine the duties of the committee at the time of its appointment. Unless specifically authorized by the Board to act on its behalf, Board committees shall act in an advisory capacity. When its duties have been completed, the committee shall be dissolved.

(cf. 1220 - Citizen Advisory Committees)

Board committees shall provide public notice of their meetings and conduct these meetings in accordance with state open meeting laws.

Meetings of advisory committees or standing committees for which an agenda is posted at least 72 hours in advance of the meeting pursuant to Government Code 54954.2, shall be considered, for purposes of the Brown Act, as regular meetings of the Board. (Government Code 54954)

(cf. 9320 - Meetings and Notices)

(cf. 9322 - Agenda/Meeting Materials)

Board advisory committees composed solely of less than a quorum of the members of the Board are not subject to open meeting laws unless they are standing committees that have a continuing subject matter jurisdiction or a meeting schedule established by the Board. (Government Code 54952)

Standing committees with a continuing subject matter jurisdiction include but are not limited to those responsible for providing advice on budgets, audits, contracts and personnel matters at the Board's request.

When a majority of the members of the Board attend an open and noticed meeting of a standing committee, the Board members who are not members of the standing committee shall attend only as observers. (Government Code 54952.2)

The Superintendent or designee may serve as an advisor to any committee at the discretion of the Board.

Whenever so charged, committees may actively seek input and participation by parents/guardians, staff, community, and students and may consult with local public boards and agencies.

When a Board committee composed exclusively of Board members has provided for public comment on an item at a public meeting before or during the committee's consideration of the item, the Board is not obliged to provide for public comment on the item at a subsequent Board meeting. Public comment shall be afforded, however, if the Board determines that the item has been substantially changed since it was heard by the committee. (Government Code 54954.3)

---

---

**Bylaw 9140: Board Representatives**

Status: ADOPTED

**Original Adopted Date:** 01/24/2012

---

The Governing Board may appoint any of its members to serve as its representatives on district committees or advisory committees of other public agencies or organizations. Due to open meeting law requirements, a majority of the Board shall not be appointed to serve on the same committee.

(cf. 9270 - Conflict of Interest)

(cf. 9320 - Meetings and Notices)

When making such appointments, the Board shall clearly specify, on a case-by-case basis, what authority and responsibilities are involved. Board representatives shall not grant district support or endorsement for any activity without prior Board approval.

If a committee discusses a topic on which the Board has taken a position, the Board member may express that position as a representative of the Board. When contributing individual ideas or opinions on other topics, he/she shall make it clear that he/she is speaking as an individual, not on behalf of the Board.

(cf. 1220 - Citizen Advisory Committees)

(cf. 9010 - Public Statements)

(cf. 9130 - Board Committees)

At its annual organizational meeting, the Board shall designate one Board member as its representative to elect members to the county committee on school district organization. (Education Code 35023)

The Board shall provide the representative with nominees to this committee.

A Board member is eligible to serve as a member of the county committee on school district organization. (Education Code 4007)

(cf. 9100 - Organization)

At its annual organizational meeting, the Board shall appoint Board members to serve as representatives of the Board to the following committees:

1. City/Schools/Cuesta Liaison Committee (joint committee with the City of El Paso de Robles and Cuesta College) - three representatives
2. Board of the Santa Lucia Regional Occupational Program - one representative and one alternate
3. Legislative representative - one representative
4. District Safety Committee - two representatives
5. District Parent Council - three representatives
6. Paso Robles Youth Task Force - one representative
7. Adelaida Historical Foundation - one representative
8. Board Bylaw Committee - three representatives

The Board may appoint any of its members to be a representative of the Board to other committees or advisory groups as needed during the year. It is expected that Board representatives to committees attend a minimum of 70 percent of the regularly scheduled meetings of the committee, and to report regularly to the Board.

---

**Regulation 9150: Student Board Members**

**Status:** DRAFT

**Original Adopted Date:** Pending

---

Duties of Student Board Representative

The duties of the student Board representative include the following:

1. To provide school site student information for Board deliberations
2. To strengthen communications between the Board and district students

Selection and Term

The student Board representative shall be elected or appointed with the consent of the ASB and Principal of the school.

---

---

**Bylaw 9200: Limits Of Board Member Authority**

Status: DRAFT

Original Adopted Date: Pending

---

Limits of Board Members Authority

The Governing Board is the unit of authority over the district. It has broad but clearly limited powers. The exercise of its authority is restricted to the functions required or permitted by law, and then only when it acts in a legally constituted meeting.

(cf. 9000 - Role of the Board)

The Board member has no individual authority. Individually, the Board member may not commit the district to any policy, act, or expenditure. The Board member cannot do business with the district served, nor should the Board member have an interest in any contract with the school district. The Board member represents and acts for the community as a whole and does not represent any factional segment of the community.

(cf. 9270 - Conflict of Interest)

Individual members of the Board, by virtue of holding office, shall not exercise any administrative responsibility with respect to the schools or command the services of any school employee. Individual Board members shall submit requests for information to the Superintendent. At his/her discretion, the Superintendent may refer the request to the entire Board for consideration. If approved, the Superintendent or designee shall perform any necessary research associated with the request and report to the Board at a future meeting.

(cf. 1340 - Access to District Records)

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

Obligations of Board Members

Board members should hold the education of children and youth above any partisan principle, group interest, or personal interest.

Board members should understand their role and the programs offered by the district. They should study all agenda materials before the meeting, participate in the discussion of items which come before the Board, vote on motions and resolutions, and abstain only for a stated conflict of interest.

(cf. 9240 - Board Development)

(cf. 9271 - Code of Ethics)

(cf. 9320 - Meetings and Notices)

Board members shall refer Board-related correspondence to the Superintendent or designee for forwarding to the Board or for placement on the Board's agenda.

(cf. 9322 - Agenda/Meeting Materials)

Board members and persons elected to the Board are responsible for complying with the requirements of the state's open meeting laws.

The Superintendent or designee shall provide a copy of the Brown Act to each Board member and to anyone who is elected to the Board.

---

**Bylaw 9220: Governing Board Elections**

**Status:** ADOPTED

**Original Adopted Date:** 01/24/2012

---

Any person is eligible to be a Governing Board member, without further qualifications, if he or she is 18 years of age or older, a citizen of the state, a resident of the school district, a registered voter, and not legally disqualified from holding civil office. (Education Code 35107)

A district employee elected to the Board shall resign his/her position before being sworn in or shall have his/her employment automatically terminated upon being sworn into office. (Education Code 35107)

(cf. 9270 - Conflict of Interest)

When possible, Board election procedures shall be conducted in accordance with the California Education Code and Elections Code.

(cf. 9110 - Terms of Office)

Statement of Qualifications

The district shall assume no part of the cost of printing, handling, translating, or mailing candidate statements filed pursuant to Elections Code 13307.

The Board secretary shall notify the county clerk of this policy on or before the 125th day before each Board member election. (Elections Code 10509)

Tie Votes in Board Member Elections

Whenever a tie makes it impossible to determine which of two or more candidates has been elected to the Board, the Board shall immediately notify the candidates who received the tie votes of the time and place where lots shall be cast to determine the winner. (Education Code 5016)

---

**Bylaw 9222: Resignation**

Status: ADOPTED

**Original Adopted Date:** 01/24/2012

---

A Governing Board member who wishes to resign may do so by filing a written resignation with the County Superintendent of Schools. (Education Code 5090)

A copy shall be given to the Board secretary.

The written resignation is effective when filed, except when a deferred effective date is specified in the resignation. (Education Code 5090)

A Board member may not defer the effective date of his/her resignation for more than 60 days after filing. (Education Code 5091)

A written resignation, whether specifying a deferred effective date or otherwise, shall be irrevocable upon being filed. (Education Code 5090)

Upon resignation, the Board member may continue to exercise all his/her powers, save that of voting for a successor, until the effective date of resignation. (Education Code 35178)

(cf. 9270 - Conflict of Interest)

---

**Bylaw 9223: Filling Vacancies**

Status: ADOPTED

Original Adopted Date: 01/24/2012

Events Causing a Vacancy

A vacancy on the Governing Board may occur by a failure to elect or for any of the following events:

1. The death of an incumbent (Government Code 1770)
2. The adjudication pursuant to a quo warranto proceeding declaring that an incumbent is physically or mentally incapacitated due to disease, illness, or accident and that there is reasonable cause to believe that the incumbent will not be able to perform the duties of his/her office for the remainder of his/her term (Government Code 1770)
3. A Board member's resignation (Government Code 1770)

A vacancy resulting from resignation occurs when the written resignation is filed with the County Superintendent of Schools having jurisdiction over the district, except where a deferred effective date is specified in the resignation so filed, in which case the resignation shall become operative on that date. Upon being filed with the County Superintendent, a written resignation, whether specifying a deferred effective date or otherwise, shall be irrevocable. (Education Code 5090)

A Board member may not defer the effective date of his/her resignation for more than 60 days after he/she files the resignation with the County Superintendent.

4. A Board member's removal from office, including recall (Government Code 1770; Elections Code 11384)
5. A Board member's ceasing to be an inhabitant of the state or resident of the district (Government Code 1770)

A vacancy on the Board also occurs when a Board member ceases to inhabit the trustee area which he/she represents on the Board. (58 Ops.Cal.Atty.Gen. 888 (1975))

6. A Board member's absence from the state beyond the period allowed by law without the permission required by law (Government Code 1770)

No Board member shall be absent from the state for more than 60 days within a calendar year, except in any of the following situations: (Government Code 1064)

- a. Upon business of the school district with the approval of the Board
- b. With the consent of the Board for an additional period not to exceed a total absence of 90 days within a calendar year
- c. For federal military deployment not to exceed six months as a member of the armed forces of the United States or the California National Guard within a calendar year

If the absence of the Board member for this purpose exceeds six months, the Board may approve an additional six-month absence upon a showing that there is a reasonable expectation that the member will return within the second six-month period, and the Board may appoint an interim member to serve in his/her absence. If two or more members of the Board are absent by reason of these circumstances, and those absences result in the inability to establish a quorum at a regular meeting, the Board may immediately appoint one or more interim members, as necessary to enable the Board to conduct business and discharge its responsibilities.

- d. In the case of illness or other urgent necessity, and upon a proper showing thereof, the time limited for absence from the state may be extended by the Board for an additional period not to exceed 30 days within a calendar year.

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

7. A Board member's ceasing to discharge the duties of his/her office for the period of three consecutive months, except when prevented by sickness or when absent from the state with the permission required by law (Government Code 1770)

8. A Board member's conviction of a felony or any offense involving a violation of his/her official duties (Government Code 1770)

9. A Board member's refusal or neglect to file his/her required oath or bond within the time prescribed (Government Code 1770)

(cf. 9224 - Oath or Affirmation)

10. The decision of a competent tribunal declaring void a Board member's election or appointment (Government Code 1770)

11. The making of an order vacating a Board member's office or declaring the office vacant when the officer fails to furnish an additional or supplemental bond (Government Code 1770)

12. A Board member's commitment to a hospital or sanitarium by a court of competent jurisdiction as a drug addict, dipsomaniac, inebriate, or stimulant addict; in this event, the office shall not be deemed vacant until the order of commitment has become final (Government Code 1770)

#### Timelines for Filling a Vacancy

When a vacancy occurs, the Board shall take the following action, as appropriate:

1. When a vacancy occurs less than four months before the end of a Board member's term, the Board shall take no action. (Education Code 5093)

2. When a vacancy occurs four or more months before the end of a Board member's term, the Board shall, within 60 days of the date of the vacancy or the filing of the member's deferred resignation, either order an election or make a provisional appointment, unless a special election is mandated as described below. (Education Code 5091)

3. When a vacancy occurs from six months to 130 days before a regularly scheduled Board election at which the position is not scheduled to be filled, a special election to fill the position shall be consolidated with the regular election. The person so elected shall take office at the first regularly scheduled Board meeting following the certification of the election and shall serve only until the end of the term of the position which he/she was elected to fill. (Education Code 5093)

#### Provisional Appointments

When the special election described above is not required, the Board may make a provisional appointment. (Education Code 5091, 5093)

In order to draw from the largest possible number of candidates, the Board shall advertise in the local media to solicit candidate applications or nominations. A committee consisting of less than a quorum of the Board shall ensure that applicants are eligible for Board membership and announce the names of the eligible candidates. The Board shall interview the candidates at a public meeting, accept oral or written public input, and select the provisional appointee by a majority vote.

(cf. 9130 - Board Committees)

(cf. 9220 - Governing Board Elections)

(cf. 9323.2 - Actions by the Board)

In order to serve on the Board, a person must meet the eligibility requirements specified in Education Code 35107.

(cf. 9220 - Governing Board Elections)

Within 10 days after the appointment is made, the Board shall post notices of the actual vacancy, or the filing of a deferred resignation, and the provisional appointment. The notice

shall be published in the local newspaper pursuant to Government Code 6061 and posted in at least three public places within the district. (Education Code 5092)

The notice shall contain: (Education Code 5092)

1. The date of the occurrence of the vacancy or the date of the filing of, and the effective date of, the resignation

2. The full name of the appointee

3. The date of appointment

4. A statement notifying the voters that unless a petition calling for a special election pursuant to Education Code 5091 is filed in the office of the County Superintendent of Schools within 30 days of the provisional appointment, it shall become an effective appointment

The person appointed shall hold office until the next regularly scheduled election for district Board members and shall be afforded all the powers and duties of a Board member upon appointment. (Education Code 5091)

---

**Exhibit 9223-E(1): Filling Vacancies**

**Status:** ADOPTED

**Original Adopted Date:** 09/16/2019

*See PDF on the next page.*

Events causing vacancy before expiration of term (Government Code 1770)

An office becomes vacant on the happening of any of the following events before the expiration of the term:

- (a) The death of the incumbent
- (b) The adjudication pursuant to a quo warranto proceeding declaring that the incumbent is physically or mentally incapacitated due to disease, illness or accident and that there is reasonable cause to believe that the incumbent will not be able to perform the duties of his/her office for the remainder of his/her term
- (c) His/her resignation
- (d) His/her removal from office
- (e) His/her ceasing to be an inhabitant of the district for which the officer was chosen or appointed or within which the duties of his/her office are required to be discharged
- (f) His/her absence from the state without the permission required by law beyond the period allowed by law
- (g) His/her ceasing to discharge the duties of his/her office for the period of three consecutive months, except when prevented by sickness or when absent from the state with the permission required by law
- (h) His/her conviction of a felony or any offense involving a violation of his/her official duties. An officer shall be deemed to have been convicted under this subdivision when trial court judgment is entered. For the purposes of this subdivision, "trial court judgment" means a judgment by the trial court either sentencing the officer or otherwise upholding and implementing the plea, verdict or finding.
- (i) His/her refusal or neglect to file his/her required oath or bond within the time prescribed
- (j) The decision of a competent tribunal declaring void his/her election or appointment
- (k) The making of an order vacating his/her office or declaring the office vacant when the officer fails to furnish an additional or supplemental bond
- (l) His/her commitment to a hospital or sanitarium by a court of competent jurisdiction as a drug addict, dipsomaniac, inebriate or stimulant addict; in this event, the office shall not be deemed vacant until the order of commitment has become final.

Absence from state; members of governing board of school districts; conditions (Government Code 1064)

No member of the governing board of a school district shall be absent from the state for more than 60 days, except in any of the following situations:

- (a) Upon business of the school district with the approval of the board
- (b) With the consent of the governing board of the school district for an additional period not to exceed a total absence of 90 days

(c) For federal military deployment not to exceed six months as a member of the armed forces of the United States or the California National Guard

In the case of illness or other urgent necessity, and upon a proper showing thereof, the time limited for absence from the state may be extended by the governing board of the school district for an additional period not to exceed 30 days.

PASO ROBLES PUBLIC SCHOOL

Paso Robles, California

**Bylaw 9224: Oath Or Affirmation**

**Status:** ADOPTED

**Original Adopted Date:** 10/14/2003

---

Prior to entering upon the duties of their office, all Governing Board members shall take the oath or affirmation required by law. (California Constitution, Article 20, Section 3; Government Code 1360)

(cf. 4112.3/4212.3/4312.3 - Oath or Affirmation)

The oath may be administered and certified by a Board member, secretary or assistant secretary to the Board, Superintendent, deputy or assistant superintendent, principal, or County Superintendent of Schools or any other person authorized in Education Code 60.

The executed oath shall be filed with the County Clerk. (Government Code 1363)

---

---

**Bylaw 9230: Orientation**

Status: ADOPTED

Original Adopted Date: 01/24/2012

---

**Board Candidate Orientation**

The Governing Board desires to provide Board candidates with orientation that will enable them to understand the responsibilities of Board membership. The Superintendent or designee shall provide all candidates with general information about school programs, district operations, and Board responsibilities.

(cf. 9200 - Members)

(cf. 9270 - Conflict of Interest)

The Board encourages all candidates to attend public Board meetings during the period of their candidacy. Candidates have the same access as members of the public to district staff and information.

(cf. 1340 - Access to District Records)

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

**New Board Member Orientation**

The Board and the Superintendent or designee shall help each new member-elect to understand district operations and the Board's functions, policies, and procedures as soon after election as possible. Incoming members shall be given a copy of the Brown Act and informed that they must conform to its requirements as if they had already assumed office. Incoming members shall also receive the district's policy manual and other materials related to the school system and Board member responsibilities.

Incoming members are encouraged to attend Board meetings and meet with the Superintendent or designee and Board president regarding their role and responsibilities. They also may, at district expense if the budget allows, attend workshops for newly elected members as outlined in the bylaw for Board Development.

(cf. 9240 - Board Development)

---

**Bylaw 9240: Board Training**

Status: DRAFT

**Original Adopted Date:** Pending

---

Citizens elected to the Governing Board are entrusted with the responsibility of governing district schools. The Board recognizes that its members need training that helps them understand their responsibilities, stay abreast of new developments in education, and develop boardmanship skills.

All Board members may attend conferences for the purpose of Board development. Board business shall not be discussed at conferences.

(cf. 9230 - Orientation)

(cf. 9320 - Meetings and Notices)

Board members shall report to the Board, orally or in writing, as soon as possible on the Board development activities they attend.

Board members shall receive Board approval prior to attendance at Board development activities funded from district funds.

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

---

**Bylaw 9250: Remuneration, Reimbursement And Other Benefits**

Status: ADOPTED

Original Adopted Date: 01/24/2012

Remuneration

Each member of the Governing Board may receive a monthly compensation of no more than \$240.00.

On an annual basis, the Board may increase the compensation of Board members beyond the limit delineated in Education Code 35120 in an amount not to exceed five percent based on the present monthly rate of compensation. Any increase made pursuant to this section shall be effective upon approval by the Board. (Education Code 35120)

Board members are not required to accept payment for meetings attended.

If a member does not attend all regularly scheduled Board meetings during the month, he/she is eligible to receive a percentage of the monthly compensation equal to the percentage of meetings attended unless otherwise authorized by the Board in accordance with law. (Education Code 35120)

A member may be paid for meetings he/she missed when the Board, by resolution, finds that he/she was performing designated services for the district at the time of the meeting or that he/she was absent because of illness, jury duty, or a hardship deemed acceptable by the Board. (Education Code 35120)

Reimbursement of Expenses

Board members may be reimbursed for traveling expenses incurred when authorized in advance by the Board. (Education Code 35044)

(cf. 9240 - Board Development)

The rate of reimbursement shall be the same rate specified for district personnel.

(cf. 3350 - Travel Expenses)

Board members may use district-issued credit cards while on official district business. Under no circumstances may personal expenses be charged on district credit cards.

Health and Welfare Benefits

Board members may participate in the health and welfare benefits program provided for district employees.

Health and welfare benefits for Board members shall be no greater than that received by district's nonsafety employees. (Government Code 53208.5)

(cf. 4154/4254/4354 - Health and Welfare Benefits)

The district shall pay the cost of all premiums required for Board members electing to participate in the district health and welfare benefits program to the same extent that the district pays premiums for district staff in accordance with Government Code 53208.5.

Health and welfare benefits provided to Board members shall be extended at the same level to their spouses, dependent children under the age of 26.

Benefits for Retired Board Members

Retired Board members may participate in the health and welfare benefits program provided for district employees under the conditions specified below.

Any former member whose first term of office began on or after January 1, 1995, and any other member retiring from the Board after at least one term, may continue the health and welfare benefits program at his/her own expense if coverage is in effect at the time of retirement. (Government Code 35201)

Because the district did not pay health and welfare benefits for retired Board members before January 1, 1994, any former member retiring from the Board after at least one term may continue the health and welfare benefits program at his/her own expense if coverage is in effect at the time of retirement. (Government Code 53201)

**Bylaw 9251: ^Equipment, Supplies and Services for Board Members**

Status: DRAFT

Original Adopted Date: Pending

---

Board members may participate in the Master of Boardmanship Program. The Board has authorized funding (6/24/97) over a two-year period of \$2,400 with the condition that requests for participation be approved by the Board in advance.

The Board has authorized a maximum expenditure of \$1,500 per Board member per year, depending on the district's financial condition, for participation at conferences. First year or first term Board members will be allocated an extra \$500 for their first year only. This amount is not transferable. Board member attendance at any conference will necessitate a report back to the entire Board on the conference.

Board members will be allowed an additional \$1,500 per year, depending on the district's financial condition, to attend a National School Boards Conference (NSBA) when in California. This additional amount will not be carried over to the next fiscal year and is not transferable.

Members of the Board who are elected countywide to serve in an office which represents the county may be authorized to travel in conjunction with those official duties. The budget for such travel shall be \$1,200 and shall not be charged to the member's conference budget account.

---

---

**Bylaw 9260: Legal Protection**

**Status:** ADOPTED

**Original Adopted Date:** 01/24/2012

---

Liability Insurance

The Governing Board shall provide insurance necessary to protect Board members and employees while acting within the scope of their office or employment in accordance with Education Code 35208.

(cf. 3530 - Risk Management/Insurance)

Protection Against Liability

No Board member shall be liable for harm caused by his/her act or omission when acting within the scope of district responsibilities. The act or omission must be in conformity with federal, state, and local laws and made in furtherance of an effort to control, discipline, expel, or suspend a student, or maintain order or control in the classroom or school. (20 USC 6736)

The protection against liability shall not apply when: (20 USC 6736)

1. The Board member acted with willful or criminal misconduct, gross negligence, recklessness, or a conscious, flagrant indifference to the harmed person's right to safety.
  2. The Board member caused harm by operating a motor vehicle.
  3. The Board member was not properly licensed, if required, by the state for such activities.
  4. The Board member was found by a court to have violated a federal or state civil rights law.
  5. The Board member was under the influence of alcohol or any drug at the time of the misconduct.
  6. The misconduct constituted a crime of violence pursuant to 18 USC 16 or an act of terrorism for which the Board member has been convicted in a court.
  7. The misconduct involved a sexual offense for which the Board member has been convicted in a court.
-

**Bylaw 9270: Conflict Of Interest**

Status: ADOPTED

Original Adopted Date: 01/24/2012

The Governing Board desires to maintain the highest ethical standards and help ensure that decisions are made in the best interest of the district and the public. In accordance with law, Board members and designated employees shall disclose any conflict of interest and, as necessary, shall abstain from participating in the decision.

(cf. 9005 - Governance Standards)

The Board shall adopt a resolution that specifies the terms of the district's conflict of interest code, the district's designated positions, and the disclosure categories required for each position.

Upon direction by the code-reviewing body, the Board shall review the district's conflict of interest code and submit any changes to the code-reviewing body.

When a change in the district's conflict of interest code is necessitated due to changed circumstances, such as the creation of new designated positions, changes to the duties assigned to existing positions, amendments, or revisions, the amended code shall be submitted to the code-reviewing body within 90 days. (Government Code 87306)

When reviewing and preparing the district's conflict of interest code, the Superintendent or designee shall provide officers, employees, consultants, and members of the community adequate notice and a fair opportunity to present their views. (Government Code 87311)

(cf. 9320 - Meetings and Notices)

Board members and designated employees shall annually file a Statement of Economic Interest/Form 700 in accordance with the disclosure categories specified in the district's conflict of interest code. A Board member who leaves office or a designated employee who leaves district employment shall, within 30 days, file a revised statement covering the period of time between the closing date of the last statement and the date of leaving office or district employment. (Government Code 87302, 87500)

(cf. 4117.2/4217.2/4317.2 - Resignation)

(cf. 9222 - Resignation)

**Conflict of Interest under the Political Reform Act**

A Board member or designated employee shall not make, participate in making, or in any way use or attempt to use his/her official position to influence a governmental decision in which he/she knows or has reason to know that he/she has a disqualifying conflict of interest. A conflict of interest exists if the decision will have a "reasonably foreseeable material financial effect" on one or more of the Board member's or designated employee's "economic interests," unless the effect is indistinguishable from the effect on the public generally or the Board member's or designated employee's participation is legally required. (Government Code 87100, 87101, 87103; 2 CCR 18700-18709)

A Board member or designated employee makes a governmental decision when, acting within the authority of his/her office or position, he/she votes on a matter, appoints a person, obligates or commits the district to any course of action, or enters into any contractual agreement on behalf of the district. (2 CCR 18702.1)

A Board member who has a disqualifying conflict of interest on an agenda item that will be heard in an open meeting of the Board shall abstain from voting on the matter. He/she may remain on the dais, but his/her presence shall not be counted towards achieving a quorum for that matter. A Board member with a disqualifying conflict of interest shall not be present during a closed session meeting of the Board when the decision is considered and shall not obtain or review a recording or any other nonpublic information regarding the issue. (2 CCR 18702.1)

**Conflict of Interest under Government Code 1090**

Board members, employees, or district consultants shall not be financially interested in any contract made by the Board on behalf of the district, including in the development, preliminary discussions, negotiations, compromises, planning, reasoning, and specifications and solicitations for bids. If a Board member has such a financial interest, the district is barred from entering into the contract. (Government Code 1090; Klistoff v. Superior Court, (2007) 157 Cal.App. 4th 469)

A Board member shall not be considered to be financially interested in a contract if his/her interest is a "noninterest" as defined in Government Code 1091.5. One such noninterest is when a Board member's spouse/registered domestic partner has been a district employee for at least one year prior to the Board member's election or appointment. (Government Code 1091.5)

A Board member shall not be considered to be financially interested in a contract if he/she has only a "remote interest" in the contract as specified in Government Code 1091 and if the remote interest is disclosed during a Board meeting and noted in the official Board minutes. The affected Board member shall not vote or debate on the matter or attempt to influence any other Board member to enter into the contract. (Government Code 1091)

Even if there is not a prohibited conflict of interest, a Board member shall abstain from voting on personnel matters that uniquely affect his/her relatives. However, a Board member may vote on collective bargaining agreements and personnel matters that affect a class of employees to which his/her relative belongs. Relative means an adult who is related to the Board member by blood or affinity within the third degree, as determined by the common law, or an individual in an adoptive relationship within the third degree. (Education Code 35107)

A relationship within the third degree includes an individual's parents, grandparents, great-grandparents, children, grandchildren, great-grandchildren, brothers, sisters, aunts, uncles, nieces, nephews, and the similar family of the individual's spouse/registered domestic partner unless the individual is widowed or divorced.

#### Common Law Doctrine Against Conflict of Interest

A Board member shall abstain from any official action in which his/her private or personal interest may conflict with his/her official duties.

#### Rule of Necessity or Legally Required Participation

On a case-by-case basis and upon advice of legal counsel, a Board member with a financial interest in a contract may participate in the making of the contract if the rule of necessity or legally required participation applies pursuant to Government Code 87101 and 2 CCR 18708.

#### Incompatible Offices and Activities

Board members shall not engage in any employment or activity or hold any office which is inconsistent with, incompatible with, in conflict with, or inimical to the Board member's duties as an officer of the district. (Government Code 1099, 1126)

(cf. 4136/4236/4336 - Nonschool Employment)

#### Gifts

Board members and designated employees may accept gifts only under the conditions and limitations specified in Government Code 89503 and 2 CCR 18730.

The limitation on gifts does not apply to wedding gifts and gifts exchanged between individuals on birthdays, holidays, and other similar occasions, provided that the gifts exchanged are not substantially disproportionate in value. (Government Code 89503)

Gifts of travel and related lodging and subsistence shall be subject to the current gift limitation except as described in Government Code 89506.

A gift of travel does not include travel provided by the district for Board members and designated employees. (Government Code 89506)

#### Honoraria

Board members and designated employees shall not accept any honorarium, which is defined as any payment made in consideration for any speech given, article published, or attendance

at any public or private gathering, in accordance with law. (Government Code 89501, 89502)

The term honorarium does not include: (Government Code 89501)

1. Earned income for personal services customarily provided in connection with a bona fide business, trade, or profession unless the sole or predominant activity of the business, trade, or profession is making speeches

2. Any honorarium which is not used and, within 30 days after receipt, is either returned to the donor or delivered to the district for donation into the general fund without being claimed as a deduction from income for tax purposes

---

**Exhibit 9270-E(1): Conflict Of Interest**

**Status:** ADOPTED

**Original Adopted Date:** 01/24/2012

*See PDF on the next page.*

RESOLUTION ADOPTING A CONFLICT OF INTEREST CODE

WHEREAS, the Political Reform Act, Government Code 87300-87313, requires each public agency in California to adopt a conflict of interest code; and

WHEREAS, the Governing Board of the Paso Robles Joint Unified School District has previously adopted a local conflict of interest code; and

WHEREAS, past and future amendments to the Political Reform Act and implementing regulations may require conforming amendments to be made to the district's conflict of interest code; and

WHEREAS, a regulation adopted by the Fair Political Practices Commission, 2 CCR 18730, provides that incorporation by reference of the terms of that regulation, along with an agency-specific appendix designating positions and disclosure categories shall constitute the adoption and amendment of a conflict of interest code in conformance with Government Code 87300 and 87306; and

WHEREAS, the Paso Robles Joint Unified School District has recently reviewed its positions, and the duties of each position, and has determined that (changes/no changes) to the current conflict of interest code are necessary; and

WHEREAS, any earlier resolutions, bylaws, and/or appendices containing the district's conflict of interest code shall be rescinded and superseded by this resolution and Appendix; and

NOW THEREFORE BE IT RESOLVED that the Paso Robles Joint Unified School District Governing Board adopts the following Conflict of Interest Code including its Appendix of Designated Employees and Disclosure Categories.

PASSED AND ADOPTED THIS \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ at a meeting, by the following vote:

AYES: \_\_\_\_\_ NOES: \_\_\_\_\_ ABSENT: \_\_\_\_\_

Attest:

\_\_\_\_\_

Secretary/President

Conflict of Interest Code of the

Paso Robles Joint Unified School District

The provisions of 2 CCR 18730 and any amendments to it adopted by the Fair Political Practices Commission, together with the attached Appendix specifying designated positions and disclosure categories, are incorporated by reference and shall constitute the district's conflict of interest code.

Governing Board members and designated employees shall file a Statement of Economic Interest/Form 700 in accordance with the disclosure categories listed in the attached Appendix. The Statement of Economic Interest shall be filed with the district's filing officer and/or, if so required, with the district's code reviewing body. The district's filing officer shall make the statements available for public review and inspection.

## APPENDIX

### Disclosure Categories

1. Category 1: A person designated Category 1 shall disclose:

- a. Interests in real property located entirely or partly within district boundaries, or within two miles of district boundaries, or of any land owned or used by the district
- b. Investments or business positions in or income from sources which are engaged in the acquisition or disposal of real property within the district, are contractors or subcontractors which are or have been within the past two years engaged in work or services of the type used by the district, or manufacture or sell supplies, books, machinery, or equipment of the type used by the district

2. Category 2: A person designated Category 2 shall disclose:

- a. Investments or business positions in or income from sources which are contractors or subcontractors engaged in work or services of the type used by the department which the designated person manages or directs
- b. Investments or business positions in or income from sources which manufacture or sell supplies, books, machinery, or equipment of the type used by the department which the designated person manages or directs. For the purposes of this category, a principal's department is his/her entire school

### Designated Positions

#### Designated Position Disclosure Category

Governing Board Members 1

Superintendent of Schools 1

Assistant/Associate Superintendent 1

Purchasing Agent 1

Director 2

Principal 2

Assistant Principal 2

Maintenance and Operations Director 2

Program Coordinator 2

Project Specialist 2

Supervisor 2

Dean of Students 2

## Disclosures for Consultants

Consultants are designated employees who must disclose financial interests as determined on a case-by-case basis by the Superintendent or designee. The Superintendent or designee's written determination shall include a description of the consultant's duties and a statement of the extent of disclosure requirements based upon that description. All such determinations are public records and shall be retained for public inspection along with this conflict of interest code.

A consultant is an individual who, pursuant to a contract with the district, makes a governmental decision whether to: (2 CCR 18701)

1. Approve a rate, rule, or regulation
2. Adopt or enforce a law
3. Issue, deny, suspend, or revoke a permit, license, application, certificate, approval, order, or similar authorization or entitlement
4. Authorize the district to enter into, modify, or renew a contract that requires district approval
5. Grant district approval to a contract that requires district approval and in which the district is a party, or to the specifications for such a contract
6. Grant district approval to a plan, design, report, study, or similar item
7. Adopt or grant district approval of district policies, standards, or guidelines

A consultant is also an individual who, pursuant to a contract with the district, serves in a staff capacity with the district and in that capacity participates in making a governmental decision as defined in 2 CCR 18702.2 or performs the same or substantially all the same duties for the district that would otherwise be performed by an individual holding a position specified in the district's conflict of interest code. (2 CCR 18701)

**Bylaw 9310: Board Policies**

Status: DRAFT

**Original Adopted Date:** Pending

---

The Superintendent or designee shall maintain a district policy manual for the purpose of communicating to all interested parties the policies and regulations within which our schools will operate. The Governing Board encourages members of the public to acquaint themselves with the district's policy manual.

(cf. 9311 - Board Policies)

(cf. 9312 - Board Bylaws)

(cf. 9313 - Administrative Regulations)

The Superintendent or designee shall ensure that the community and all district employees have access to the policy manual. A public copy of the manual shall be maintained in the district central office and at each school site.

(cf. 1340 - Access to District Records)

The Superintendent or designee shall establish procedures for distributing to all authorized manual holders copies of new or revised policies, bylaws, and regulations as they are adopted. Annually, before the Board's organizational meeting, the Superintendent or designee shall have all district policy manuals reviewed to ensure that they are up-to-date and complete.

---

---

**Bylaw 9311-B: N/A**

**Status:** DRAFT

**Original Adopted Date:** Pending

---

Governing Board policies are written statements adopted by the Board which communicate the guidelines within which the Superintendent or designee and staff may take discretionary action.

(cf. 2210 - Administrative Leeway in Absence of Board Policy)

(cf. 9310 - Policy Manual)

The Superintendent or designee shall present drafts or suggestions for new policy and policy revisions when changes in law occur and when specific needs arise.

The Board encourages members of the community to contribute information and opinions for the Board's consideration and to propose revisions to policy. When drafting or revising policies which affect other governmental agencies, the Board welcomes input from these agencies and will cooperate with them in addressing matters of mutual concern.

The Superintendent or designee shall provide for the continuous orderly review of existing policies at a time allocated for this purpose on the agenda of regular Board meetings.

The Board shall review certain policies annually, as required by law. (Education Code 35160.5)

(cf. 5116.1 - Intradistrict Open Enrollment)

(cf. 6145 - Extracurricular and Cocurricular Activities)

The adoption of policy shall conform with Board bylaws governing agendas, meetings, and voting. Only those written statements adopted and recorded in the minutes shall constitute official Board policy.

Before adoption, policies shall normally be given two readings by the Board.

At its second reading, the policy may be adopted by a majority vote of all members of the Board. The Board may waive the second reading or may require additional readings.

When policies are amended, the Superintendent or designee shall review corresponding administrative regulations to ensure that they conform to the intent of the revised policy.

(cf. 9313 - Administrative Regulations)

---

---

**Regulation 9311-R(1): N/A**

**Status:** DRAFT

**Original Adopted Date:** Pending

---

The office of the Superintendent or designee will receive sample policies, regulations and bylaws issued by the California School Boards Association. The following procedures will be followed:

1. The Superintendent or designee will review the samples. If the Governing Board has initiated a committee of its members to participate in policy development, this committee shall also review the samples.
2. Policies, regulations and bylaws mandated by law will be given top priority. The Superintendent or designee will ensure that those mandated by law by a certain date are reviewed, amended if necessary and adopted by the Board within the timeline prescribed by law.
3. Policies will be reviewed for:
  - a. Legal requirements
  - b. Applicability at the local level
  - c. Options legally available to the district
  - d. Future need
4. The Superintendent or designee may delegate the initial task of review and revision to the administrator with appropriate expertise. However, the Superintendent or designee shall retain the responsibility of final review before submitting policies to the Board.
5. Draft policies, regulations and bylaws may be submitted to the district's legal counsel for review and recommendations.
6. The Superintendent or designee's office shall place the draft policy, administrative regulation or bylaw statement on the agenda of a public Board meeting for first reading.
7. The Board may return the drafts to the Superintendent or designee for further revision and/or move to give them a second reading and adoption.

Regulation PASO ROBLES PUBLIC SCHOOL

Board approved/reviewed Paso Robles, California

reviewed: October 28, 1997

---

**Bylaw 9312: ^Board Bylaws**

**Status:** DRAFT

**Original Adopted Date:** Pending

The Governing Board shall adopt Board bylaws to govern the internal operations of the Board. When the need for a new bylaw or modification of an existing bylaw is recognized, the Superintendent or designee shall draft a new or modified bylaw for consideration by the Board.

Bylaws may be adopted and amended by a majority vote of all members of the Board, following the same procedures as those used for the adoption or amendment of policy.

(cf. 9311 - Board Policies)

---

**Bylaw 9313: ^Administrative Regulations**

Status: DRAFT

Original Adopted Date: Pending

---

To carry out the intentions expressed in Governing Board policy, the Superintendent or designee shall develop administrative regulations and/or procedures specifying detailed actions to be taken and arrangements to be enforced within the district and its schools. Administrative regulations shall be consistent with state and federal law and regulations, Board policy, and negotiated employee contracts.

The Board shall review and approve administrative regulations as mandated by law. In addition, the Board may review and approve other regulations related to topics of particular interest to the Board or for which the Superintendent requests Board endorsement. The Board shall review proposed administrative regulations for the sole purpose of ensuring conformity with the intent of Board policy.

(cf. 2210 - Administrative Leeway in Absence of Governing Board Policy)

It is the Superintendent's responsibility to decide how to implement the Board's policies, and it is generally accepted that the Board should not be involved in this implementation. Board approval and adoption of administrative regulations is required only for regulations which the law mandates the Board to adopt. The Board's role with regard to other administrative regulations varies considerably from district to district.

Regulations and procedures shall be maintained at appropriate school and/or district locations and may be placed in the district's policy manual.

(cf. 9310 - Policy Manual)

---

**Bylaw 9314: ^Suspension Of Policies, Bylaws, Administrative Regulations**

**Status:** DRAFT

**Original Adopted Date:** Pending

Policies, bylaws and administrative regulations may be suspended for a specific purpose and limited time by majority vote.

(cf. 9322 - Agenda/Meeting Materials)

(cf. 9323.2 - Actions by the Board)

Suspension of any policy, bylaw or administrative regulation shall undergo the following consideration:

1. Policies, bylaws or administrative regulations shall be reviewed on their own merits rather than the circumstances of the moment.
2. The Governing Board shall decide whether the policy, bylaw or administrative regulation still reflects the intent of the Board and the law. If so, the suspension will be denied and the policy, bylaw or administrative regulation reaffirmed in the minutes.

**Superintendent's Authority**

The Superintendent may suspend all or part of any policy, bylaw or administrative regulation when it conflicts with state or federal law or regulations. The Superintendent shall report the suspension to the Board at the next regularly scheduled Board meeting. Suspension shall be valid until the policy, bylaw or administrative regulation is rescinded, amended or reaffirmed.

---

**Bylaw 9320: Meetings And Notices**

Status: ADOPTED

Original Adopted Date: 01/24/2012 | Last Revised Date: 07/16/2019 | Last Reviewed Date: 07/16/2019

Meetings of the Governing Board are conducted for the purpose of accomplishing district business.

A Board meeting exists whenever a majority of Board members gather at the same time and place to hear, discuss, or deliberate upon any item within the subject matter jurisdiction of the Board or district. (Government Code 54952.2)

In accordance with state open meeting laws, the Board shall hold its meetings in public and shall conduct closed sessions during these meetings only to discuss confidential matters specified by law. To encourage community involvement in the schools, meetings shall provide opportunities for questions and comments by members of the public and shall be conducted in accordance with law and Board-adopted bylaws.

Direct communication, personal intermediaries, and technological devices shall not be used by a majority of Board members to develop a collective concurrence as to an action that members will take on any item of district business. (Government Code 54952.2)

Meetings shall be held within district boundaries, except when otherwise allowed by law. (Government Code 54954)

Meetings shall be held in a facility that is accessible to all persons, including disabled persons, without charge. (Government Code 54961)

In order to help ensure participation in the meeting by disabled individuals, the Superintendent or designee shall provide appropriate disability-related accommodations or modifications upon request in accordance with the Americans with Disabilities Act. (Government Code 54953.2, 54954.1)

Meeting notices and agendas shall specify that an individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should contact the Superintendent or designee in writing.

**Regular Meetings**

The Board shall hold a regular meeting each month. Regular meetings shall be held at 6:00 p.m. on Tuesdays at the Paso Robles Joint Unified School District.

At least 5 days (120 hours) prior to a regular meeting, the agenda shall be posted at one or more locations freely accessible to members of the public. (Government Code 54954.2)

If a fire, flood, earthquake, or other emergency renders the regular meeting place unsafe, meetings shall be held for the duration of the emergency at a place designated by the president or designee, who shall so inform, by the most rapid available means of communication, all news media who have requested notice of special meetings. (Government Code 54954)

**Special Meetings**

Special meetings of the Board may be called by the presiding officer or a majority of the Board members. (Government Code 54956)

Written notice of special meetings shall be delivered personally or by any other means to all Board members and the local media who have requested such notice in writing. The notice shall be received at least 24 hours before the time of the meeting. The notice shall also be posted at least 24 hours before the meeting in a location freely accessible to the public. The notice shall specify the time and place of the meeting and the business to be transacted or discussed; no other business shall be considered at these meetings. (Education Code 35144; Government Code 54956)

Every notice of a special meeting shall provide an opportunity for members of the public to directly address the Board concerning any item that has been described in the meeting notice, before or after the item's consideration. (Government Code 54954.3)

Public notice shall be given at least 72 hours before any retreats, study sessions, or training sessions held by the Board. All such meetings shall be held within district boundaries and action items shall not be included.

## **Emergency Meetings**

In the case of an emergency situation for which prompt action is necessary due to the disruption or threatened disruption of public facilities, the Board may hold an emergency meeting without complying with the 24-hour notice or 24-hour posting requirement for special meetings pursuant to Government Code 54956. The Board shall comply with all other requirements for special meetings during an emergency meeting. (Government Code 54956.5)

An emergency situation means either of the following: (Government Code 54956.5)

1. A work stoppage, crippling activity, or other activity that severely impairs public health and/or safety as determined by a majority of the members of the Board
2. A dire emergency, which shall be defined as a crippling disaster, mass destruction, terrorist activity, or threatened terrorist act that poses peril so immediate and significant that requiring the Board to provide one-hour notice before holding an emergency meeting under this section may endanger the public health and/or safety as determined by a majority of the members of the Board.

Except in the case of a dire emergency, the Board president or designee shall give notice of the emergency meeting by telephone at least one hour before the meeting to the local media that have requested notice of special meetings. If telephone services are not functioning, the notice requirement of one hour is waived and, as soon after the meeting as possible, the Board shall notify those media representatives of the meeting and shall describe the purpose of the meeting and any action taken by the Board. (Government Code 54956.5)

In the case of a dire emergency, the Board president shall give such notice at or near the time he/she notifies the other members of the Board about the meeting. (Government Code 54956.5) The minutes of the meeting, a list of persons the Board president or designee notified or attempted to notify, a copy of the roll call vote, and any actions taken at the meeting shall be posted for at least 10 days in a public place as soon after the meeting as possible. (Government Code 54956.5)

## **Adjourned Meetings**

A majority vote by the Board may adjourn any meeting to a later time and place that shall be specified in the order of adjournment. (Government Code 54955)

If no Board members are present at any regular or adjourned regular meeting, the secretary or the clerk may declare the meeting adjourned to a later time and shall give notice in the same manner required for special meetings. (Government Code 54955)

A copy of the order or notice of adjournment shall be conspicuously posted on or near the door of the place where the meeting was held within 24 hours after the time of adjournment. (Government Code 54955)

## **Teleconferencing**

A teleconference is a meeting of the Board in which Board members are in different locations, connected by electronic means through audio and/or video. (Government Code 54953)

The Board may use teleconferences for all purposes in connection with any meeting within the Board's subject matter jurisdiction. All votes taken during a teleconference meeting shall be by roll call. (Government Code 54953)

During the teleconference, at least a quorum of the members of the Board shall participate from locations within district boundaries. (Government Code 54953)

Agendas shall be posted at all teleconference locations and shall list all teleconference locations whenever they are posted elsewhere. Additional teleconference locations may be provided to the public. (Government Code 54953)

All teleconferenced meetings shall be conducted in a manner that protects the statutory and constitutional rights of the parties or the public appearing before the Board, including the right of the public to address the Board directly at each teleconference location. (Government Code 54953)

All Board policies, administrative regulations, and bylaws shall apply equally to meetings that are teleconferenced. The Superintendent or designee shall facilitate public participation in the meeting at each teleconference location.

## Hearings

The Board may occasionally convene public hearings at which no Board action is to be taken. Such hearings are held solely to allow the Board and members of the public to receive information. A hearing may take place immediately prior to a Board meeting.

If a quorum of Board members is present at a hearing, notice of the hearing shall be provided according to the procedures specified above for regular meetings.

## Other Gatherings

Attendance by a majority of the Board members at any of the following events is not subject to state open meeting laws provided that a majority of the Board members do not discuss specific district business among themselves other than as part of the scheduled program: (Government Code 54952.2)

1. A conference or similar public gathering open to the public that involves a discussion of issues of general interest to the public or to school Boards
2. An open, publicized meeting organized by a person or organization other than the district to address a topic of local community concern
3. An open and noticed meeting of another body of the district or at a legislative body of another local agency
4. A purely social or ceremonial occasion
5. An open and noticed meeting of a standing committee of the Board, provided that the Board members who are not members of the standing committee attend only as observers

Individual contacts or conversations between a Board member and any other person are not subject to open meeting laws. (Government Code 54952.2)

---

---

**Exhibit 9320-E(1): Meetings And Notices**

Status: ADOPTED

Original Adopted Date: 09/16/2019

---

*See PDF on the next page.*

## Government Code 54954 Provisions Regarding Meetings Outside District Boundaries

Board meetings may be held outside district boundaries only to: (Government Code 54954)

1. Comply with state or federal law or court order or attend a judicial or administrative proceeding to which the district is a party
2. Inspect real or personal property which cannot conveniently be brought into the district, provided that the topic of the meeting is limited to items directly related to the property
3. Participate in meetings or discussions of multiagency significance, provided these meetings are held within one of the other agencies' boundaries, with all participating agencies giving the notice required by law
4. Meet in the closest meeting facility if the district has no meeting facility within its boundaries or if its principal office is located outside the district
5. Meet with elected or appointed state or federal officials when a local meeting would be impractical, solely to discuss legislative or regulatory issues affecting the district over which the state or federal officials have jurisdiction
6. Meet in or near a facility owned by the district but located outside the district, provided the meeting is limited to items directly related to that facility
7. Visit the office of the district's legal counsel for a closed session on pending litigation, when doing so would reduce legal fees or costs
8. Attend conferences on nonadversarial collective bargaining techniques
9. Interview residents of another district regarding the Board's potential employment of an applicant for Superintendent of the district
10. Interview a potential employee from another district

Exhibit PASO ROBLES PUBLIC SCHOOLS

Version: January 24, 2012 Paso Robles, California

**Bylaw 9321: Closed Session**

**Status:** ADOPTED

**Original Adopted Date:** 11/10/2020 | **Last Reviewed Date:** 11/10/2020

The Governing Board shall elect a president from among its members to provide leadership on behalf of the governance team and the educational community it serves.

To ensure that Board meetings are conducted in an efficient, transparent, and orderly manner, the president shall:

1. Call such meetings of the Board as he/she may deem necessary, giving notice as required by law
2. Consult with the Superintendent or designee on the preparation of Board meeting agendas
3. Call the meeting to order at the appointed time and preside over the meeting
4. Announce the business to come before the Board in its proper order
5. Enforce the Board's bylaws related to the conduct of meetings and help ensure compliance with applicable requirements of the Brown Act
6. Recognize persons who desire to speak, and protect the speaker who has the floor from disturbance or interference
7. Facilitate the Board's effective deliberation, ensuring that each Board member has an opportunity to participate in the deliberation and that the discussion remains focused
8. Rule on issues of parliamentary procedure
9. Put motions to a vote, and clearly state the results of the vote

The president shall have the same rights as other members of the Board, including the right to discuss and vote on all matters before the Board.

The president shall perform other duties in accordance with law and Board policy including, but not limited to:

1. Signing all instruments, acts, orders, and resolutions necessary to comply with legal requirements and carry out the will of the Board
2. Working with the Superintendent or designee to ensure that Board members have necessary materials and information
3. Subject to Board approval, appointing and dissolving all committees
4. In conjunction with the Superintendent or designee, representing the district as the Board's spokesperson in communications with the media
5. Leading the Board's advocacy efforts to build support within the local community and at the state and national levels

The president may participate in the California School Boards Association's Board President's Workshop and other professional development opportunities to enhance his/her leadership skills.

When the president resigns or is absent, the clerk shall perform the president's duties. When both the president and clerk are absent, the Board shall choose a president pro tempore to perform the president's duties.

---

---

**Bylaw 9321.1: ^Closed Session Actions And Reports**

Status: DRAFT

Original Adopted Date: Pending

---

No matters other than those announced in open session shall be acted upon during the closed session. (Government Code 54957.7)

(cf. 9321 - Closed Session Purposes and Agendas)

The Board shall reconvene in open session before adjourning and report closed session actions, the votes or abstentions thereon, and other disclosures required by Government Code 54957.1. These disclosures may be made at the location announced in the agenda for the closed session, as long as the public is allowed to be present at that location for the purpose of hearing them. (Government Code 54957.7)

**Personnel Matters**

The Board shall report any personnel action taken and the votes or abstentions thereon at the public meeting during which the closed session is held. This report shall identify the title of the position. However, the report of a dismissal or nonrenewal of an employment contract shall be deferred until the first public meeting after administrative remedies, if any, have been exhausted. (Government Code 54957.1)

(cf. 1312.1 - Complaints Concerning District Employees)

(cf. 2123 - Evaluation of the Superintendent)

(cf. 4118 - Suspension/Disciplinary Action)

(cf. 4218 - Dismissal/Suspension/Disciplinary Action)

**Negotiations/Collective Bargaining**

Final action on the proposed compensation of one or more unrepresented employees shall not be taken during the closed session. (Government Code 54957.6)

Approval of an agreement concluding closed session labor negotiations with represented employees shall be reported after the agreement is final and has been accepted or ratified by the other party. This report shall identify the item approved and the other party or parties to the negotiation. (Government Code 54957.1)

(cf. 4143/4243 - Negotiations/Consultation)

(cf. 4143.1/4243.1 - Public Notice - Personnel Negotiations)

**Student Matters**

Actions related to student matters shall be taken in open session and shall be a matter of public record. No information shall be released in violation of student privacy rights provided in law. (Education Code 35146, 48918)

In an expulsion action, the student's name and the cause for expulsion shall be listed on these public records only in response to a public request.

(cf. 5117 - Interdistrict Attendance)

(cf. 5119 - Students Expelled from Other Districts)

(cf. 5125 - Student Records)

(cf. 5125.3 - Challenging Student Records)

(cf. 5144 - Discipline)

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

**Real Estate Negotiations**

Approval of an agreement concluding real estate negotiations shall be reported after the agreement is final. If the

Board renders the agreement final, it shall report that approval, the votes or abstentions thereon, and the substance of the agreement in open session at the public meeting during which the closed session is held. If final approval rests with the other party, the Superintendent or designee shall disclose the fact of that approval and the substance of the agreement upon inquiry by any person, as soon as the other party or its agent has informed the district of its approval. (Government Code 54957.1)

#### Pending Litigation

The Board shall report the following actions related to pending litigation, and the votes or abstentions thereon, at the public meeting during which the closed session is held: (Government Code 54957.1)

1. Approval to legal counsel to defend, appeal or not appeal, or otherwise appear in litigation. This report shall identify the adverse parties, if known, and the substance of the litigation.
2. Approval to legal counsel to initiate or intervene in a lawsuit. This report shall state that directions to initiate or intervene in the action have been given and that details will be disclosed to inquiring parties after the lawsuit is commenced unless doing so would jeopardize the district's ability to serve process on unserved parties or its ability to conclude existing settlement negotiations to its advantage.
3. Acceptance of a signed offer from the other party or parties which finalizes the settlement of pending litigation. This report shall state the substance of the agreement.

If approval is given to legal counsel to settle pending litigation and if final approval rests with the other party or with the court, the district shall report the fact of approval, the substance of the agreement and the vote and abstentions thereon to persons who inquire once the settlement is final. (Government Code 54957.1)

#### JPA/Self-Insurance Claims

The Board shall report the disposition of joint powers authority or self-insurance claims and the votes or abstentions thereon at the public meeting during which the closed session is held. This report shall include the name of the claimant(s), the name of the agency claimed against, the substance of the claim and the monetary settlement agreed upon by the claimant. (Government Code 54957.1)

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

(cf. 3530 - Risk Management/Insurance)

#### Review of Assessment Instruments

At the public meeting during which the Board holds a closed session to review student assessment instruments, the Board

shall confirm that this review was made. Any actions related to the review shall be taken in open session without revealing any proprietary or confidential information and shall be a matter of public record.

---

**Bylaw 9322: Agenda/Meeting Materials**

Status: ADOPTED

Original Adopted Date: 09/23/2003 | Last Revised Date: 07/16/2019 | Last Reviewed Date: 07/16/2019

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

The agenda shall provide members of the public the opportunity to address the Board on any agenda item before or during the Board's consideration of the item. The agenda shall also provide members of the public an opportunity to testify at regular meetings on matters which are not on the agenda but which are within the subject matter jurisdiction of the Board. (Education Code 35145.5; Government Code 54954.3)

The agenda shall specify that an individual who requires disability-related accommodations or modifications including auxiliary aids and services in order to participate in the Board meeting should contact the Superintendent or designee in writing.

**Agenda Preparation**

The Superintendent, as Secretary to the Board, in consultation with the Board president, shall prepare the agenda for each regular and special meeting. A standing invitation shall be extended to the Board Clerk and to one other Board member who shall participate in rotation with the remaining five Board members. Rotation shall commence with the Board member to the left of the Board Clerk and proceed to the left for successive meetings.

The Board President, Board Clerk and one rotating Board member, shall meet with the Superintendent and members of the Cabinet, as appropriate, on the Tuesday prior to the week of the next Board meeting.

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

The Board President, in consultation with the Board Clerk and rotating Board member, along with the Superintendent shall decide whether a request is within the subject matter jurisdiction of the Board. Items not within the subject matter jurisdiction of the Board may not be placed on the agenda. If denied, a public explanation shall be communicated to the requestor within thirty days of the request by the Board Clerk at the next appropriate Board meeting. In addition, the Board president and Superintendent shall determine if the item is merely a request for information or whether the issue is covered by an existing policy or administrative regulation before placing the item on the agenda.

The Board President and Superintendent shall decide whether an agenda item is appropriate for discussion in open or closed session, and whether the item should be an action item, informational item or consent item.

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

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

**Consent Items**

In order to promote efficient meetings, the Board may act upon more than one item by a single vote through the use of a consent agenda. Consent items shall be items of a routine nature or items for which no Board discussion is anticipated and for which the Superintendent recommends approval.

In accordance with law, the public has a right to comment on any consent item. At the request of any member of the Board, any item on the consent agenda shall be removed and given individual consideration for action as a regular agenda item.

**Agenda Dissemination**

A copy of the agenda shall be forwarded to each Board member at least three days before each regular meeting, together with the Superintendent or designee's report; minutes to be approved; copies of communications; reports from committees, staff, citizens and others; and other available documents pertinent to the meeting.

When special meetings are called, the Superintendent and President shall make every effort to distribute the agenda and supporting materials to Board members as soon as possible.

Board members shall review agenda materials before each meeting. Individual members may confer directly with the Superintendent or designee to request additional information on agenda items.

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

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

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

Persons requesting mailing of the agenda or agenda packet shall pay an annual fee as determined by the Superintendent or designee.

---

**Bylaw 9323: Meeting Conduct**

Status: ADOPTED

Original Adopted Date: 10/28/1997

Meeting Procedures

All Governing Board meetings shall begin on time and shall be guided by an agenda prepared and delivered in advance to all Board members and to other persons upon request.

(cf. 9322 - Agenda/Meeting Materials)

The Board president shall conduct Board meetings in accordance with Board bylaws and procedures that enable the Board to efficiently consider issues and carry out the will of the majority.

(cf. 9121 - President)

The Board believes that late night meetings deter public participation, can affect the Board's decision-making ability, and can be a burden to staff. Regular Board meetings shall be adjourned at 10:30 p.m. (including closed session) unless extended to a specific time determined by a majority of the Board. The meeting shall be extended no more than once and may be adjourned to a later date.

(cf. 9320 - Meetings and Notices)

Quorum

A majority of the number of filled positions on the Board constitutes a quorum. (Education Code 5095, 35165)

Unless otherwise provided by law, affirmative votes by a majority of all the membership of the Board are required to approve any action under consideration, regardless of the number of members present. (Education Code 35164)

(cf. 9323.2 - Actions by the Board)

Abstentions

The Board believes that when no conflict of interest requires abstention, its members have a duty to vote on issues before them. When a member abstains, his/her abstention shall be considered to concur with the action taken by the majority of those who vote, whether affirmatively or negatively.

(cf. 9270 - Conflict of Interest)

Public Participation

Members of the public are encouraged to attend Board meetings and to address the Board concerning any item on the agenda or within the Board's jurisdiction. So as not to inhibit public participation, persons attending Board meetings shall not be requested to sign in, complete a questionnaire, or otherwise provide their name or other information as a condition of attending the meeting.

In order to conduct district business in an orderly and efficient manner, the Board requires that public presentations to the Board comply with the following procedures:

1. The Board shall give members of the public an opportunity to address the Board either before or during the Board's consideration of each item of business to be discussed at regular or special meetings. (Education Code 35145.5, Government Code 54954.3)
2. At a time so designated on the agenda, members of the public may bring before the Board, at a regular meeting, matters that are not listed on the agenda. The Board may refer such a matter to the Superintendent or designee or take it under advisement, but shall not take action at that time except as allowed by law. The matter may be placed on the agenda of a subsequent meeting for action or discussion by the Board. (Education Code 35145.5, Government Code 54954.2)
3. Without taking action, Board members or district staff members may briefly respond to statements made or questions posed by the public about items not appearing on the agenda. Additionally, on their own initiative or in response to questions posed by the public, a Board or staff member may ask a question for clarification, make a brief announcement, or make a brief report on his/her own activities. (Government Code 54954.2)

Furthermore, the Board or a Board member may provide a reference to staff or other resources for factual information, ask staff to report back to the Board at a subsequent meeting concerning any matter, or take action directing staff to place a matter of business on a future agenda. (Government Code 54954.2)

4. The Board need not allow the public to speak on any item that has already been considered by a committee composed exclusively of Board members at a public meeting where the public had the opportunity to address the committee on that item. However, if the Board determines that the item has been substantially changed since the committee heard it, the Board shall provide an opportunity for the public to speak. (Government Code 54954.3)

(cf. 9130 - Board Committees)

5. A person wishing to be heard by the Board shall first be recognized by the president and shall then proceed to comment as briefly as the subject permits.

Individual speakers shall be allowed three minutes to address the Board on each agenda or nonagenda item. The Board shall limit the total time for public input on each item to 20 minutes. With Board consent, the president may increase or decrease the time allowed for public presentation, depending on the topic and the number of persons wishing to be heard. The president may take a poll of speakers for or against a particular issue and may ask that additional persons speak only if they have something new to add.

6. The Board president may rule on the appropriateness of a topic. If the topic would be more suitably addressed at a later time, the president may indicate the time and place when it should be presented.

The Board shall not prohibit public criticism of its policies, procedures, programs, services, acts or omissions. (Government Code 54954.3) In addition, the Board may not prohibit public criticism of district employees.

Whenever a member of the public initiates specific complaints or charges against an employee, the Board president shall inform the complainant that in order to protect the employee's right to adequate notice before a hearing of such complaints and charges, and also to preserve the ability of the Board to legally consider the complaints or charges in any subsequent evaluation of the employee, it is the policy of the Board to hear such complaints or charges in closed session unless otherwise requested by the employee pursuant to Government Code 54957.

(cf. 1312.1 - Complaints Concerning District Employees)

(cf. 9321 - Closed Session Purposes and Agendas)

7. The Board president shall not permit any disturbance or willful interruption of Board meetings. Persistent disruption by an individual or group shall be grounds for the chair to terminate the privilege of addressing the Board. The Board may remove disruptive individuals and order the room cleared if necessary; in this case, members of the media not participating in the disturbance shall be allowed to remain, and individual(s) not participating in such disturbances may be allowed to remain at the discretion of the Board. When the room is ordered cleared due to a disturbance, further Board proceedings shall concern only matters appearing on the agenda. (Government Code 54957.9)

(cf. 9324 - Minutes and Recordings)

Recording by the Public

If the Board finds that noise, illumination or obstruction of view related to these activities would persistently disrupt the proceedings, these activities shall be discontinued or restricted as determined by the Board. (Government Code 54953.5, 54953.6)

---

**Bylaw 9323.2: Actions By The Board**

Status: ADOPTED

Original Adopted Date: 09/27/2011

The Governing Board shall act by a majority vote of all of the membership constituting the Board, unless otherwise required by law. (Education Code 35164)

An "action" by the Board means: (Government Code 54952.6)

1. A collective decision by a majority of the Board members
2. A collective commitment or promise by a majority of the members to make a positive or negative decision
3. A vote by a majority of the members when sitting as the Board upon a motion, proposal, resolution, order, or ordinance

The Board shall not take action by secret ballot, whether preliminary or final. (Government Code 54953)

Actions taken by the Board in open session shall be recorded in the Board minutes. (Education Code 35145)

(cf. 9324 - Minutes and Recordings)

**Action on Non-Agenda Items**

After publicly identifying the item, the Board may take action on a subject not appearing on the posted meeting agenda under any of the following conditions: (Government Code 54954.2)

1. When a majority of the Board determines that an emergency situation exists, as defined for emergency meetings pursuant to Government Code 54956.5
2. When two-thirds of the members present, or if less than two-thirds of the members are present then by a unanimous vote of all members present, determine that the need to take immediate action came to the district's attention after the agenda was posted
3. When an item appeared on the agenda of, and was continued from, a meeting that occurred not more than five days earlier

(cf. 9320 - Meetings and Notices)

(cf. 9322 - Agenda/Meeting Materials)

**Challenging Board Actions**

Any interested person or the district attorney's office may present a demand that the Board cure and correct a Board action which he/she alleges is in violation of Government Code 54954.2 (agenda posting), Government Code 54953 (open meeting and teleconferencing), Government Code 54954.5 (closed session item descriptions), Government Code 54954.6 (new or increased tax assessments), Government Code 54956 (special meetings), or Government Code 54956.5 (emergency meetings). (Government Code 54960.1)

Any demand to "cure and correct" an alleged violation shall clearly describe the challenged action and the nature of the alleged violation and shall be presented to the Board in writing within 90 days of the date when the action was taken. If the alleged violation concerns action taken in an open session but in violation of Government Code 54954.2 (agenda posting), the written demand must be made within 30 days of the date when the alleged action took place. (Government Code 54960.1)

Within 30 days of receiving the demand, the Board shall do one of the following: (Government Code 54960.1)

1. Cure or correct the challenged action and inform the demanding party in writing of its actions to cure or correct.
2. Determine not to cure or correct the alleged violation and inform the demanding party in writing of its decision to not cure or correct.
3. Take no action. If the Board takes no action within the 30-day review period, its inaction shall be considered a decision not to cure or correct the action.

---

**Exhibit 9323.2-E(1): Actions By The Board**

**Status:** ADOPTED

**Original Adopted Date:** 08/19/2008

---

*See PDF on the next page.*

## ACTIONS REQUIRING MORE THAN A MAJORITY VOTE

### Actions Requiring a Two-Thirds Vote of the Board:

1. Resolution declaring intention to sell or lease real property (Education Code 17466)

(cf. 3280 - Sale or Lease of District-Owned Real Property)

2. Resolution declaring intent of Governing Board to convey or dedicate property to the state or any political subdivision for the purposes specified in Education Code 17556 (Education Code 17557)

3. Resolution authorizing and directing the Board president, or any other presiding officer, secretary, or member, to execute a deed of dedication or conveyance of property to the state or a political subdivision (Education Code 17559)

4. Lease for up to three months of school property which has a residence on it and which cannot be developed for district purposes because funds are unavailable (Education Code 17481)

5. Temporary borrowing before receipt of fiscal income, if implemented pursuant to Government Code 53820-53833 (Government Code 53821)

6. Upon complying with Government Code 65352.2 and Public Resources Code 21151.2, ordering city or county zoning ordinances inapplicable to a proposed use of the property by the district (Government Code 53094)

(cf. 7131 - Relations with Local Agencies)

(cf. 7150 - Site Selection and Development)

(cf. 7160 - Charter School Facilities)

7. Resolution to transfer excess local funds from a deferred maintenance fund when state funds are insufficient to match local funds being held in the deferred maintenance fund (Education Code 17582, 17583)

8. For districts with an ADA of 2,500 or less seeking to add a community day school on an existing school site, certification that satisfactory alternative facilities are not available for a community day school (Education Code 48661)

9. For K-8 districts (and no higher grades) seeking to add a community day school on an existing school site, certification that satisfactory alternative facilities are not available for a community day school (Education Code 48661)

10. For districts desiring to operate a community day school on an existing school site to serve grades K-6 (and no higher grades), certification that satisfactory alternative facilities are not available for a community day school (Education Code 48661)

(cf. 6185 - Community Day School)

11. Resolution of intent to issue general obligation bonds with the approval of 55 percent of the voters of the district (Education Code 15266)

(cf. 7214 - General Obligation Bonds)

12. Resolution of intent to issue bonds within a school facilities improvement district with the approval of 55 percent of the voters of the school facilities improvement district (Education Code 15266)

(cf. 7213 - School Facilities Improvement Districts)

13. Resolution to place a parcel tax on the ballot (Government Code 53724)

14. Resolution of necessity to proceed with an eminent domain action and, if the Board desires to use the property for a different use than stated in the resolution of necessity, a subsequent resolution so authorizing the different use (Code of Civil Procedure 1245.240, 1245.245)

Actions Requiring a Two-Thirds Vote of the Board Members Present at the Meeting:

1. Determination that there is a need to take immediate action and that the need for action came to the district's attention after the posting of the agenda. If less than two-thirds of the Board members are present at the meeting, a unanimous vote of all members present is required. (Government Code 54954.2)

2. Determination that a closed session is necessary during an emergency meeting. If less than two-thirds of the Board members are present, a unanimous vote of all members present is required. (Government Code 54956.5)

(cf. 9320 - Meetings and Notices)

(cf. 9321 - Closed Session Purposes and Agendas)

Actions Requiring a Four-Fifths Vote of the Board:

1. The expenditure and transfer of necessary funds and use of district property or personnel to meet a national or local emergency created by war, military, naval, or air attack, or sabotage, or to provide for adequate national or local defense (Government Code 53790-53792)

(cf. 3110 - Transfer of Funds)

2. Resolution, adopted between July 15 and August 30, to borrow funds of up to 25 percent of the estimated income and revenue to be received by the district during the current fiscal year from apportionments based on average daily attendance for the preceding school year (Government Code 53822-53824)

3. Declaration of an emergency in order to authorize the district to include a particular brand name or product in a bid specification (Public Contract Code 3400)

(cf. 3311 - Bids)

Actions Requiring a Unanimous Vote of the Board:

1. Resolution authorizing and prescribing the terms of a community lease for extraction of gas (Education Code 17510-17511)

2. Waiver of the competitive bid process pursuant to Public Contract Code 20111 when the Board determines that an emergency exists and upon approval of the County Superintendent of Schools (Public Contract Code 20113)

Action Requiring a Unanimous Vote of the Board Members Present at the Meeting:

1. Private sale of surplus property without advertisement in order to establish that such property is not worth more than \$2,500. Disposal of surplus property in the local dump or donation to a charitable organization requires the unanimous vote of the Board members present to establish that the value of such property would not defray the cost of arranging its sale. (Education Code 17546)

(cf. 3270 - Sale and Disposal of Books, Equipment and Supplies)

**Bylaw 9324: Minutes And Recordings**

**Status:** ADOPTED

**Original Adopted Date:** 10/28/1997

The secretary or designee of the Governing Board shall keep minutes and record all official Board actions. (Education Code 35145, 35163)

(cf. 9323.2 - Actions by the Board)

The minutes of Board meetings shall contain the following information:

1. The time when the meeting is called to order and when adjourned
2. Members present and absent
3. The time of arrival and/or departure of Board members when a meeting is in progress
4. The time each item is introduced for consideration
5. Notation by title of each item considered by the Board
6. Notation of staff member responsible for the agenda item
7. Wording of any motion made for Board approval, and the name of the member making the motion and the name of the seconder of the motion
8. Record of how each member voted on each motion, except when the vote is unanimous and whether the motion passed or failed
9. Names of people who address the Board on an item of business, or who address the Board under "other parties wishing to address the Board"
10. Other items as may be directed by the Board

The main purpose of the minutes is to record official action taken by the Board and how each Board member voted. The minutes are not intended to be a verbatim record of the meeting.

Copies of the minutes of each regular or special meeting shall be distributed to all Board members with the agenda for the next regular meeting, except in extenuating circumstances.

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

(cf. 1340 - Access to District Records)

(cf. 9321.1 - Closed Session Actions and Reports)

Official Board minutes and recordings shall be stored in a fire-proof location.

**Recording of Votes**

Motions or resolutions shall be recorded as having passed or failed. Individual votes shall be recorded unless the action was unanimous. All motions and Board resolutions shall be numbered consecutively from the beginning of each fiscal year.

A roll call vote shall be taken when the Board is taking action on an official resolution which provides for individual Board member names. Roll call votes may be called for by the presiding officer of the Board for reasons of clarification and/or accuracy.

**Audio Recording**

An audio tape recording may be made at any Board meeting. The presiding officer shall announce that a recording is being made at the beginning of the meeting, and the location of the recorder shall be noted. The audio recording of the Board meeting is primarily for the purpose of providing individual Board members with a resource to review a

meeting from which that Board member is absent. The audio recording is not to be considered as the official record or minutes of a meeting.

Recordings made during regular or special Board meetings are public records. They shall be kept for at least 30 days and upon request shall be made available for inspection by members of the public on a district recorder without charge. An appropriate charge will be made for duplicating audio tapes in accordance with legal requirements.

---

---

**Bylaw 9400: Board Self-Evaluation**

**Status:** ADOPTED

**Original Adopted Date:** 10/28/1997

---

Effective and efficient Governing Board operations are an integral part of creating a successful educational program. In order to measure progress towards its stated goals and objectives, the Board will annually schedule a time and place at which all its members may participate in a formal self-evaluation.

The Board shall be evaluated as a whole and not as individuals. The evaluation will focus on the internal operations and performance of the Board. The Board members shall develop goals and objectives against which the Board will be evaluated. A self-evaluation instrument will be based on these goals and objectives and not on goals set for the district.

Each Board member will complete a self-evaluation instrument independently. The ensuing evaluation will be based on the resulting composite picture of Board strengths and weaknesses. The Board will discuss the tabulated results as a group.

The evaluation process should include the establishment of strategies for improving Board performance. Revised priorities and new goals will be set for the following year's evaluation.

The Board may invite the Superintendent or others to participate in the evaluation and suggest specific criteria to measure Board success as a governing body.

The Board recognizes that adequate opportunities for Board member orientation and inservice are an essential component of conducting meaningful self-evaluation. The evaluation process shall include suggestions for continued Board member development.

(cf. 9240 - Board Development)

Bylaw PASO ROBLES PUBLIC SCHOOL

adopted: October 28, 1997 Paso Robles, California

---



School Business and  
Finance in California

**WHAT EVERY BOARD  
MEMBER AND CANDIDATE  
SHOULD KNOW**



*The foremost authority on school business.*

# Foreword

Dear Leaders,

California's school finance system – which fuels the learning and developmental opportunities that our state's 6.2 million public school students receive – is driven largely by the important decisions made by elected local and state leaders. The California Association of School Business Officials (CASBO) has developed this guide to provide essential information about school finance and business to inform this decision-making. The guide is divided into four sections that describe:

- **How (and how well)** California public schools are funded
- **The new era of LCFF:** California's student-centered funding formula
- **Critical issues** in school finance and business, and
- **Basics** of local school district budgets

As you consider the current school finance landscape, some important realities to keep in mind include:

- While overall funding for schools provided by the state has bounced back from the depths of the Great Recession, **the state's overall investment continues to lag behind both the national per-student average and levels that researchers indicate are necessary to ensure all students can meet the state's high academic standards.**
- Despite recent increases in state education funding, **local school districts throughout California face significant fiscal pressures that threaten to destabilize their budgets and force reductions in services to students.** This is due to rising costs, including pension obligations mandated by the state, that absorb a significant amount of available funding.
- The Local Control Funding Formula (LCFF), signed into law in 2013, has made important changes. It allocates funding based on students' needs and promotes greater transparency, local flexibility and stakeholder engagement in planning and decision-making. **While the LCFF determines how state funds are allocated to local districts and county offices of education, the state's Proposition 98 formula still largely determines how much overall state funding goes out to schools.**

- **California continues to serve the most diverse student population in the country**, including approximately one-fourth of all students who live in poverty, one-fifth who are English learners, and one-tenth who have disabilities that affect their ability to learn. At the same time, the state faces a severe shortage of qualified teachers for many subjects and classrooms, as well as a shortage of school leaders.

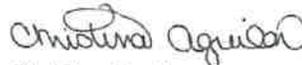
We encourage you to gain a deeper understanding of these and many other issues that shape school funding and business in California. While sometimes less visible, they are crucial to supporting the success of our students every day in all of our classrooms.

CASBO is happy to serve as a resource for you. Founded in 1928, CASBO supports public schools by providing professional development and creating opportunities for collaboration in every facet of school business management and operations to school districts, county offices of education and more than 23,000 individual school business officials statewide. Our work is based on the fundamental principle that **public education is the foundation of a healthy democracy and thriving economy.**

California's 6.2 million public school students are CASBO's essential priority; therefore, we work to ensure that California public schools can educate our students in safe and healthy environments with appropriate educational resources so that they may become productive members of society.

Please do not hesitate to contact our office at **916-447-3783**, or visit our website at [casbo.org](http://casbo.org).

Sincerely,



Christina Aguilar  
PRESIDENT



Molly McGee-Hewitt  
CEO & EXECUTIVE DIRECTOR

# Contents

<b>1: How (and How Well) are California Public Schools Funded?</b> . . . . .	1
<i>What are the main sources of funding for public schools?</i> . . . . .	1
<i>How is the state's total allocation to schools determined? And how stable is the state's funding?</i> . . . . .	1
<i>What determines how much funding each individual school district, county office of education or charter school receives?</i> . . . . .	1
<i>How much state funding do schools receive in total?</i> . . . . .	2
<i>How much on average does California spend per student? How does this compare to other states?</i> . . . . .	2
<i>What percentage of California's taxable income is spent on education?</i> . . . . .	3
<i>How much funding does California receive from the federal government?</i> . . . . .	3
<i>What about the California State Lottery – how much funding do schools actually get?</i> . . . . .	4
<i>How are the costs for building new school facilities or modernizing existing ones paid for?</i> . . . . .	4
<i>What is the state's overall estimated school facilities need?</i> . . . . .	4
<b>2: The LCFF Era: California's Student-Centered Funding Formula</b> . . . . .	5
<i>What is the Local Control Funding Formula (LCFF), and what does it mean for local education agencies?</i> . . . . .	5
<i>Do all school districts receive the same amount of funding through the LCFF?</i> . . . . .	5
<i>How much flexibility do school districts actually have to spend the funds they receive from the state?</i> . . . . .	5
<i>What is a Local Control and Accountability Plan?</i> . . . . .	6
<b>3: Current Issues in School Finance and Business</b> . . . . .	7
<i>As part of this year's state budget, it was reported that the Local Control Funding Formula (LCFF) is now "fully funded." What does this really mean?</i> . . . . .	7
<i>A term that some people are starting to use to describe current levels of school funding and the predicament school districts face is a "silent recession." What does this mean?</i> . . . . .	7
<i>Just how significant is the impact of rising state pension costs on school district budgets?</i> . . . . .	7
<i>What about the impact of rising expenses for serving Students With Disabilities?</i> . . . . .	8
<b>4: Basics of Local School District Budgets</b> . . . . .	10
<i>What exactly is a school district budget, and on what is it based?</i> . . . . .	10
<i>What are the main expenditures in school district budgets?</i> . . . . .	10
<i>What factors impact a local budget? What are the main challenges for school districts in balancing budgets and maximizing the amounts available for student support and services?</i> . . . . .	11
<i>Who oversees local school district budgets?</i> . . . . .	11
<i>What are the three major "certifications" of a district budget?</i> . . . . .	11
<i>Can local districts raise additional revenues?</i> . . . . .	11
<b>About CASBO</b> . . . . .	12
<b>Acknowledgments</b> . . . . .	12

# 1

## How (and How Well) Are California Public Schools Funded?

### What are the main sources of funding for local schools?

Local, state and federal dollars support the 6.2 million students in California’s K–12 public schools. Since 1978, by far the largest source of general operating funding for schools comes from the state budget General Fund. That’s a significant change from the years before that, when most school funding came from local property tax revenues.

Funding from the state typically flows to what are called Local Education Agencies (LEAs), which are school districts, county offices of education and most charter schools. These LEAs also then allocate funds for individual schools and services.



Source: California Legislative Analyst Office

<sup>1</sup> The “local and miscellaneous” slice is generated and controlled by local school districts and includes such items as interest income, leases on unused properties, parcel tax proceeds and donations.

### How is the state’s total allocation to schools determined? And how stable is the state’s funding?

**Proposition 98**, passed by voters in 1998, continues to drive how much overall funding the state sends to our K–12 schools and community colleges each year.

Proposition 98 uses a complex formula to set a minimum level for funding (about 40 percent of state revenues) that ideally grows with the economy. However, when the state’s overall tax revenue growth is low, education funding can be reduced – with the understanding that it will be restored when revenues rebound. (With a two-thirds vote, the Legislature also may take the extreme action of suspending the Proposition 98 funding requirement.)

Instead of serving as a minimum, Proposition 98 has most often been treated as a maximum by the legislature, which has rarely allocated more than the required minimum amount to schools.

Additionally, the state budget’s heavy reliance on income tax, as opposed to property tax revenues to support schools increases potential volatility. Property values (and therefore property tax receipts) tend to vary moderately with economic cycles, as opposed to income tax receipts, which are fully exposed to the booms and busts of the stock market.<sup>2</sup>

### What determines how much funding each individual school district, county office of education or charter school receives?

The amount is set mainly through a calculation called the **Local Control Funding Formula (LCFF)** – a groundbreaking state law approved in 2013.

<sup>2</sup> [Ed100.org](http://Ed100.org)

The LCFF takes into consideration the additional costs to educate students based on their needs, such as foster and homeless youth, English learners, and students from low-income families.

The LCFF provides districts with greater flexibility for spending their funding, and also requires districts to engage their communities in developing Local Control and Accountability Plans (LCAPs). We'll explain more about these aspects in the LCFF section of this guide.

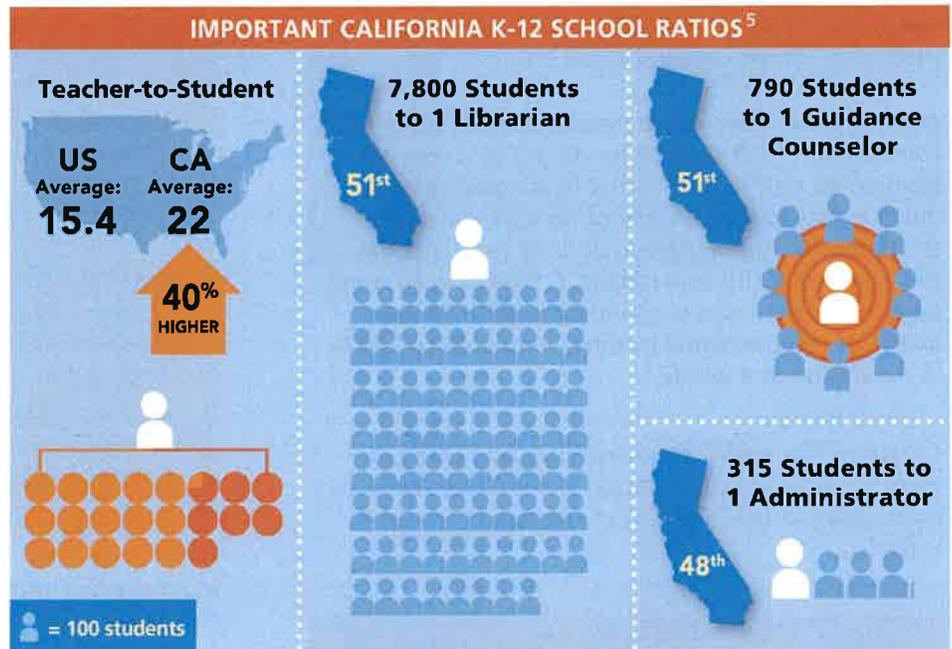
*How much state funding do schools receive in total?*

In 2017-18, Proposition 98 funding totaled \$75.2 billion. Of that, K–12 education received \$65.3 billion, community colleges received \$8.6 billion, and preschool received \$1.1 billion.

Keep in mind that California serves by far the largest student population of any state – more than 6 million students, including about six out of every 10 who are from low-income families, one in five who is an English learner, and one in 10 who has a disability affecting his/her education.<sup>3</sup>

*How much on average does California spend per student? How does this compare to other states?*

The most current state-to-state education spending comparisons are from 2015-16. In that fiscal year, **California ranked 41<sup>st</sup> among all states in spending per K–12 student after adjusting for differences in the cost of living in each state.**<sup>4</sup> California spent \$10,291 per K–12 student – about \$1,900 less than the \$12,252



per student average spent by the nation as a whole.<sup>6</sup> California's spending per student in 2015-16 was about \$2,000 higher than it had been in 2012-13, at which point California ranked 50<sup>th</sup> in the nation. Even with increases in recent state budgets, California's per-student spending is still below the national average from several years earlier, and far below the top-spending states, which allocate in excess of \$20,000 per student.

A new study conducted by the American Institute for Research as part of the "Getting Down to Facts II" project in 2018 estimated that California would have needed to spend an additional \$25.6 billion (over a third more than 2016-17 levels) to ensure all students have an opportunity to meet the state's educational goals.<sup>7</sup>

<sup>3</sup> Legislative Analyst's Office, 2018 – [lao.ca.gov/Publications/Report/3736](http://lao.ca.gov/Publications/Report/3736)

<sup>4</sup> *California's Support for K–12 Education is Improving, but Still Lagging*, California Budget and Policy Center Fact Sheet, January 2017; [www.calbudgetcenter.org/resource/californias-support-k-12-education-improving-still-lags-nation/](http://www.calbudgetcenter.org/resource/californias-support-k-12-education-improving-still-lags-nation/). Also, EdSource has noted that states' rankings of per-student spending can vary by studies. In addition to the California Budget and Policy Center rankings, other frequently cited rankings are calculated by EdWeek and the National Education Association. See

"How does California rank in school spending? It all depends," EdSource, February 8, 2017 – [edsources.org/2017/how-does-california-rank-in-per-pupil-spending-it-all-depends/577405](http://edsources.org/2017/how-does-california-rank-in-per-pupil-spending-it-all-depends/577405).

<sup>5</sup> California Budget and Policy Center, ranking based on 2012-13 fiscal year, the most recent year that data was available.

<sup>6</sup> California Budget and Policy Center

<sup>7</sup> "Getting Down to Facts II: What does it cost to educate California's students? A professional judgment approach" – [www.gettingdowntofacts.com/publications/what-does-it-cost-educate-californias-students-professional-judgment-approach](http://www.gettingdowntofacts.com/publications/what-does-it-cost-educate-californias-students-professional-judgment-approach), (Based on 2016-17 funding levels that were analyzed in the study.)

### *What percentage of Californians' taxable income is spent on education?*

Another insightful way to measure a state's overall commitment to education funding is by a concept economists call "effort" – that is, comparing how much a state spends on schools as a percentage of the personal income earned by state residents.<sup>8</sup> By this measure, California ranked 37<sup>th</sup> among all states. California's K–12 school spending in 2015-16 was 3.29% of state personal income, compared to 3.78% in the nation as a whole.<sup>9</sup>

**California's K–12 spending in 2015-16 was 3.29% of total state personal income, compared to 3.78% for the nation as a whole...**

### FUNDING MATTERS

A recently conducted review of research by the Learning Policy Institute on the role of money in determining school quality found that: "Improvements in the adequacy and equity of per-pupil spending are positively associated with improved student outcomes. While there are other factors that moderate the influence of funding on student outcomes, such as how that money is spent, the association of higher spending with better student outcomes holds true, on average, in numerous large-scale studies across multiple contexts. The size of this effect is larger in some studies than in others; and in some cases, additional funding appears to matter more for some students than for others – in particular, students from low-income families who have access to fewer resources outside of school. Clearly, money must be spent wisely to yield benefits. But on balance, in direct tests of the relationship between financial resources and student outcomes, money matters."

Source: "How Money Matters for Schools," by Bruce Baker, Learning Policy Institute, [learningpolicyinstitute.org/product/how-money-matters-report](http://learningpolicyinstitute.org/product/how-money-matters-report)

<sup>8</sup> EdSource

<sup>9</sup> California Budget and Policy Center, [calbudgetcenter.org/resources/californias-support-K-12-education-improving-still-lags-nation/](http://calbudgetcenter.org/resources/californias-support-K-12-education-improving-still-lags-nation/)

### GOING DEEPER

For additional research about several school finance related topics, be sure to consult the new **Getting Down to Facts II** project conducted by Stanford University and Policy Analysis for California Education (PACE). This provides in-depth analysis of California's education system as of 2018. Research briefs and technical reports can be viewed at [www.gettingdowntofacts.com/research-briefs](http://www.gettingdowntofacts.com/research-briefs).



### *How much funding does California receive from the federal government?*

California received \$7.6 billion for K–12 education in 2016-17 from the federal budget (about 9 percent of the state's total revenues for schools). The largest portion of these funds flows to schools with high concentrations of low-income students, known as Title I schools. States that accept federal dollars must comply with federal requirements, most significantly as stipulated in the **Every Student Succeeds Act (ESSA)**. Additionally, federal funds go toward supporting districts in serving students with disabilities, English learners, schools impacted by military bases and other facilities, and for improving teacher quality. Federal funds also support related services for early learning and afterschool programs.



For extremely useful infographics, see "States in Motion: Visualizing how education funding has changed over time," produced by EdSource – [edsource.org/2015/states-in-motion-school-finance-naep-child-poverty/83303](http://edsource.org/2015/states-in-motion-school-finance-naep-child-poverty/83303)

### *What about the California State Lottery – how much funding do schools actually receive from it?*

For most of the past decade, the state lottery has provided slightly more than 1 percent of total school funding, with 2 percent the high mark. In 2015-16, schools received a total of about \$1.1 billion in K–12 funding, or about \$140 per student in funds to be used for any purpose, plus \$40 per student specifically for textbook purchases. (The cost for a typical textbook may exceed \$150.)

### *How are the costs for building new school facilities or modernizing existing ones paid for?*

Both the state and local school districts issue bonds to pay for school facilities.

The state's **School Facility Program** provides grants to school districts that cover half the cost of new construction projects and a larger share for modernization. In November 2016, California voters passed Proposition 51, the first statewide school bond measure since 2006. It authorized \$7 billion in new general obligation bonds for public school facilities (and \$2 billion for community college facilities). The state makes debt service payments using non-Proposition 98 General Fund monies to repay these bonds.

Local communities also contribute to building and modernizing school facilities. **In 2016, Californians across the state voted on 205 local school bond measures, of which 94 percent passed.** In total, more than \$18.8 billion in local bonds for K–12 facilities was approved. From 2004 to 2016, local school districts proposed 1,018 bond initiatives and voters passed 83 percent of them, for a total of \$91.1 billion in local funding. These bonds are repaid through local property tax surcharges.

While public support for local school bonds has remained consistently high, it is important to note that districts which are not able to pass bonds have significant unmet facilities needs. Moreover, even districts that have passed bonds may struggle to accomplish their facilities goals and provide equal opportunities for students because bonding capacity is tied to the value of properties in the district.

### *What is the state's overall estimated school facilities need?*

According to the Public Policy Institute of California, California's public schools serve more than 6 million students at 10,000-plus schools in more than 300,000 classrooms – 70 percent of which are more than 25 years old. By 2022, schools statewide are projected to need about \$117 billion for facilities. About 69 percent of that amount is needed for school maintenance and modernization – updating science labs and adding computers, for example – while only 10 percent is needed to keep pace with enrollment or address overcrowding.<sup>10</sup>

#### COMMUNITY FUNDED LOCAL SCHOOL DISTRICTS

Some school districts – about 10 percent of the 1,000 districts in California – are funded primarily through local property taxes, rather than state funds. These are called **Community Funded** or **Locally Funded** School Districts (sometimes also known as “Basic Aid” districts.) Here's how they work: Once the state calculates the annual allocation for school districts using the Local Control Funding Formula, local property taxes first are counted toward meeting that allocation, then the state makes up the rest from the State General Fund. However, some districts' local property tax revenues are sufficient to meet their total LCFF amount. These districts keep all of their local property tax revenues for education purposes. From the state they receive only the minimum Basic Aid funding required by the State Constitution – \$120 per student – or as guaranteed through the Minimum State Aid provision of the LCFF. Community funded districts are found throughout the state and have student populations that vary. There are historically more community funded districts when education funding is being cut by the state and fewer when the state sets higher funding levels for education.

Source: School Services of California, Inc..

<sup>10</sup> PPIC, [www.ppic.org/publication/bonds-for-k-12-school-facilities-in-california/](http://www.ppic.org/publication/bonds-for-k-12-school-facilities-in-california/)

## 2

## The LCFF Era: California's Student-Centered Funding Formula

### *What is the Local Control Funding Formula (LCFF), and what does it mean for local education agencies?*

LCFF is a student-centered formula in state law that determines how the majority of state funds will be sent to local school districts, county offices of education and charter schools. LCFF advances the principle of equity by recognizing the different needs of students. Early research shows promising signs that California's approach of targeting funds based on students with higher needs through the LCFF can reduce racial and economic disparities in graduation rates and math achievement.<sup>11</sup>

### *Do all school districts receive the same amount of funding through the LCFF?*

Districts receive the same amount of funding per

student as part of the Base Grant, but they receive different levels of funding depending on how many English learners, children in poverty, and foster and homeless youth they serve.

The LCFF's differentiated funding reflects the state's fundamental commitment to equity by allocating funding for students based on their differing needs. Total funding amounts also may differ between neighboring districts due to local revenue sources particular to those districts.

### *How much flexibility do school districts actually have to spend the funds they receive from the state?*

A central philosophy behind the LCFF is that local educators, leaders and their communities know best how to address the needs of their students.

#### HOW LCFF WORKS

All districts receive a **BASE GRANT** for each student. The base grant is larger for grades 9-12 than for other grade levels.



Districts receive a 20% additional **SUPPLEMENTAL GRANT** per student for students with higher needs – identified as children living in poverty, English learners, and foster and homeless youth. It's important to note that districts are eligible to receive extra funding only once per student, regardless of whether a student may fall into multiple high-needs categories. This is referred to as the "unduplicated" student count. Also, no additional LCFF grant funding is provided for students with other needs, such as those with disabilities that impact their ability to learn.



If more than 55% of children in the district are higher needs, the district receives an extra 50% of the base grant for each student beyond the 55% threshold. This is called a **CONCENTRATION GRANT**. These grants recognize that it costs school districts more to effectively address the challenges of high-needs students concentrated in high-poverty communities.



<sup>11</sup> UC Berkeley and Learning Policy Institute Study, [www.learningpolicyinstitute.org/product/ca-school-finance-reform-brief](http://www.learningpolicyinstitute.org/product/ca-school-finance-reform-brief)

As opposed to the prior funding system in which funds were allocated to districts with restrictions set by the state for how they could be used and intensive compliance reporting requirements documenting their use (often referred to as the old system of “**categorical programs**”), districts have greater flexibility through the LCFF to decide how to spend their funds.



That being said, **the amount of actual, discretionary money available from year to year can still be very limited.** The Base Grant must primarily support core expenses for teacher and staff salaries, and health benefits, which account for the largest percentage of school expenses. Fixed costs for items such as utilities and maintenance must also be factored in. Additionally, the state has steadily increased the obligation of districts to fund retirement and pension costs. Fiscal pressure against the Base Grant is extreme and is increasing faster than the growth in school districts’ annual revenues.

*What is a Local Control and Accountability Plan?*

As part of LCFF, school districts and charter schools must adopt a **Local Control and Accountability Plan (LCAP)**. In creating this plan, districts must consult with teachers, principals, administrators, other school staff and local bargaining units. They are also required to engage with parents and students when developing their LCAPs, including seeking advice from a parent advisory committee and an English learner parent advisory committee. There must also be at least two public meetings where the LCAP is shared, along with the formal budget. Many districts throughout the state have already pushed far beyond these minimum requirements to facilitate more

**CALIFORNIA’S EDUCATIONAL PRIORITIES**

LCFF establishes eight priority areas for school districts and charter schools (and two additional ones for county offices of education) that, along with the new California School Dashboard, serve as the foundation for how the state defines success and measures the progress of students and schools. These priority areas also are intended to guide local planning and funding decisions. They are:

- Basic Conditions of Learning
- Effective Implementation of Academic Content and Performance Standards
- Parental Involvement
- Student Achievement
- Student Engagement
- School Climate
- Access to, and Enrollment in, a Broad Course of Study
- Other Student Outcomes

dialogue and collaboration among all of their stakeholders.

LCAPs are required to be updated annually and approved by the county superintendent of schools in coordination with the approval of the district budget. Based on a template developed by the State Board of Education, each LCAP must identify goals and strategies to achieve those goals in each of the state-identified priority areas, as well as locally determined priorities. LCAPs also must describe how districts plan to utilize additional funding targeted for students with higher needs to increase or improve services for those students and close achievement and opportunity gaps.



## 3

## Current Issues in School Finance and Business

*As part of this year's state budget, it was reported that the Local Control Funding Formula (LCFF) is now "fully funded." What does this really mean?*

This means that, with the 2018-19 state budget, funding levels have now met an initial target that was set by the legislature when the LCFF was enacted in 2013 – a target aimed essentially at restoring school funding to pre-Recession levels. This target was not tied to the amount of resources schools actually need to provide services to all students.

Meeting this implementation target for the LCFF is a significant development, as it reflects nearly \$20 billion of increased funding to K–12 schools over the past six years. However, as the California Budget and Policy Center notes, "Achieving this LCFF funding goal was never intended to mean that an adequate level of financial support needed to deliver a quality education for California's K–12 students had been provided."<sup>12</sup> **California's schools should not be regarded as "fully funded."** A chasm remains between current funding levels and what is actually needed to ensure success for all students – or even to bring the state to average per-student levels of spending among all states.

*A term that some people are starting to use to describe current levels of school funding and the predicament school districts face is a "silent recession." What does this mean?*

A "silent recession" refers to the building and severe financial pressure that face many local school districts.

As the research organization WestEd has noted: "Despite projected increases in state and local education funding between 2017-18 and 2021-22, California school districts face fiscal pressures that threaten to destabilize school district budgets and force reductions in services to students. Examples of these fiscal pressures include reduced funding due to declining enrollment; the costs of upkeep and renovations for aging school facilities; increasing special education program costs; increasing employee health care costs; and the costs associated with recruiting, retaining and training teachers, including ensuring competitive wages. And for many California school districts, the most daunting fiscal pressure is the rising cost of employee pensions, totaling a \$1-billion increase over the previous year in costs to districts statewide during the 2017-18 school year alone."<sup>13</sup>

*Just how significant is the impact of rising state pension costs on school district budgets?*

In a word: **Very**. For California, as for many other states, the rising cost of pension obligations presents a serious challenge, particularly for school districts.

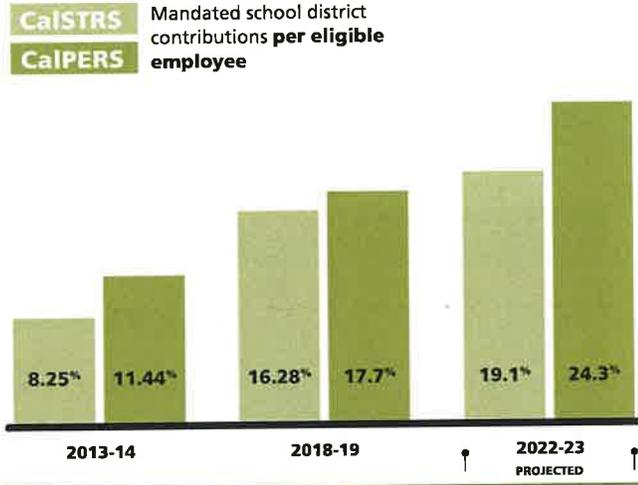


Despite overall increases in state funding to schools since the Great Recession, many districts report that they are or soon will be in the difficult position of making budget cuts due in part to the need to fulfill the rising pension obligations set by the state. School districts' pension contribution rates for CalSTRS, which covers certificated educators, and CalPERS, which covers other school employees, are set by the Legislature.

<sup>12</sup> California Budget and Policy Center, "What reaching full implementation means and why it matters" – [calbudgetcenter.org/blog/what-reaching-lcff-full-implementation-means-and-why-it-matters/](http://calbudgetcenter.org/blog/what-reaching-lcff-full-implementation-means-and-why-it-matters/), April 2018.

<sup>13</sup> WestEd, "The Silent Recession: Why California school districts are underwater despite increases in funding." April 2018.

Thus, districts have little ability locally to control these pension costs, which have risen dramatically.



**What about the impact of rising expenses for serving Students With Disabilities?**

The federal **Individuals with Disabilities Education Act (IDEA)** requires local educational agencies to provide “specially defined instruction, and related services, at no cost to parents, to meet the unique needs of a child with a disability.” These services are in addition to what a nondisabled student receives. Roughly one in 10 California students receives some type of **special education** services. Services are administered through approximately 130 Special Education Local Planning Agencies (SELPA), which can be consortiums of local districts or single large school districts.

A combination of targeted federal funding (about \$1.2 billion) and state funding (\$3.8 billion) helps subsidize services for students with disabilities, with local districts covering the majority of the cost through their general budgets (\$8.8 billion). This includes expenses for teachers and other salaried employees who work with students with disabilities, services and resources for those students, transportation, and other expenditures to ensure districts are serving students with disabilities in accordance with federal and state laws. (These can range from due process costs or even tuition for schooling alternatives when a public school can’t meet a student’s needs. Annual

**CalPERS, CalSTRS and UNFUNDED LIABILITIES**

There are two major pension funds for employees in K–12 education in California: the California State Teachers Retirement System (CalSTRS) and the California Public Employees’ Retirement System (CalPERS). CalSTRS, which administers pension benefits for teachers, principals, and other certificated employees such as speech therapists, school psychologists, and nurses, is the nation’s second-largest public employee pension fund. CalPERS provides pension benefits for classified employees such as classroom aides, school security officers, and food services, maintenance, and clerical staff. To provide benefits to their members, CalSTRS and CalPERS funds rely on contributions from members, employers and the state, as well as income from investments.

Unfunded pension costs are the difference between the benefits promised to employees and the current savings available in the funds to meet those financial commitments. It is this unfunded liability that has driven dramatic increases in the amount that school districts must contribute to the funds.

Source: WestEd

costs for schooling alternatives may often exceed \$100,000 per student with disabilities.)

Federal and state funds are not intended to support the full costs of educating a Student With Disabilities, just the excess costs resulting from the need to address his or her disabilities. However, because federal and state funds typically have not come close to covering the costs of required services, local education agencies spend from their local LCFF general funds to make up the difference. The share of overall costs funded through these local contributions has been growing over time, while the shares covered by state and ongoing federal funds have declined. This is due to the combination of increasing overall costs and relatively flat state and federal funding.<sup>14</sup>

<sup>14</sup> Public Policy Institute of California and EdSource



Federal funds typically cover less than 20 percent of overall special education expenditures. This is notably lower than the amount the federal government originally committed to provide in support of such services. Based on Congressional and Presidential actions from 1975, the Individuals with Disabilities Education Act expresses intent to appropriate funding for each Student With Disabilities up to 40 percent of the national average expenditure level per K–12 pupil, which would equate to roughly 40 percent of California’s overall special education expenditures. To date, the federal budget, however, has never come close to providing states with this amount.<sup>15</sup>

Many regard the current funding system for students with disabilities as “insufficient, inefficient and inequitable.”<sup>16</sup> For one thing, funding is tied to total enrollment rather than to the number of students with disabilities. This can greatly exacerbate underfunding in districts where overall enrollment is steady or declining, but the number of students identified with disabilities is rising.<sup>17</sup> Another problem is that funding is based on an antiquated formula that varies drastically between SELPAs and has no relationship to the students being served. The state legislature has begun considering options for improving the special education funding

<sup>15</sup> Legislative Analyst’s Office

<sup>16</sup> EdSource

<sup>17</sup> For example, Jayne Christakos, chief business officer for San Bernardino City Unified, testified at a legislative hearing that at the same time district enrollment dropped by 398 students – a loss of \$4 million in general funding and \$210,000 in special education funding – the

system<sup>18</sup>; education advocates also continue to push the U.S. Congress to meet its share of the obligation for funding.

**Federal funds typically cover less than 20 percent of overall special education expenditures.**



number of students identified with disabilities increased by 189.

<sup>18</sup> See EdSource’s “Special Education Funding is a Morass: Straightening it out may not be cheap or easy” – [edsources.org/2018/special-education-funding-is-a-morass-straightening-it-out-may-not-be-cheap-or-easy/594336](https://edsources.org/2018/special-education-funding-is-a-morass-straightening-it-out-may-not-be-cheap-or-easy/594336)

# 4

## Basics of Local School District Budgets

*What exactly is a school district budget, and on what is it based?*

The budget is the guiding financial plan for meeting the local school district governing board’s goals and objectives for the year. It represents how much a local district estimates it will receive in income/revenue, and the maximum expenditures authorized by the board, and the balance (negative or positive) when the year is done.

Because education funding levels are essentially up for debate every year as part of the annual state budget process, school districts rely on projections but actually do not know for certain the amount of funding to be received until the state budget is approved by the end of June. Therefore, it is understood that:

- Local district budgets change and need to be revised.
- The budget should represent the policy and conceptual priorities of the organization and must inform resource allocation related to the implementation of the Local Control and Accountability Plan (LCAP).
- The budget should be balanced, and if there is deficit spending, it must be explained, and a plan developed to return the budget to a balanced state.

Budgeting in school districts is based on multi-year projections. Given that ...

- A district must have the ability to accurately reflect its net ending balance and maintain a reserve for economic uncertainties throughout the budget monitoring process.
- The long-term impact of current decisions must be assessed and must be multi-year planned (current plus two years).
- The district should have tools and procedures that ensure an early warning of any discrepancies between the budgeted and actual revenues and expenses.<sup>19</sup>

BUDGET AND LCAP CALENDAR	
☐ November/December	Develop expenditure projections. Reflect on current LCAP goals and progress.
☐ January	Governor releases state budget proposal. Begin seeking input to update LCAP. Present preliminary budget to Board.
☐ February	Governing Board establishes priorities.
☐ March/April	Input on LCAP by stakeholders and required committees. Budget committee reviews budget priorities for inclusion in proposed budget.
☐ May/June	Revise revenue projections based on Governor's "May Revise" budget. Budget and LCAP made available to public.
☐ Late May/Early June	Concurrent public hearing on LCAP and budget.
☐ On or before July 1	Adopt LCAP and budget.
☐ September/October	Review and notification by county superintendent.

*What are the main expenditures in school district budgets?*

Teacher and staff salaries, which go toward providing instruction and instructional support to students, plus health and welfare benefits, make up about 80 percent of expenses in most districts.



<sup>19</sup> Source: Fiscal Crisis Management and Assistance Team (FCMAT)

### *What factors impact a local budget? What are the main challenges for school districts in balancing budgets and maximizing the amounts available for student support and services?*

While every school district is unique, various state and local factors can be major challenges to local district budgeting, such as:

- Enrollment uncertainties
- The number of students living in poverty, English learners, and foster and homeless youth
- The state's volatile tax structure
- Collective bargaining costs
- Increased share of state pension costs that districts/employers are required to pay
- Rising costs to serve Students With Disabilities
- Health and welfare benefits for employees
- Rising minimum wage costs
- Utilities costs
- Staffing formulas (including what is called "Step and Column," which defines compensation based on years of service/continuing education credits as negotiated by districts and their labor unions)
- Program augmentation/reductions
- Overall levels of state funding
- Federal funding uncertainties from year to year
- Other unavoidable costs

### *Who oversees local school district budgets?*

Elected local governing boards approve school district budgets. State law (often referred to by its original authorizing legislation, as "AB 1200") sets additional financial standards for school districts and includes mechanisms to ensure adequate oversight. County offices of education are required to review and approve the annual budgets of each local school district. Districts must certify if they are able to meet their financial obligations for the current plus two additional years. County offices of education validate those self-certifications.

AB 1200 was enacted to help school districts avoid insolvency; it is a progressive law and empowers county offices of education with fiscal oversight to follow a progression of interventions when necessary, ranging from information and collaborative assistance to lowering a self-certification from

"positive" to either "qualified" or "negative" to taking more stringent actions such as appointing a fiscal advisor.<sup>20</sup>

### *What are the three major "certifications" of a district budget?*



**Positive** – District will complete the year with a positive fund and cash balance; the district is solvent and can meet its obligations.



**Qualified** – District may not complete the year with a positive fund or cash balance; financial indicators require scrutiny/modest intervention.



**Negative** – District will not complete the year with a positive fund or cash balance; aggressive corrective action is required.

### *Can local districts raise additional revenues?*

California law severely limits local school districts' revenue-raising authority compared with most other states, and also compared with what was possible in the state prior to the 1970s. Under current state law, districts can augment the local funding of their schools in just a few ways, most notably private donations (such as through local community foundations), parcel taxes (which require a two-thirds vote to assess a flat fee on each parcel of property, no matter what its size or value), and the seldom-used sales tax for schools (which also requires a two-thirds vote and can be done only at the county level.) Taken together, these revenue sources currently generate a very small portion of total K–12 funding in the state, though in some communities they provide substantial amounts per pupil.<sup>21</sup> About one in 10 school districts, primarily districts in the Bay Area, have approved additional taxes.<sup>22</sup>

<sup>20</sup> Sources: Ed100.org and Fiscal Crisis Management and Assistance Team

<sup>21</sup> EdSource, Local Revenues for Schools: Limits and Option in California, 2009

<sup>22</sup> EdSource, [edsources.org/2017/expand-their-taxing-power-would-be-one-way-to-provide-school-districts-more-money/585351](https://edsources.org/2017/expand-their-taxing-power-would-be-one-way-to-provide-school-districts-more-money/585351)

By contrast, cities and counties in California have the power to raise general taxes, primarily the sales tax, with a simple majority approval, as opposed to the two-thirds requirement for school districts. The one exception is local construction bonds, which school districts can pass with a 55-percent majority vote of the community. These bond proceeds must only be utilized for construction and modernization projects outlined in ballot language and cannot be utilized to offset rising General Fund expenditures.

It would take a constitutional amendment that either the Legislature or voters, through an initiative, places on the ballot to provide local districts with more local revenue-raising capacity.

### ADDITIONAL QUESTIONS?

CASBO is here to help provide you with information about school finance and business in California. Contact us at 916-447-3783 or at [casbo.org](http://casbo.org)

## About CASBO

CASBO supports public schools and school leaders in California by providing professional training and creating opportunities for collaboration in every facet of school business management and operations. CASBO represents 23,000 school business officials in all K–14 business disciplines, from chief business officers to technology, human resources and facilities directors.

CASBO supports a robust school finance system that empowers local educational agencies to invest in high-quality instructional services and programs that meet the needs of our students, as well as policies that foster local innovation to improve student achievement and create safe and optimal learning environments for our students, educators and local communities.

CASBO recommends that local and state officials should focus on the following areas:

### Funding Stability

Stabilizing the state’s fiscal structure and local revenue authority to ensure public education has the appropriate funding support that aligns with providing equitable and high-quality education to all of our students.

### Investing in Our Students

We aspire toward a future that commits to putting our students’ academic success first and helps schools sustain innovative programs that ensure they are college and career ready.

### Supporting Special Education

Our students with exceptional needs deserve equitable resources to support high-quality services and early

childhood intervention. Unfortunately, the federal government has not maintained its commitment to fund the Individuals with Disabilities Education Act (IDEA).

### Supporting Safe School Environments

CASBO supports the historic partnership between the state and local school districts and county offices of education to finance school facility construction and modernization projects. With regard to use of voter approved Proposition 51 Public School Facility Bond Initiative funds, we support:

- Establishing a schedule of when general obligation bond funding will be available;
- Increasing the bond sales from Governor Brown’s proposed \$640 million to \$3 billion;
- School districts’ ability to provide “safe, secure and peaceful” schools, as stated in our state’s Constitution.

## ACKNOWLEDGMENTS

CASBO is grateful to the following for providing information, analysis and reports that informed this publication:

<a href="#"><u>California Budget and Policy Center</u></a>	<a href="#"><u>California Legislative Analyst’s Office</u></a>
<a href="#"><u>Californians Dedicated to Education Foundation</u></a>	<a href="#"><u>Public Policy Institute of California</u></a>
<a href="#"><u>California Department of Education</u></a>	<a href="#"><u>School Services of California, Inc.</u></a>
<a href="#"><u>EdSource</u></a>	<a href="#"><u>Stanford University and Policy Analysis for California Education “Getting Down to Facts II”</u></a>
<a href="#"><u>Ed100.org</u></a>	<a href="#"><u>State Assembly Education Committee</u></a>
<a href="#"><u>Fiscal Crisis and Management Assistance Team (FCMAT)</u></a>	<a href="#"><u>WestEd</u></a>

Copyright 2018 by CASBO. All rights reserved.



*The foremost authority on school business.*

1001 K Street, 5<sup>th</sup> Floor, Sacramento, CA 95814

Phone: 916-447-3783 | Fax: 916-447-3794

[casbo.org](http://casbo.org)

## How Students Are Counted

Different pupil counts, serve different purposes. Learn more about Census-Day Enrollment vs. Cumulative Enrollment vs. Average Daily Attendance. This information is presented by Ed-Data, an Educational Partnership between the California Department of Education (CDE), EdSource and the Fiscal Crisis Management and Assistance Team (FCMAT). Ed-Data collects fiscal, demographic and performance information on California's K-12 Schools.

---

School districts collect and report data on students throughout the year. Because students transfer in and out of schools throughout the year, different ways of counting students have been established depending on the purpose and requirements of the data being reported.

For most of its history, Ed-Data only reported Enrollment and Average Daily Attendance (ADA). The enrollment counts on Ed-Data were collected and reported by districts to the states on the first Wednesday in October, which is also known as Census Day or Information Day.

However, as part of its more detailed data collection and reporting on suspension, expulsion and chronic absenteeism rates, the California Department of Education has developed a new end-of-year enrollment count known as Cumulative Enrollment. We have now added a Cumulative Enrollment graph on Ed-Data.

There are important differences in the Census Day Enrollment and the Cumulative Enrollment, both in terms of which students are counted and where each type of enrollment is used and they cannot be interchanged. To distinguish between the two, we have changed the name of the original Enrollment graph on Ed-Data to "Census Day Enrollment," while the new graph is called "Cumulative Enrollment."

On Ed-Data, you will now find these three student counts:

**Census Day Enrollment counts**, which are taken on the first Wednesday in October (known as Census Day or Information Day), establish a baseline count of the students attending a particular school along with important demographic information such as race/ethnicity, whether the students are English learners, how many qualify for free and reduced-price meals, and much more. Most of the student demographic and performance data reported by the state and available on Ed-Data is based on Census Day enrollment. This includes English learner data, teacher-pupil counts, and more. The enrollment graphs on Ed-Data don't include short-term enrollments, such as students who were enrolled for fewer than 30 days.

**Cumulative Enrollment**, is collected at the end of the year and is currently only used for the following data sets: Chronic Absenteeism and Suspensions and Expulsions. Cumulative enrollment consists of the

total number of unduplicated primary and short-term enrollments within the academic year (July 1 to June 30), regardless of whether the student is enrolled multiple times within a school or district. Cumulative enrollment is calculated at each reporting level (e.g., school, district, county, and state) and therefore is **not** necessarily additive from one reporting level to the next. For example, if a student is enrolled in multiple schools within a district during the academic year, they are counted once at each school, but only once in the district's cumulative enrollment.

**Average Daily Attendance, or ADA**, is the count used to apportion funding for schools and is based not directly on the number of students enrolled but rather on the days of school attended by those students. To facilitate comparisons, the financial data on Ed-Data are reported in terms of "dollars per ADA." as well as in total dollars. ADA is the total number of days of student attendance divided by the total number of days taught. A student attending every school day would equal one ADA. Generally, ADA is lower than enrollment due to such factors as transience, dropouts, and illness.

ADA is currently only reported at the state and district level. The ADA reported on Ed-Data comes from the California Department of Education's Current Expense of Education calculation. *Note:* District-level ADA may include attendance for some charter schools but not others.

*Please remember: Because they are collected at different times and can reflect different student populations, Census Day Enrollment, Cumulative Enrollment and Average Daily Attendance (ADA) cannot be used interchangeably.*



**Review of the 2016 District Facilities Master Plan  
and  
Recommended Updates**

**Citizens Committee Report  
to  
The Paso Robles Joint Unified School District**

**October 31, 2019**

## Contents

	Page
Purpose	1
Summary of Recommendations	1
Focus and Methodology	2
Campuses	
Pat Butler Elementary	4
Kermit King Elementary	5
Georgia Brown Dual Immersion Magnet School	5
Winfred Pifer Elementary	6
Virginia Peterson Elementary	7
Marie Bauer Pre-School	7
Glen Speck Academy of Arts	8
Daniel E. Lewis Middle School	8
George H. Flamson Middle School	9
Summary of Recommendations and the Impact on FMP Projected Cost	10
Recommended Revised FMP versus 2016 FMP Total Program Cost	11
Projects to be Considered for Future Inclusion in the FMP	11
Committee Recommendations	11
Appendices	12
Summaries of the Committee Meetings with School Principals	Appendix
Pat Butler	I-a
Kermit King	I-b
Georgia Brown	I-c
Winfred Pifer	I-d
Virginia Peterson	I-e
Marie Bauer and Glen Speck	I-f
Daniel E. Lewis	I-g
George H. Flamson	I-h
2016 Facilities Master Plan Classroom Construction Costs	II
Revised Classroom Cost Calculation	III
Recommended Facilities Master Plan Modifications: Assumptions and Calculations	IV

**Review of the 2016 District Facilities Master Plan  
and  
Recommended Updates  
Citizens Committee Report  
to  
The Paso Robles Joint Unified School District**

**Purpose**

In July 2019 Dr. Curt Dubost nominated and the Board of Trustees appointed a citizens committee to review the 2016 Facilities Master Plan (FMP) adopted by the Board pursuant to the \$95 million general obligation bond (Measure M) approved by Paso Robles voters in 2016. The purpose of this review is not to re-do the FMP but to recommend the first update of project priorities and cost estimates based on current needs, District experience in project development since 2016 and input from the District's engineering firm, LEAF Engineers.

**Summary of Recommendations**

The Committee determined three items not dealt with in the 2016 FMP that should be top priorities for the District.

- Roof renovations
- HVAC renovations
- Shade covers for student eating areas

The first two bullet points involve major expenditures with further study being required by the District as discussed later in this report.

On the other hand, there are a number of projects in the 2016 FMP that are not of sufficient importance so as to be considered top priorities for the District.

- Playfield renovations
- Most parking lot and drop-off improvements
- Administration building and library improvements at Daniel E. Lewis Middle School

These additions and deletions, when combined with projected construction costs being slightly lower than those contained in the 2016 FMP, result in the Facilities Master Plan remaining in balance e.g. the overall expected expenditures do not exceed \$95,000,000.

There are other important projects that, while not as essential as those listed above, are extremely important. These include a new MPR for Georgia Brown and a new MPR for Glen Speck with accompanying re-purposing of the existing MPRs. One area the District could explore to fund these two items is how many new classrooms it needs to build.

The 2016 FMP provides for the construction of 80 new classrooms at a cost in excess of \$57,000,000. It also contains the demolition of 46 relocatable classrooms resulting in a net increase of 34 classrooms. The District should evaluate the following in order to determine if funding can be re-directed from building new classrooms to other projects such as new multi-purpose rooms:

- Do growth projections for Paso Robles and the demographic make-up of that growth justify the addition of 34 new classrooms in the District?
- Is it possible to re-condition and retain some of the relocatable classrooms so as to avoid incurring the cost of new construction?
- There are vacant and under-utilized relocatables within the District. Can they be better utilized in order to avoid expenditures for new construction?

It is the expectation of the Committee that the District will not need to utilize Measure M funds to build all the 80 new classrooms due to a combination of the following:

- They are all not needed
- Rehabilitated relocatables can be utilized
- Developers' fees are available to build new classrooms.

These recommendations are discussed in more detail in the balance of this report and summarized along with their financial impact under **Summary of Recommendations** ..... on page 10.

#### **Focus and Methodology**

The Facilities Master Plan is a living document. At a given point in time the FMP is the District's best view of how the Measure M funds will be expended to serve the needs of the District consistent with the original conditions of approval. The full execution of the projects that the Measure M funds will finance will take a number of years during which time the District's experience, priorities and cost estimates will evolve. It is important therefore that the FMP be reviewed and updated frequently to stay relevant as changes occur.

The cost estimates contained in the FMP are just that, estimates. The FMP is not a construction budget as there are not detailed construction plans, specs or bids on which to base it but are the best estimates available that will be finalized when detailed plans are developed to implement specific items.

The primary focus of the Citizens Committee was on priorities and any impact on overall cost estimates that a recommended change in priorities would cause. The specific process followed by the Citizens Committee was as follows:

- Review the 2016 Facilities Master Plan including discussions with District personnel.
- Meet with each of the six elementary and two middle school principals. These meetings lasted for approximately two hours with the primary focus being to obtain from the principals their first, second and third priorities for future capital improvement needs and a discussion of these priorities. This was followed in all cases with a campus tour. After the meeting a draft summary of the meeting was developed which was sent to the principal for his or her review with the final summary incorporating the principal's corrections and additions. These summaries are included in Appendices I-a to I-h. They are an integral part of this report and should be read for a full understanding of the issues facing the District.

The Committee was extremely impressed with the knowledge, intelligence, dedication and candor of all the principals we met with. The District is fortunate to have such an outstanding group of professionals overseeing its six elementary and two middle schools.

- A primary source for updating classroom construction cost estimates is the District's ten classroom building currently under construction on the Flamson campus. The construction contract prices, adjusting for expected changes that could occur during construction (change orders) give the single best source we have available to estimate the cost of future building construction.
- Given the District-wide nature of the HVAC issues, and lacking a campus-by-campus study by industry professionals as to individual campus requirements, the Committee has determined that the best approach at this time is to provide a District-wide allowance in the FMP to address the issue of HVAC renovation with future studies required to detail requirements by campus. We have consulted with the District's engineering firm LEAF Engineers on the expected cost of HVAC renovation projects recommended in this report. The 2016 FMP provides for major work to be done at Bauer, Speck and Brown which will include new and/or renovated HVAC systems. The Committee is recommending \$3,900,000 be included in the revised FMP to provide for work at the other campuses.

It is important to note that replacing the HVAC units, many of which are twenty years old or older, will substantially increase operating efficiency and reduce energy costs with a direct benefit to the District's operating budget.

- Similar to the situation with HVAC systems there are major issues with roofs and gutters on a number of the campuses, particularly the older ones. The District has received some preliminary analyses that would indicate these costs could easily exceed \$1,000,000 each on the older campuses. A study is needed to determine the extent and cost of needed renovations. The Committee is recommending the FMP include \$4,500,000 to cover roofs and gutters.

As there are currently no studies let alone plans, specs or bids available to estimate the extent of the work required on the roofs and gutters this is a cost estimate that is highly subject to change.

All recommended modifications are summarized in **Summary of Recommendations** ..... on page 10. The detailed cost assumptions and calculations supporting these recommendations are included in Appendix IV. As noted earlier, this report deals with recommended changes to the 2016 FMP. If a particular item is not addressed in this report the Committee is recommending no changes to that item.

#### Construction Costs

Appendix II summarizes the total cost for the construction of new classrooms as contained in the existing 2016 FMP. It includes the construction of eighty classrooms comprising 91,414 sq. ft at a total cost of \$57,128,960 or \$625 per sq. ft.

The District currently has under construction a ten-classroom building on the Flamson campus. Four other campuses in the District (Butler, Kermit King, Peterson, and Lewis) have planned classroom construction projects similar to the ten-classroom building at Flamson. Utilizing the construction cost for the Flamson building for these buildings results in a reduction in projected cost of \$2,800,000 from the cost that is included in the 2016 FMP. A detailed calculation of this reduction in projected cost is contained in Appendix III.

### Renovation of Fields

Several issues were raised that are common to all or nearly all campuses. These include shade structures, HVAC and roof issues and student drop-off and parking. These issues are specific to the individual campuses and will be discussed campus by campus in the next section.

There is one item that was common in the discussions at all campuses, **Renovation of Fields**. The eight principals were unanimous in their assessment that while an upgrade to the playing fields would be desirable, it is not necessary. The fields are satisfactory as is. Given other higher priorities, this item should be removed from the FMP for all campuses for a cost savings of \$3,390,000.

### **Following are recommended modifications to the 2016 Facilities Master Plan by campus.**

#### **Pat Butler Elementary**

##### Shade Structure:

The 2016 FMP provides as a Priority List B item \$90,000 to renovate the current shade structure. There is no current shade structure on the campus but one is badly needed to provide shade for students eating outside. It is recommended this be added to the FMP at an estimated cost of \$440,000.

##### Student Drop-off Reconfigure Parking and Retaining Wall

A full discussion of this issue is contained in Appendix Ia. The 2016 FMP provides \$950,000 to address this issue. It is the view of the principal that while drop-off and parking issues are an inconvenience, they are not serious enough to justify the expenditure of nearly a million dollars. As discussed in Appendix I-a there are several more modest measures that could be adopted to alleviate the problem at a much lower cost. There is a landscaped area to the right of the parking lot entry area that could be utilized to develop additional parking at modest cost. However given other priorities it is recommended this project be considered in the future if funding is available.

In addition the under-utilized bicycle parking area (only a couple of bicycles were stored there during the Committee's visit to the campus) could be developed as employee parking with a much smaller bicycle parking area provided elsewhere on the campus. The Committee is not recommending that this be added to the FMP but has included it in the list of projects to be considered in the future if funding is available.

The Committee recommends the entire \$950,000 for parking lot and drop-off improvements be eliminated from the FMP.

##### HVAC and Roofs

The nearly twenty-year-old buildings have serious roof and HVAC issues, the fixing of which is the top priority for this campus. There are serious roof leaks, leaks in the wells containing the HVAC units, inefficient and poorly performing HVAC units and concealed gutters that are failing within the building soffits and walls. It is contemplated that the roofs and HVAC units need to be totally replaced and the gutters replaced as well. This item is addressed in the District-wide recommendation for HVAC and roof renovation discussed above in **Focus and Methodology**.

**Kermit King Elementary**Shade Structure

The top priority at Kermit King is a new or expanded shade structure to accommodate an additional 90 students. The existing MPR is not adequate to feed all the students at once. Students and staff benefit from the students having time outside to relax but Paso Robles's hot weather necessitates the eating area be covered.

The principal would prefer a separate new structure for the youngest students but expanding the current structure would be workable. The 2016 FMP provides for renovation of the existing structure, but none is required. This \$160,000 item should be removed from the FMP.

The Committee recommends building a second structure to seat 100 of the younger students be built at an estimated cost of \$220,000.

Expand the Existing Kinder Playground

The existing kinder playground needs to be expanded. The adjacent bicycle storage area, as in all other schools in the District, is little used and would be the likely area for expansion. Estimated cost: \$210,000.

HVAC system, roofs and gutters

Problems occur at times but appear to be maintenance issues rather than systemic problems.

Playing Fields

As noted earlier, this is not a major issue and no work is required.

**Georgia Brown Dual Immersion Magnet School**

This is the second oldest school in the District with the buildings being more than 70 years old; the entire campus needs major improvements/upgrading. The popularity of the dual immersion program has resulted in there being 670 students at this school which puts immense pressure on the inadequate physical plant.

Classrooms, HVAC, Roofs, Playground Structures and Restrooms

The 2016 FMP appears to deal with the shortage of classrooms with the building of ten new classrooms and the removal of six relocatables resulting in a net addition of four classrooms.

There are major roof leaks during the rainy season due to age and their "butterfly" design (See Appendix I-c, the summary of the meeting with the principal at Georgia Brown, for a fuller discussion). There are only two restrooms for boys and two for girls which is not adequate for 670 students.

There are an inadequate number of play structures and some existing structures are in poor condition or have been fenced off to prevent student access due to safety concerns.

There is a total of \$4,500,000 in the 2016 Facilities Master Plan for the two items "Modernize Kindergarten" and "Major Modernization". It is the Citizens Committee's expectation that this will be adequate to address the roofs, HVAC, playground structures and restroom issues identified herein

### Multipurpose Room

Given the size of the student population on this campus and its limited size, the existing MPR is totally inadequate. Only two classes can be accommodated for lunch necessitating three lunch periods being scheduled. Likewise, assemblies can only accommodate two classes and any parent-attended functions involving more than one class must be scheduled outside. The Committee recognizes that this is a highly desirable and needed improvement but, given other priorities, is not able to recommend it be added to the FMP. It will be placed at the top of the list of other projects to be built if funding can be secured.

### Parking, Campus Access, Student and Bus Drop-off

The campus has only 6.85 acres of usable land which makes accommodating these functions extremely challenging. The 2016 FMP includes a total of \$620,000 to Improve Automobile and Bus Drop-off.

- The current entrance design does not direct visitors to the reception area. The entrance gate is in a position that bypasses the office and signage is required to direct foot traffic to the office prior to entering school grounds. Better design is needed to provide entrances that can be more readily monitored and which facilitate appropriate security levels to guard against unmonitored entrance by individuals to the school.
- Busses currently park on Oak Street. Students enter the busses directly from the campus after crossing the sidewalk. As Oak Street is very lightly travelled in this area it is the Committee's opinion that improving the Bus Drop-off is not necessary. However, it is recommended that the \$290,000 of funds allocated in the 2016 Facilities Master Plan for a revised bus drop-off be utilized to resolve the other parking and access issues discussed herein.

### **Winifred Pifer Elementary**

#### Shade Structure

The top priority for this campus is the construction of a shade structure to accommodate students eating outside. The two existing shade structures are essentially useless. They were both designed with a large opening in the center of the roof that precludes their supplying meaningful shade. They are also located in less than ideal locations being too distant from the kitchen and noise from them being disruptive to classes in nearby classrooms.

Three alternatives were discussed with the principal to meet the need for adequate shade structure(s) on the campus. (See Appendix I-d for a discussion of these alternatives.) It is the opinion of the Committee that the most viable alternative is to construct a new shade structure of approximately 2850 sq. ft. on the right side of the MPR when looking toward the playing fields. This would be close to the kitchen and would not conflict with classrooms. It is also close to the kindergarten area whereas the other options are not.

The estimated cost of this shade structure is \$440,000.

#### Parking and Student Drop-off

The City is planning to improve Creston Road which will result in no parking being allowed on Creston Road in front of Pifer. Currently many parents park there to drop off or pick up their children. In order to address this effective loss in drop-off utility it is recommended that additional parking be developed on-campus for staff parking. Specifically the area known as Pifer Park, which was formerly a garden area and is currently bare ground, located directly south of the MPR on the campus south property line is available to develop a staff parking lot. There is an existing access road to this area off the end of either

Rosemary or Patricia Lanes. Moving staff parking to this area would free up spaces and room for drop-off both in the lot in front of the school as well as the parking lot accessed off Lana Street.

There is \$90,000 currently in the 2016 FMP to improve student drop-off which can be utilized to create this staff parking.

#### Play Structures

Shade cover over the play structures in the kinder area are badly needed. Estimated cost: \$80,000

#### HVAC

During hot weather there are continuing problems with keeping the rooms cool enough so as not to affect student learning. Some of this may be attributable to thermostat settings but the air conditioning units are 25 years old and likely need to be upgraded.

#### **Virginia Peterson Elementary**

##### Shade Structure

There is no shade structure at Virginia Peterson. As with the other campuses, this is seen as a top priority for a student eating area. Estimated cost: \$440,000.

##### HVAC, Roofs and Gutters

This school was built in 1988, about the same time as Pat Butler and has the same concealed gutters as Pat Butler. Significant upgrades are required.

##### Play Structure Shade Covers

Small shade covers over the two play structures would make them usable during hot weather. The day the Citizens Committee visited the site the slide was extremely hot to the touch and therefore unusable for students. These shade structures could be of fabric as rain protection is not required. Estimated cost: \$80,000.

##### New Play Area

The Concept Site Plan contained within the 2016 FMP provides for a new six classroom building in the area where two relocatables are to be removed. A new play area in front of this new building and the currently bare ground adjacent to that should be developed into a new kinder and special needs play area. Cost \$210,000.

#### **Marie Bauer Pre-School**

Plans for renovations to this campus have been finalized and bid.

#### **Glen Speck Academy of Arts**

Planning for the renovation of the Glen Speck campus are also well advanced with detailed plans having been submitted to the State of California for review. As such the Citizen's Committee is not in the position of impacting the planning process to the same extent as it is with the other campuses.

A new, larger multi-purpose room is important in the long run to attract students from elsewhere in the District to Glen Speck's arts programs. If a new MPR is built the existing MPR could be retained and put to alternative uses, perhaps as additional classrooms.

While the Citizen's Committee is not recommending the Speck MPR be included in the FMP at this time (other items having a higher priority) it is being included on a list of highly desirable projects included at the end of this report to be built if funding can be secured.

### **Daniel E. Lewis Middle School**

#### HVAC and Roofs

The HVAC systems in all buildings are a problem. Fixing them is the number one priority on the campus. This is the item receiving the most complaints from students, staff and parents as it is often difficult for the students to work during extremely hot weather in the spring and fall. The systems are old and total replacement may be necessary

While not a wide-spread problem, there are roof leaks when it rains.

#### Building Construction – Administration Building Replacement

The 2016 Facilities Master Plan contemplates demolishing the existing administration building and including those offices in a two-story building which would also include classrooms. The current single-story administration building is functional and is meeting the school's needs, a view which is shared by the principal of the school. The existing building consists of 3931 square feet. To include it as a portion of a new building at the average cost of \$625 per square foot contained in the 2016 Facilities Master Plan entails spending \$2,450,000 that, in the Committee's view, can be better spent elsewhere.

The Committee recommends the existing administration building be retained and not demolished for a savings of \$2,450,000.

#### Gym

Due to the limited capacity of the MPR the gym is used for assemblies. The audio system works poorly for a student assembly or similar function and the lighting conditions make presentations difficult. There likely are limitations as to what can be done given the inherent characteristics of a gym, but the committee recommends the District utilize maintenance funds to address these issues.

#### Library

The 2016 FMP allocates \$1,000,000 to modernize the library. In the principal's view this is unnecessary as the library is functioning well. The \$1,000,000 should be eliminated from the FMP.

#### Parking Lot and Drop-off

The 2016 Facilities Master Plan provides \$1,400,000 for improving parking and drop-off. In the view of the principal drop-off and pick-up are a nuisance but not a priority for expenditures. The school is able to use an additional drop-off point in Centennial Park which relieves congestion at the front of the school. There is adequate parking for staff. The \$1,400,000 should be eliminated from the FMP.

#### Outside Public Address System and Alarm System

Neither of these systems work adequately and should be upgraded. The Committee has been advised by District staff that this can be addressed as a maintenance issue.

**George H. Flamson Middle School**Shade Structure

There currently is no shaded eating area for the students to eat outside. The need is to accommodate 200-300 students. This addition to the FMP is recommended at an estimated cost of \$440,000.

Student Drop-off

The current drop-off area on 24<sup>th</sup> Street is totally inadequate as it accommodates only 3 – 4 cars at a time and no busses. It is the principal's recommendation that the approximate 13,000 sq. ft. of setback from Spring Street be utilized to develop a bus and automobile drop-off area. The Committee recommends this addition to the FMP at an estimated cost of \$800,000.

Security

The campus is currently totally open from the parking lot. This security issue needs to be addressed to include the new building currently being built that will house ten classrooms initially utilized by Bauer Speck. The Committee has been advised by District staff that this can be addressed in conjunction with the ten-classroom building currently under construction on the Flamson campus.

Re-grade Fields

This is not a priority item with the principal. The playing fields are adequate as is. The Committee recommends this \$660,000 item be removed from the FMP.

**Summary of Recommendations and the Impact on FMP Projected Cost  
(See Appendix IV for the detailed cost calculations and assumptions)**

	Impact on Costs	
	Increase	Decrease
HVAC system renovation (Butler, Peterson, Pifer and Lewis)	\$ 3,900,000	
Roof and rain gutter renovation	\$ 4,500,000	
Eliminate playing field renovations, all campuses		\$ 3,390,000
Reduce projected classroom construction cost for Butler, Kermit King Pifer, Peterson, Lewis and Flamson (See Appendix III)		\$ 2,800,000
<b>Pat Butler Elementary</b>		
Shade structure	\$ 440,000	
Eliminate parking lot & drop-off improvements		\$ 950,000
<b>Kermit King Elementary</b>		
Second shade structure	\$ 220,000	
Expand kinder play area	\$ 210,000	
Eliminate existing shade structure renovation		\$ 160,000
<b>Georgia Brown Dual Immersion Magnet School</b>		
<b>Winifred Pifer Elementary</b>		
Shade structure	\$ 440,000	
Shade covers for two play structures	\$ 80,000	
<b>Virginia Peterson elementary</b>		
Shade structure	\$ 440,000	
Shade covers for two play structures	\$ 80,000	
New kinder and special needs play area	\$ 210,000	
<b>Marie Bauer Pre-School</b>	\$ -	
<b>Glen Speck Academy of Arts</b>	\$ -	
<b>Daniel E. Lewis Middle School</b>		
Retain existing administration building		\$ 2,450,000
Eliminate library modernization		\$ 1,000,000
Eliminate parking lot and drop-off improvements		\$ 1,400,000
<b>George H. Flamson Middle School</b>		
Shade structure	\$ 440,000	
New bus and automobile drop-off area	\$ 800,000	
<b>Total</b>	<u>\$ 11,760,000</u>	<u>\$ 12,150,000</u>

**Revised FMP versus 2016 FMP Total Program Cost**

2016 FMP Total Program Cost	\$94,997,000
Correct calculation errors in the 2016 FMP (See Appendix IV)	\$ 390,000
New projects	\$11,760,000
Deleted projects and reduced costs	<u>(\$12,150,000)</u>
<b>Revised FMP Total Program Cost</b>	<b>\$94,997,000</b>

**Projects Recommended for Future Inclusion in the FMP If Funding Is Secured**

Following are projects the Committee judges to be very important that would have the highest priority if funding can be secured:

- Georgia Brown Dual Immersion Magnet School MPR
- Glen Speck Academy of Arts MPR
- Add additional parking at the entrance to the Pat Butler parking lot and relocate the existing bicycle parking area and develop the area for staff parking.

**Committee Recommendations**

- Direct staff to update the 2016 Facilities Master Plan incorporating the recommendations contained in this report.
- Retain qualified HVAC and roofing professionals to do District-wide studies as to the status of the District’s HVAC and roofing systems and recommend measures to correct any deficiencies.
- Direct staff to update the Facilities Master Plan annually incorporating construction activity that has occurred in the previous year and a review of District priorities to ascertain what changes should be made in the Facilities Master Plan.
- Initiate projected population and demographic studies to determine the District’s need for future classroom construction. One use of this information will be for subsequent updates to the Facilities Master Plan to determine whether the building of 80 new classrooms as currently specified in the 2016 Facilities Master Plan is required or whether a lesser number of new classrooms in combination with the re-conditioning of existing relocatable classrooms will meet the District’s needs, thereby making funding available for other projects.
- Build shade covers this winter to be available for student use when hot weather comes in the Spring of 2020.

**Citizens Review Committee**

- Bill Krum
- Stan Case
- Hugo Bastidos

## Appendices

**Appendix I-a  
Summary  
PRJUSD Facilities Master Plan Meeting  
Citizens Committee  
and  
Pat Butler Elementary Principal Damien Capaiare  
7-29-19**

Damien expects enrollment this year to be 470 to 485. Per the 2016 Facilities Master Plan the school capacity is 504.

### **New Classroom Requirements**

Damien believes he needs two new classrooms

- One would be a regular kindergarten room (including restrooms) for students currently in a classroom that does not have a restroom. The vacated kindergarten classroom could then be used as a Learning Center for Special Ed students who currently meet in various rooms intended for administrative uses.
- The second new classroom would address the fact that one classroom currently has a 4/5 combo. Adding one additional classroom would allow for expected increased enrollment which will necessitate eliminating the 4/5 combo, replacing it with separate 4<sup>th</sup> and 5<sup>th</sup> grade rooms.
- There are two portable classrooms that are used only for the fee based after school PRYDE program. They are in use daily from the end of school until 5:30pm. In theory these rooms could be used during the day for regular classrooms but this would be disruptive as the PRYDE program has improvements and equipment different from a regular classroom. The portable buildings are adequate for the PRYDE program.
- The possibility of additional future enrollment growth needs to be discussed with District staff and future housing development discussed with the City to determine the likelihood of additional classroom requirements in the future

### **Shade Structure**

The Facilities Master Plan provides in Priority List B \$90,000 to renovate the current shade structure. There is no shade structure on campus to renovate but Damien feels constructing one for the students is important and a priority.

**Re-grading Fields**

The primary issue with the playing fields is the grade transition from the upper level (soccer field) to the lower field (baseball/softball diamond). The \$500,000 "Re-Grading Fields" item in the Facilities Master Plan contemplates grading the playing fields to a single level. While this would be beneficial, Damien felt that, given the very high cost, other items were of a higher priority and this project should be a lower priority. One of the complaints about the playing fields dealt with gopher holes which would doubtless remain a problem after the grading if additional eradication efforts were not undertaken.

**Student Drop-off, Reconfigure Parking and Retaining Wall**

The problem arises out of the fact that there is very limited amount of land on which the parking lot is located. There currently is not enough on-site parking to accommodate staff, resulting in their parking during the day on both Nicklaus and Wade. In addition morning drop-off and afternoon pick-up result in parents' cars forming a queue back out onto Nicklaus. The Facilities Master Plan proposes spending \$950,000 to address this problem. In Damien's view this is a serious inconvenience but not so severe as to justify spending nearly \$1 million to fix it. However it was felt that there are more cost efficient measures that could be taken to alleviate the problem. Measures that could be explored include:

- The bicycle parking area next to the parking lot in the northeast corner of the campus is grossly underutilized. Typically only a couple of bicycles are parked there. The bicycle parking area could be moved elsewhere and this area made available for parking.
- It appears the area to the right of the parking lot entry lane (not the steep slope towards the playing fields) could be utilized for some more parking spaces.
- The school buildings are set back much further from the parking lot than is found in other schools. There are permanent shade structures there which could be removed. While this would affect the aesthetics of the campus it would appear that another line of parking and/or drop-off area could be created across the entire front of the school.
- The parking lot could be expanded toward Nicklaus with the addition of a low retaining wall next to the sidewalk.
- Additional personnel could be assigned to assist/expedite drop-off and pick-up during the time of day when they occur.

It was felt that hiring a traffic engineer or architect qualified in circulation/parking issues to study this problem would be worthwhile.

### **Roofs and HVAC**

The Facility Assessment Data Sheet/Scoring (Appendix of the PRJUSD 1986 District Facilities Master Plan) specified the roofs as "repair necessary". In addition new HVAC units were identified as being required in the nearly twenty year old buildings. The cost of these replacement/repair items are presumably included in the \$4,560,000 "Minor Building Modernization" line item included in the PRJUSD 2016 District Facilities Master Plan Document. However, when the Priority List A (Totaling \$94,997,000) and Priority List B Project List B (Totaling \$27,500,000) were developed none of the Minor Building Modernization items were included.

There are serious problems that must be addressed as a top priority with regard to leaking roofs, leaks in the wells containing the HVAC units, inefficient and poorly performing HVAC units and the concealed gutters failing within the building soffits and walls.

**Appendix I-b  
Summary  
PRJUSD Facilities Master Plan Meeting  
Citizens Committee  
and  
Kermit King Elementary Principal Kelly Ward  
8-19-19**

Current enrollment is 470 students.

**Shade Structure**

The top priority is a new or an expanded shade structure. A new structure would be preferred in order to keep the youngest students in a different location and improve the lunch time experience but if economics dictate then expansion of the existing structure would be workable. The new or expanded shade structure needs to accommodate an additional 90 students seated at tables.

As in all the schools in the District the MPR space is not adequate to feed all the students at once. The students (and staff) benefit from the students having time outside to relax; accordingly, it is preferred the students eat outside but Paso Robles's hot weather makes it necessary to have the eating area covered.

Kelly is not aware of any problems with the existing shade structure. A conversation with the janitor confirmed that there are no leaks or other problems he is aware of. It is not known why the Facilities Master Plan includes \$160,000 to renovate the existing shade structure as a Priority B project.

**Expand the Existing Kinder Playground**

Kelly's second priority is to expand the existing kinder play area. The adjacent bicycle storage area, which as in all the other schools in the District is little used, would be a likely area for the expansion.

**HVAC**

There are problems at times with the HVAC system when cool air is required. This system is from a different manufacturer than any other system in the District. It is difficult for District staff to locate spare parts when needed.

**Roofs and Gutters**

There are some roof leaks particularly in rooms 209 and 303. Room 800 has a gutter problem. These problems are not general to the entire campus.

**Playing Fields**

The playing fields get very heavy use particularly during after school hours for such community programs as youth soccer. This heavy use results in worn grass areas but there does not appear to be any major problems beyond that. Additional water could address this problem. Renovating the playing fields is not a top priority for Kelly.

**Student Drop off**

The school has ample parking. It is necessary for parents to park their cars and get out to collect their kids. There is also a minor conflict between automobiles and the buses. Neither of these issues rises to the level of a significant issue for Kelly.

**Appendix I-c  
Summary  
PRJUSD Facilities Master Plan Meeting  
Citizens Committee  
and  
Georgia Brown Dual Immersion Magnet School  
Principal Celia Moses  
8-16-19**

Being the second oldest school in the district (built in 1948 with only Bauer being older), only 6.85 usable acres and having more students (670) than any other elementary school in the District it is apparent this campus needs major improvements/upgrading.

Being a magnet school, the majority of the students do not live in Georgia Brown's neighborhood. Between 30% and 35% of the students are from the immediate area and 65% to 70% come from elsewhere in the district. The school requires 50% of the students have English as their first language and 50% have Spanish as their first language. English learners comprise 37% of the students.

### **Classrooms**

Celia's top priority is classrooms. It appears the existing Facilities Master Plan addresses this issue with the building of ten new classrooms and the removal of six relocatables resulting in a net addition of four classrooms.

### **Roofs**

There are numerous leaks in the roofs. Last winter many buckets were distributed to collect the water that came through the ceilings. The basic design of the buildings is obviously a major contributor to this problem. Most of the buildings have what are characterized as "butterfly" roofs. These are the mirror image of normal pitched roofs. Water that falls on the roof is not directed immediately to the edge of the roof and a gutter. Rather the water is directed to the middle of the building (the two halves of the roof effectively forming a valley) from where it is then directed to the roof edge. The design of these roofs will continue to pose issues for any buildings that are not replaced or undergo a major renovation to the roof system.

**Multipurpose Room**

The multipurpose room is totally inadequate for the number of students at the campus. Only two classes can utilize the MPR at a time. Thus three lunch periods have to be scheduled, each accommodating two classes. Likewise assemblies can only accommodate two classes. Any parent attended functions involving more than one class must be scheduled outside.

**Playing Fields and Playground Structures**

Celia does not feel the playing fields are a priority. It is much more important to improve the playgrounds rather than investing major funds into the playing fields. The playing fields themselves appear to be level. Large areas with limited grass exist. It is possible that improvements to the sprinkler systems would be sufficient to get grass to fill in the bare areas without any other major work.

There are not enough playground structures for the number of students who wish to use them. In addition many that are there are not in good condition. When an apparatus breaks or is otherwise deemed unsafe the past practice has been to fence it off so it cannot be used rather than repairing or replacing it. There are several in this state currently on the campus.

**Restrooms**

The campus does not have enough restrooms. There are only two for boys and two for girls servicing the needs of 670 students.

**Student and Bus Drop-off**

This is an obvious problem given the limited size of the campus and how much space can be devoted to these functions. The Citizens Committee was in these two areas when the school day ended and students were leaving the campus. The more serious problem of the two appears to be parents coming to drop-off or pick-up their children by automobile given the limited size of the parking lot and adjacent streets. Busses park on Oak Street and the students enter directly from the sidewalk. This is not an ideal situation but Oak Street is very lightly travelled in this area so improving the Bus Drop-off is not a top priority.

**Campus Access**

The current entrance design does not direct visitors to a reception location. The entrance Gate is in a position that bypasses the Office and signing is required to direct foot traffic to the office prior to entering school grounds. Better design is needed to provide for more reasonably monitored entrances while maintaining appropriate security levels and guarding against unmonitored entrance by individuals to the school.

### **Other Issues**

- The PA system and bells do not work properly during wet weather.
- There is a serious internet bandwidth problem. For example when the fourth and fifth grades are taking tests that require access to the internet no one else at the school can be on line. This issue needs to be addressed with the internet provider, presumably Charter.
- Students have been instructed not to drink the water from the drinking fountains within the classrooms. The water is often brown in color. No such problem exists for drinking fountains outside the classrooms.
- Classroom #8 has bathrooms adjacent to it and the teacher there has reported continued problems with odors and water apparently coming from the bathrooms into the classroom.
- There is a lack to adequate parking for staff. Celia suggested utilizing the southeast portion of the playing fields to provide additional staff parking. It appears this could be done with no significant impact on the utility of the playing fields.
- There is a continuing problem with cockroach and flea infestations.
- Sewage backups continue to be a problem in the restrooms.

**Appendix I-d  
Summary  
PRJUSD Facilities Master Plan Meeting  
Citizens Committee  
and  
Winifred Pifer Elementary Principal Megen Guffey  
8-21-19**

**Enrollment**

Current enrollment is 450 including 30 special ed pre-school students. The special ed pre-school students will eventually go to Bauer when it is open again. In addition, there are 30 students from the District pre-school program and 30 enrolled in the state preschool program at the campus.

This campus is very similar in design to Kermit King and has the largest usable land area of any of the elementary school campuses. There are several existing classrooms that are currently lightly utilized and there is room to build additional classrooms to accommodate increases in District enrollment.

**Shade Structures**

Having functionally useful shade structures to accommodate the students eating outside out of the hot Paso Robles sun is Megen's top priority. The two existing shade structures are essentially useless. They were both designed with a large opening in the center of the roof that precludes their supplying meaningful shade. They are also located in less than ideal locations being further away from the kitchen than desired and noise from them being disruptive to classes in nearby classrooms. Three alternatives were discussed:

- Megen's first choice is to have a single shade structure built to the right side of the MPR when looking toward the playing fields. This would be close to the kitchen and would not conflict with classrooms. It is also close to the kindergarten area whereas the other options are not.
  
- Another alternative is to rebuild the two existing non-functional shade structures shown as item 1 on the Facilities Master Plan Concept Site Plan. The roofs of the two existing structures are in terrible shape with considerable dry rot. However, the concrete pillars and glulam beams supporting the roof appear to only have cosmetic problems. It could be

more cost effective to rebuild two roofs on the existing structures than to demolish them and build the new structure discussed above. Megen opined that this could work but, as noted earlier, is not her first choice because the location would create additional issues with student safety and impact classroom learning environments. The structures' long distance from the cafeteria and from the playground would require more personnel to supervise students. The separation of the two areas would also be difficult to supervise with the current staff limitations. Classrooms would be negatively affected by the noise because not everyone in nearby classes would be out for nutrition and lunch breaks at the same time.

If this option is chosen, another shade structure would have to be built in the kindergarten area as there is no shade structure there for the students to eat under and the two existing structures are too far from the kindergarten classrooms. The cost savings of rebuilding the two existing shade structures discussed above would likely be offset by the need to build an additional structure in the kinder yard.

- The other alternative is for a new structure where it is shown as item 4 in the Facilities Master Plan Concept Site Plan on the left side of the MPR. This should be the same cost as Megen's first choice but in a less desirable location. Another problem with this location is that a large structure here may interfere with emergency vehicle access. It also has the problem of being too far from the kindergarten area thereby also requiring an additional structure in the kindergarten area.

### **Parking and Student Drop-off**

The City is planning to improve Creston Road which will result in no parking being allowed on Creston Road. Currently many parents park there to drop off or pick up their children. In order to address this effective loss in drop-off utility it is suggested that additional parking be developed on-campus for staff parking. In particular, the area known as Pifer Park directly south of the MPR on the campus property line which was formerly a garden area and is currently bare ground is available to develop a staff parking lot. There is an existing access road to this area directly off the end of Rosemary/Patricia Lane. Moving staff parking to this area would free up spaces and room for drop-off both in the lot in front of the school as well as the parking lot accessed off Lana Street.

**Playing Fields**

The playing fields are generally fine and don't need any significant improvements.

**Other Items**

- Providing shade cover for the play structures in the kinder area would be very desirable. In hot weather they are unusable due to the surface temperatures of the structures. There is presently no shade in the kinder play area. The only trees are along the perimeter and provide shade for a border of bushes and dirt. Approximately 75% of the play area is covered with asphalt which increases the temperature substantially on hot days.
- During hot weather, there are constant issues with the HVAC systems not getting the classrooms cool enough which affects student learning. It is not known if this is due to the aging HVAC systems or thermostat functions being controlled at Maintenance Operations and Transportation Division. The air conditioning units are 25 years old and are frequently in need of repair.

**Appendix I-e  
Summary  
PRJUSD Facilities Master Plan Meeting  
Citizens Committee  
and  
Virginia Peterson Elementary Principal Maggie Tatman  
8-16-19**

Current enrollment is 420 students. Approximately 40% are English learners.

**Shade Structure**

This is Maggie's number one priority. There is currently no shade structure on the campus and one is badly needed for the students to eat outside when the weather is hot. It would be an additional benefit if the structure were rain proof but this is not essential. Smaller shade structures over the two climbing apparatus would also be very good as during hot weather they are not usable. The day the Citizens Committee visited the campus the slide on one structure was extremely hot.

The Multipurpose Room is used for lunch, assemblies, dance and some PE activities. Due to its limited size, it is necessary to schedule three 40 minute lunch periods which can lead to conflicts with other programs that utilize the MPR, thus the need for the shade structure for the students to eat under. Where it is shown in the Concept Site Plan in the Facilities Master Plan is the best location.

**ADA Issues in the flatwork and lack of a ramp to the playing fields**

These are both ADA issues and are the second priority to Maggie. Much of the flatwork between classrooms has slope that exceeds the allowed 2% and in areas is pitted and worn. An ADA ramp to the playing fields is badly needed. The school is taking on more and more medical fragile students over time who require the ramp to access the playing fields.

**HVAC**

This is the third priority. Many of the rooms are not adequately cooled or heated as necessary, likely since many of the units are likely original from when the campus was constructed in 1988.

**Roofs and Gutters**

During the rainy season there are problems with leaks from the roof and gutters. The buildings here have the same concealed gutters as does Pat Butler Elementary.

**Playing Field Renovation and Bus Drop-off**

There are issues here but they are not so major as to be a priority.

**Future Building**

The Concept Site Plan in the Facilities Master Plan shows two relocatables on the south boundary of the campus being removed with a new six classroom building constructed in front of where the two relocatables currently sit. Maggie would like the new building to be located where the two relocatables currently are. This would allow the area in front of the new building to be combined with adjacent vacant bare ground to be developed as needed play area

**Appendix I-f  
Summary  
PRJUSD Facilities Master Plan Meeting  
Citizens Committee  
and  
Bauer Speck Elementary Principal Shanna Ray  
and  
Manager of Facilities and Planning Cheryl Mollan  
8-5-19**

The situation at Bauer Speck is substantially different than at all the other campuses in that the design process is well advanced. The plans for Marie Bauer were submitted to the State some time ago for review and approval and those for Glen Speck have just recently been completed and submitted for review and approval. The ability of the Citizen's Committee to impact the process for Bauer Speck would therefore appear to be quite limited at this time.

The plans for the Glen Speck campus came back from the architects without the six additional classrooms that were contemplated.

Shanna and Cheryl both felt that a new multi-purpose room was essential as it would be an important asset in attracting students from elsewhere in the District who wished to benefit from the vision of Glen Speck being a premier Visual and Performing Arts school. The six additional classrooms could be accommodated through remodeling the existing MPR.

**Appendix I-g  
Summary  
PRJUSD Facilities Master Plan Meeting  
Citizens Committee  
and  
Daniel E. Lewis Middle School Principal Erin Haley  
8-02-19**

**HVAC AND ROOFS**

The HVAC systems in all buildings are a problem. Fixing them is the number one priority on the campus. This is the item receiving the most complaints from students, staff and parents as it is often difficult for the students to work during extremely hot weather in the spring and fall and students/staff find it necessary at times to wear heavy coats in winter with some teachers bringing extra coats for the students. The systems are old and total replacement may be necessary. It was suggested that having new, efficient systems in place would have a favorable impact on utility costs.

While not a wide-spread problem, there are roof leaks when it rains.

**NEW CLASSROOM REQUIREMENTS**

The expected fall enrollment is 799 students. The Facilities Master Plan says capacity is 836 and the previous Superintendent maintained it is 860. Erin says this is based on the previous Superintendent's position that since each teacher has one period a day for prep time (at which time their classroom has no students in it), other teachers could use these rooms during these prep periods, effectively increasing the school's capacity. Erin said this is fine in theory but is totally impractical.

Erin believes she needs is a net addition of two classrooms. A fundamental limiting factor in any increase in facilities is the limited size of the site.

- The current Facilities Master Plan contemplates replacing the front office building with a two story building which would include classrooms. The current single story front office building appears to meet the school's needs. From the perspective of operating the school there is no need to incur the expense of replacing it. (Erin concurs).

- It was discussed how a two story building at the front of the campus would present a more “Middle School” as opposed to “Elementary School” image. Erin’s quote was, “We are not trying to be pretty. We are trying to run a school.”
- If it proves necessary to add a two story classroom building to generate necessary classroom space one thought would be to demo the single story 202 – 205 building located just east of the front office building and construct a new two story classroom building there.
- If that is done it was suggested that the walkway between the front office building and the new building should be eliminated and the two buildings tied together.

#### **MULTI-PURPOSE ROOM**

- The multi-purpose room is totally inadequate. The school was originally an elementary school and the multi-purpose room does not meet the needs of an intermediate school.
- It has a maximum capacity of 270 for a campus with 600 students. When parents attend functions such as award ceremonies they have to stand. The only facility on campus that can accommodate the entire student population is the gym.
- The benches and tables (which are stored back into the walls) are sized for elementary students, not middle school students or adults. In addition the benches are a safety issue as they have a tendency to collapse if people sit at only one end of a bench.
- The speakers don’t work and the screen on the stage is a safety issue. It is lowered and raised by a rope-pulley system that leaves open the possibility that the screen, which is quite heavy, could be allowed to drop suddenly and injure someone below it.
- It may be possible to capture some additional space in the area of the building between the main room and the kitchen.

#### **GYM**

As noted above assemblies are held in the gym. Due to poor lighting conditions video presentations are extremely difficult. The audio system works poorly for a

student assembly or similar function. The City has made the gym at Centennial Park available to the school in the morning which has relieved capacity pressure.

#### **BAND, SCIENCE, MUSIC AND COMPUTER ROOMS AND LIBRARY**

There is no longer a computer room at the school and none is needed. All students have Chrome notebooks making a computer room redundant. All the other rooms noted above are functioning well with no additions or major modifications a priority.

#### **PARKING LOT AND DROP-OFF**

Drop-off and pick-up are a nuisance but not a priority for expenditures. The school is able to use an additional drop-off point in Centennial Park which relieves congestion at the front of the school. There is adequate parking for staff.

#### **OUTSIDE PUBLIC ADDRESS SYSTEM**

The current system doesn't work adequately.

#### **ALARM SYSTEM**

The alarm system is outdated and needs to be expanded to cover the entire campus.

**Appendix I-h  
Summary  
PRJUSD Facilities Master Plan Meeting  
Citizens Committee  
and  
George H. Flamson Middle School Principal Tim Vincent  
8-26-19**

**Enrollment**

Current enrollment : 729

**Shaded Weatherproof Eating Area**

There currently is no shaded eating area for the students to eat outside. Constructing one is Tim's top priority. The need is for an area to seat 200 – 300 students. He suggests it be in the current dirt area identified as ⑩ in the Concept Site Plan contained in the Facilities Master Plan. This item is not included on either Priority Lists A or B in the Facilities Master Plan.

**New Student Drop-off Area**

This is Tim's #2 priority. The current provision for student drop-off and pick-up both for busses and parents is totally inadequate consisting of an area that will accommodate only 3 – 4 cars on 24<sup>th</sup> Street. Tim suggests that the large building setback from Spring Street be utilized to develop a drop-off area for both cars and busses and possibly to develop additional short-term parking. From the back of the sidewalk on Spring Street to the bottom of the steps leading into the school is approximately 48 feet. The distance from the existing classrooms shown as ⑧ in the Concept Site Plan along Spring Street to the back of the sidewalk on 24<sup>th</sup> Street is approximately 280 ft. This yields an area of approximately 13,000 sq. ft. of area within which to locate a new drop-off and short-term parking area. This item is not included on either Priority Lists A or B in the Facilities Master Plan.

**Security**

The campus is currently totally open from the parking lot. This security issue needs to be addressed to include the new building currently being built that will house ten classrooms initially utilized by Bauer Speck. This item is not included on either Priority Lists A or B in the Facilities Master Plan

In addition the emergency evacuation route to the football stadium through the north area of the campus needs improvement.

**Locker Room Upgrade**

This item is included as a Priority List A project in the Facilities Master Plan and is needed both for the intermediate school and high school use of the stadium.

**Playing Fields Re-grade**

This is not a priority item to Tim. The playing fields are adequate as is. This item is listed as a Priority List A project in the Facilities Master Plan.

## Appendix II Paso Robles Joint Unified School District 2016 Facilities Master Plan New Classroom Construction Cost

	# of Clsrms	Sq Ft.	Sq/CR	\$/Sq. Ft.	Building Hard Cost		Utilities & Other Hard Costs		Design Contingency		Soft Costs		Total Cost (1)	
					\$	Cost/CR	\$	\$	\$	\$	\$	\$/Sq. Ft.		
Pat Butler	4	3,480	870	350	1,218,000	304,500	80,040	389,412	324,510	2,011,962	578			
Kermit King	6	6,000	1,000	350	2,100,000	350,000	287,000	716,100	596,750	3,699,850	617			
Georgia Brown	10	12,112	1,211	350	4,239,200	423,920	535,676	1,432,463	1,193,719	7,401,058	611			
Winifred Pifer	0				0									
Virginia Peterson	6	5,582	930	350	1,953,700	325,617	270,211	667,176	555,978	3,447,065	618			
Marie Bauer	10	13,950	1,395	350	4,882,500	488,250	1,483,675 (2)	1,831,853	1,526,544	9,724,572	697			
Glen Speck	20	21,262	1,063	350	7,441,700	372,085	692,157	2,456,657	2,033,465	12,623,979 (3)	594			
Daniel E. Lewis														
Two Story	10	11,000	1,100	375	4,125,000	412,500	496,250	1,386,375	1,155,313	7,162,938	651			
One Story	5	8,723	1,745	350	3,053,050	610,610	388,292	1,032,402	860,335	5,334,079	611			
George H. Flannson	9	9,305	1,034	350	3,256,750	361,861	435,803	1,107,766	923,138	5,723,457	615			
	80	91,414			32,269,900		4,669,104	11,020,204	9,169,752	57,128,960	625			
Total cost per classroom						403,374	58,364	137,753	114,622	714,112				

(1) Excluding furniture

(2) There is an error in the Master Plan document. Landscaping cost of \$260,000 was omitted from the total.

(3) There is an error in the Master Plan document. New furniture costs of \$130,000 are not included in the total.

**Appendix III**  
**Analysis of Classroom Construction Costs**  
**2016 FMP and Ten-Classroom Flamson Building**

2016 FMP	# of Classrooms	Sq. Ft		\$
Pat Butler	4	3,480	\$	2,011,962
Kermit King	6	6,000	\$	3,699,850
Winfred Pifer	0	-	\$	-
Virginia Peterson	6	5,582	\$	3,447,065
Daniel E. Lewis Middle School				
One Story	5	4,792 (1)	\$	2,928,048
Two Story	10	11,000	\$	7,160,000
George H. Flamson Middle School	9	9,305	\$	5,723,457
	40	40,159	\$	24,970,382

Cost per sq. ft. 2016 FMP  
\$ 622

**Flamson Ten-Classroom Building, under construction**

Construction contract	10	13,789	\$	5,297,000
Add 15% contingency not in the contract			\$	794,550
Total Hard Costs			\$	6,091,550
Hard Costs per sq. ft.			\$	442
Plus 25% non-construction (soft costs)			\$	110
Cost per sq. ft. 10-Classroom Flamson Bldg.			\$	552

Reduced Projected FMP Classroom construction cost  
 (\$622 - \$552) \* 40,159 sq. ft equals  
 \$ 2,800,000

**Appendix IV  
Cost Assumptions and Calculations**

Impact on Costs	
Increase	Decrease

**Calculation Errors in the 2016 Facilities Master Plan**

In the Marie Bauer Pre-school budget contained in the 2016 Facilities Master Plan there were two arithmetic errors: Landscaping was included as a Priority List A item but the \$260,000 cost was not included in the total cost. Likewise New Furniture was included as a Priority List A item but the \$130,000 cost was not included in the total cost.

\$ 390,000

**District-wide allowance to renovate HVAC systems**

The District received an estimate from LEAF Engineers of hard costs to supply each classroom with a 4-ton replacement unit complete with ductwork, controls and a control panel. After including 20% for soft costs this results in an estimated cost of \$550,000 for Pat Butler. As Pat Butler consists of a total of 32,633 sq. ft. of buildings this is \$16.85 per sq. ft. The Committee expects that Butler, Peterson, Pifer and Lewis, comprising a total of 191,421 sq ft, require extensive renovation if not total HVAC system replacement. Using a more conservative \$20.00 per sq. ft for this work results in a total estimated cost of \$3,900,000.

\$ 3,900,000

Brown, Bauer and Speck will undergo major or total renovation and the cost of new HVAC systems is presumed to be in the current 2016 FMP. Flamson and King have not indicated major problems with their current systems.

**Eliminate Field Renovations, all campuses**

Pat Butler	\$	500,000
Kermit King	\$	380,000
Georgia Brown	\$	430,000
Winifred Pifer	\$	280,000
Virginia Peterson	\$	380,000
Marie Bauer Preschool	\$	-
Glen Speck	\$	760,000
Daniel E. Lewis Middle School	\$	-
George H. Flamson Middle School	\$	<u>660,000</u>

\$ 3,390,000

**Classroom Construction Costs**

The total cost (Hard costs, soft costs, contingency) contained in the 2016 Facilities Master Plan for 40 classrooms to be built at Butler, Kermit King, Pifer, Peterson, Lewis and Flamson is \$622 per sq. ft. The experience at Flamson building a ten-classroom building indicates a figure of \$552 per sq. ft. is more appropriate. See Appendix III for a detailed calculation.

\$ 2,800,000

**Pat Butler Elementary**

Shade Structure: 2850 sq ft (the size of the existing structure at Kermit King which allows 200 students to be seated for eating) times \$155 per sq. ft. which is the total cost per sq. ft. included in the 2016 FMP

\$ 440,000

**Georgia Brown Dual Immersion Magnet School**

The Committee recommends several additions and deletions to parking, campus access, student drop-off and bus drop-off but no overall cost reductions or increases to the FMP are recommended.

The Committee does not recommend that a new MPR be included for Brown in the revised FMP at this time. However it is being included in a list at the end of this report of highly desirable projects recommended to be built if funding can be secured.

**Winifred Pifer Elementary**

Construct shade structure for 200 students: 2850 sq. ft. @ \$155 per sq. ft.

\$ 440,000

Cover two climbing apparatus with cloth shade structures. Cost estimate provided by Brad Pawlowski.

\$ 80,000

**Virginia Peterson Elementary**

Construct shade structure for 200 students: 2850 sq. ft. @ \$155 per sq. ft.

\$ 440,000

Cover two climbing apparatus with cloth shade structures

\$ 80,000

**Marie Bauer Pre-School**

0

**Glen Speck Academy of Arts**

The Committee does not recommend that a new MPR be included for Speck in the revised FMP at this time. However it is being included in a list at the end of this report of highly desirable projects recommended to be built if funding can be secured.

0

**Daniel E. Lewis Middle School**

Retain rather than demolish and re-build the administration building  
The building is 3931 sq. ft. The total building cost per sq. ft. contained in the 2006 Facilities Master Plan is \$625 per sq. ft. (See Appendix II).  
The savings in retaining the building is 3931 times \$625 equals

\$ 2,450,000

Eliminate modernization of the Library

\$ 1,000,000

Eliminate Parking Lot and Drop-off Improvements

\$ 1,400,000

**George H. Flamson Middle School**

Construct shade structure for 200 students: 2850 sq. ft. @ \$155 per sq. ft.	\$ 440,000	\$ 440,000
Construct bus and automobile drop-off area in front of the Spring Street entry to the campus.	\$ 800,000	



# PASO ROBLES

JOINT UNIFIED SCHOOL DISTRICT  
THE DISTRICT OF EXCELLENCE

## 7-11 COMMITTEE ON SURPLUS DISTRICT PROPERTY

---

JANUARY 25, 2020



# DISPOSAL OF SURPLUS DISTRICT REAL PROPERTY

---

## Reasons for the Disposal of the Unused/Surplus School Site and Property

- There has been an expressed interest in the purchase of Whitley Gardens (Phillips) in the last 6-12 months
- The District does not have a current or future need for the Phillips site
- The Phillips site costs the District staff hours each year for upkeep
- The Phillips site location prohibits ease of use

## THE PROCESS

---

The District's governing board shall appoint a "District **advisory**" committee prior to the sale or lease of surplus property. (EC 17388)

Under California law (EC 17389), the Committee must have at least seven (7) members and no more than eleven (11) members and contain persons who can be representative of each of the following:

- The ethnic, age group and socioeconomic composition of the district;
- The business community, such as store owners, managers, or supervisors;
- Landowners or renters, with preference to be given to representatives of neighborhood associations;
- Teachers;
- Administrators;
- Parents of Students;
- Persons with expertise in environmental impact, legal contracts, building codes, and land use planning, including, but not limited to, knowledge of zoning an other land use restrictions of the cities and counties in which surplus space and real property is located.

## THE PROCESS

---

- Determine the amount of surplus space and real property
- Establish and circulate a priority list of use through the community
- Make a “final determination” of the limits of tolerance of use of the space and real property
- Forward a report to the District’s Board of Trustees recommending uses of surplus space and real property

## DUTIES OF THE 7-11 COMMITTEE

---

California law also designates the specific duties of a 7-11 Committee (Education Code § 17390) as follows:

- Review the projected school enrollment and other data as provided by the district to determine the amount of surplus space and real property;
- Establish a priority list of use of surplus space and real property that will be acceptable to the community;
- Cause to have circulated throughout the attendance area a priority list of surplus space and real property and provide for hearings or community input to the Committee on acceptable uses of space and real property, including the sale or lease of surplus real property for child care development purposes pursuant to Section 17458;
- Make a final determination of limits of tolerance of use of space and real property;
- Forward to the Board of Trustees a report recommending uses of surplus space and real property.

# SUMMARY OF BROWN ACT REQUIREMENTS

---

- Advance notice of meetings (at least 72 hours) must be provided.
- Special meetings can be called with only 24 hour notice.
- The agenda must contain a brief description of each item of business to be transacted.
- Agenda description must not be misleading.
- No action can be taken on items not on the agenda.
- Public testimony on items not on the agenda must be made available to the public but no action can be taken by the body.
- All decisions must be made at a regular, special or emergency meeting.
- Serial meetings (decisions made via phone calls, texts, etc.) are prohibited.

## DESCRIPTION OF SURPLUS DISTRICT REAL PROPERTY

---

- The Paso Robles Joint Unified School District acquired the approximate 10 acres on December 2004. The lot has three APN numbers. The Montebello property borders both city property and private residences.



## DESCRIPTION OF SURPLUS DISTRICT REAL PROPERTY

---



- The Phillips property has never officially been deeded to Paso Robles Joint Unified School District. The current deed reads "Phillips School District."
- The property consists of two separate APN numbers, with one parcel being 6.9 acres, and the other 3.01.
- The property has an onsite well and is not serviced by the local water company.
- The property has three two permanent buildings, one modular, and one well-tower/pumphouse

## DISPOSAL OF SURPLUS DISTRICT REAL PROPERTY

---

### Staff Recommendation Related to the Disposal of the Unused School Site Designated and Property

- Montebello Oaks –
- Confirm – Maintain possession of the property. Use to be determined in the future.
- Whitley Gardens (Phillips) –
- Recommendation – Begin the 7-11 Committee and process and bring forward a recommendation to the Board of Trustees at a future date.



## ATTACHMENT 6

### Aquatics Complex Options

In the last six months, every possible option for an aquatics complex has been thoroughly investigated, including a "field trip" to Hollister to an identical pair of pools which have been installed in the last year and follow-up contacts literally around the world. We have also reached out to other North County schools including Cuesta College to determine alternative sites. Administration is confident now in making the following recommendations.

#### Proposed Site:

The only long-term viable option is the site previously identified on the Paso Robles High School Campus.

#### Resale of Pools:

Resale of the pool will without a doubt cost the District substantial dollars upfront while leaving the District back at "square one" without an appropriate competitive aquatics facility which all parties agree is needed. While the purchase of the pool was inarguably premature and less expensive options should have been approved instead, moving forward to install what we have now at the PRHS site is really our only defensible option.

#### Cost of Installation:

Measure M allocated \$5.7M for the Aquatics Complex. The Facilities Master Plan Update has identified numerous projects at the existing six elementary and two middle schools which can be delayed or deleted. These savings, however, will if adopted by the Board, be more than offset by added needs at those sites for basic infrastructure and multi-purpose rooms. There thus will be no monies freed up for the aquatics complex.

The Citizens Oversight Committee has also made it explicitly and abundantly clear that they will NOT bless any allocation of Measure M monies beyond the original \$5.7M unless they are absolutely certain ALL basic needs have first been fully addressed at the sites that were the priority of the ballot measure.

The District has, however, applied for State Modernization funds which will become available in the not-too-distant future if Proposition 13 passes in March. If that happens, the District may allocate any of those funds to any project listed on the original measure including the Aquatics Complex, and that will be our recommendation. A total budget with contingencies would likely need to be in the \$13M range, meaning we would need the original \$5.7 plus another \$7-8M from modernization reimbursements. The Board may be able to accelerate the construction process if we receive certain guarantees on probability of future funds.



**PASO ROBLES**  
JOINT UNIFIED SCHOOL DISTRICT  
THE DISTRICT OF EXCELLENCE

SUPERINTENDENT: CURT DUBOST  
800 NIBLICK ROAD  
PASO ROBLES, CA 93446  
Tel: (805) 769-1000 Fax: (805) 237-3339  
WWW.PASOSCHOOLS.ORG

Maintenance and Operations

The next concern has always been the high cost of maintenance and operations of the pools once they are installed. Based on research and personal contacts with San Benito USD in Hollister, we are confident in a number of \$400K per year in cost. The District is proposing a "four-legged stool" of support for that purpose. The District would increase its budget for Aquatics from its current \$72K to \$100K. Swim Paso has committed to raising through usage fees the amount of \$100K per year, a number which is less than the \$120,000 per year that San Benito is projecting for outside income.

A third leg could be the County of San Luis Obispo and a fourth the City of Paso Robles. Meetings have been held with Supervisor Peschong and with Mayor Steve Martin and City Manager Tom Frutchey. Neither entity can make any firm commitments of any kind but both were receptive to our plans and promised to explore all options following the November elections when they will know better what their sources of new and ongoing income may be.



MEASURE M PROJECT &  
MASTERPLAN UPDATE

January 25, 2020



# MEASURE M BALLOT LANGUAGE

## EXHIBIT B

### BALLOT MEASURE ABBREVIATED FORM

To repair, acquire, upgrade, equip and construct school classrooms and facilities including science, technology, engineering, arts, and math classrooms; expand career technical education; replace aging portables, fix leaky roofs, repair deteriorating plumbing/ electrical wiring; and improve building earthquake safety, shall the School Facilities Improvement District No.1 of Paso Robles Joint Unified School District be authorized to issue \$95,000,000 of bonds with legal interest rates, independent citizens' oversight, annual audits, all funds spent on local schools and not for administrator salaries or taken by the State?

Bonds—Yes

Bonds—No

# CURRENT PROJECT LIST

- Masterplan was developed in 2016
- Project list approved October 10, 2017
- No updates as of today
- Flat to declining enrollment requires changes to the masterplan
- Focus of 2017 project list -
  - Replacing relocatable classrooms
  - Construction of 80 new classrooms and demolition of 46 relocatable
  - Playfield renovation
  - Parking lot / drop off improvements

Per 2018 Developer Fee Justification Study

School Level <sup>(1)</sup>	2018/2019 Facilities Capacity <sup>(2)</sup>	2018/2019 Student Enrollment <sup>(3)</sup>	Excess/ (Shortage) Capacity
Elementary School (Grades K-6)	3,672	3,431	241
Middle School (Grades 7-8)	1,210	993	217
High School (Grades 9-12)	2,719	2,382	337
Total	7,601	6,806	795



## Total Program Cost

<u>School Site</u>	<u>Potential Priority List A</u>
Pat Butler	\$3,720,000
Kermit King	\$4,170,000
Georgia Brown	\$13,850,000
Winifred Pifer	\$590,000
Virginia Peterson	\$4,590,000
Marie Bauer	\$11,080,000
Glen Speck	\$21,980,000
Daniel Lewis	\$16,750,000
George Flamson	\$12,567,000
Aquatics Complex	\$5,700,000
<b>TOTAL</b>	<b>\$94,997,000</b>

## FUNDING ALLOCATION APPROVED OCT, 2017

- This allocation did not breakdown construction costs, soft costs, or architect fees.
- This allocation did not include a specific project for the Temporary Campus
- This allocation did not include the costs for project manager, or program operational costs (Colbi software, advertising, legal, etc.)



# PROJECT LIST — FLAMSON CLASSROOM

## George H. Flamson Middle School

Acres: 20.2 Acres, 19 usable, 12.3 useable less parking and stadium

Current Enrollment: 680

Projected Enrollment 2022: 836

School Size Capacity: 836

Class Size Average: 32

Classroom Space: 35 Base Classrooms

Including: (3) Learning Center Rooms, Art Room, Band Room, Choir Room, Dance Room, Opportunity Room, Professional Development Room

2 Relocatables: (2) Campus Connection Rooms

### Potential Priority List A:

- |   |                     |
|---|---------------------|
| 1. 9 New Classrooms:                                  | \$5,720,000         |
| 2. Demolish Antiquated Buildings (9):                 | \$357,000           |
| 3. Major Modernization Classrooms:                    | \$650,000           |
| 4. Replace Locker Rooms, Fitness and Wrestling Rooms: | \$5,180,000         |
| 5. Re-grade Fields:                                   | \$660,000           |
| <b>Total Projected Cost:</b>                          | <b>\$12,567,000</b> |

- Project bid January 8, 2019
- Project awarded January 22, 2019
- \$5,297,000 (Construction costs only)
  - Estimate the actual cost will be close to \$6,500,000 (including architect fees, soft costs, etc.)
- Additional Work
  - Demolish antiquated buildings
  - Cafeteria update
  - Shade structure
  - Roof replacement
  - Infrastructure upgrades
    - (Fire alarms, EMS, PA, E-rate)
- Update funding allocation

# PROJECT LIST -- MARIE BAUER

## Marie Bauer Preschool

Acreage: 2.5 Acres, 2.30 usable, 1.9. useable less parking

Current Enrollment: 188

Projected Enrollment 2022: TBD

School Size Capacity: TBD (based on programming)

Class Size Average: 25

Classroom Space: 10 Classrooms

Including: Office/Support/Parent Center

- Project bid September 19, 2019
- Project awarded October 8, 2019
- \$10,513,428 (Construction costs only)
  - Estimate the actual cost will be close to \$12,800,000 (including architect fees, soft costs, etc.)

### Potential Priority List A:

1. Remove Existing Buildings:
2. Parking and Drop-off.
3. Ten New Classrooms and Support:
4. New Play Area:
5. New Parking:

\$520,000

\$280,000

\$9,640,000

\$350,000

\$290,000

\$11,080,000

Total Projected Cost:



# PROJECT LIST — GLEN SPECK

## Glen Speck Academy of the Arts

Acreage: 9.24 Acres, 9 usable, 8.5 useable less parking  
 Current Enrollment: 512  
 Projected Enrollment 2022: 661.  
 School Size Capacity: 588  
 Class Size Average: 28

### Classroom Space: 29 Base Classrooms

Including: (2) Learning Center Rooms, VAPA Room, STEAM Room, Dance Room, Music Room, Professional Development, Keyboarding Room

- Project bid September 19, 2019
- Project awarded January 25, 2020
- \$19,092,000
- Recommendation
  - Addition of new cafeteria / multi-purpose building
  - Addition of

### Potential Priority List A:

- |  |              |
|--|--------------|
| 1. 20 New Classrooms:                        | \$12,810,000 |
| 2. Remove 14 Relocatables:                   | \$110,000    |
| 3. Demolish Structures/Antiquated Buildings: | \$630,000    |
| 4. Major Modernization Library:              | \$630,000    |
| 5. Construct Computer Lab:                   | \$520,000    |
| 6. Student Restrooms:                        | \$310,000    |
| 7. School Office and Support:                | \$1,790,000  |
| 8. Renovate Fields:                          | \$760,000    |
| 9. Hard Court Improvements:                  | \$520,000    |
| 10. Parking and Drop-off:                    | \$1,110,000  |
| 11. Major Modernization:                     | \$2,490,000  |
| 12. Expand Hard Court:                       | \$290,000    |

Total Projected Cost: \$21,980,000

# PROJECT LIST – PAT BUTLER

## Pat Butler Elementary School

Acreage: 10.88 Acres, 9.0 usable, 8.0 useable less parking

Current Enrollment: 441

Projected Enrollment 2022: 571

School Size Capacity: 504

Class Size Average: 28

Classroom Space: 22 Base Classrooms

Including: Learning Center Room, VAPA Room, STEAM Room, Opportunity Room

4 Relocatables: (2) PRYDE After School Program Rooms, Professional Development Room, Keyboarding Room

- Recommendation -
- Shade Structure
- HVAC Upgrades
- Roofing Replacement
- Infrastructure upgrades
  - (Fire alarms, EMS, PA, E-rate)
- Stay within the current funding allocation

## Potential Priority List A:

1. Four New Classrooms: \$2,060,000
  2. ADA Compliance for Access from Blacktop to Field: \$200,000
  3. Remove One Relocatable: \$10,000
  4. Re-grading Fields: \$500,000
  5. Student Drop-off, Reconfigure Parking and Retaining Wall: \$950,000
- Total Projected Cost: \$3,720,000



# PROJECT LIST – VIRGINIA PETERSON

## Virginia Peterson Elementary School

Acreage: 10.7 Acres, 9.8 usable, 9.0 useable less parking

Current Enrollment: 452

Projected Enrollment 2022: 579

School Size Capacity: 588

Class Size Average: 28

Classroom Space: 26 Base Classrooms

Including: (2) Learning Center Rooms, VAPA Room, STEAM Room, Keyboarding Room

4 Relocatables: (2) ASES After School Program Rooms, Professional Development, Campus Connection Room

- Recommendation -
- Shade Structure
- HVAC Upgrades
- Roofing Replacement
- Infrastructure upgrades
  - (Fire alarms, EMS, PA, E-rate)
- Stay within the current funding allocation

### Potential Priority List A:

1. Six New Classrooms: \$3,520,000
  2. Remove Two Relocatables: \$20,000
  3. Field Renovation: \$380,000
  4. Ramp to Playfields: \$20,000
  5. ADA – Flatwork Improvements: \$650,000
- Total Projected Cost: \$4,590,000



# PROJECT LIST - KERMIT KING

## Kermit King Elementary School

Acreage: 11.73 Acres, 11.66 usable, 10.62 useable less parking

Current Enrollment: 492

Projected Enrollment 2022: 604

School Size Capacity: 644

Class Size Average: 28

Classroom Space: 29 Base Classrooms

Including: (2) Learning Center Rooms, VAPA Room, STEAM Room, Keyboarding Room, SDC Kindergarten Room

2 Relocatables: (1) PRYDE After School Program Room, Professional Development Room

- Recommendation -
- HVAC Upgrades
- Infrastructure upgrades
  - (Fire alarms, EMS, PA, E-rate)
- Lighting and control upgrades
- Reduce allocation

## Potential Priority List A:

1. Six New Classrooms: \$3,780,000
  2. Remove One Relocatable: \$10,000
  3. Field Renovation: \$380,000
- Total Projected Cost: \$4,170,000



# PROJECT LIST — WINTERED PIFER

## Winifred Pifer Elementary School

Acreage: 14.5 Acres, 13.8 usable, 12.6 useable less parking

Current Enrollment: 439

Projected Enrollment 2022: 537

School Size Capacity: 560

Class Size Average: 28

Classroom Space: 25 Base Classrooms

Including: (2) Learning Center Rooms, VAPA Room, STEAM Room, Keyboarding Room

7 Relocatables; (4) ASES After School Program Rooms, Professional Development Room, (2) Campus Connection Rooms

- Recommendation -
- Shade Structure
- HVAC Upgrades
- Roofing Replacement
- Infrastructure upgrades
  - (Fire alarms, EMS, PA, E-rate)
- Increase allocation

### Potential Priority List A:

1. Renovate Current Shade Structure: \$220,000
  2. Renovate Fields: \$280,000
  3. Improve Student Drop-off: \$90,000
- Total Projected Cost: \$590,000





# PROJECT LIST — GEORGIA BROWN

## Georgia Brown Dual Immersion Magnet School

Acreage: 8.3 Acres, 7.23 usable, 6.85 useable less parking

Current Enrollment: 577

Projected Enrollment 2022: 644

School Size Capacity: 644

Class Size Average: 28

Classroom Space: 27 Base Classrooms

Including: Learning Center Room, VAPA Room, STEAM Room, Keyboarding Room

4 Relocatables: (2) PRYDE After School Program Rooms, First Five, Professional Development Room

- Recommendation -
- Modernize/Replace classrooms
- Infrastructure upgrades
  - (Fire alarms, EMS, PA, E-rate)
- Cafeteria upgrade
- Increase funding allocation

### Potential Priority List A:

1. 10 New Classrooms: \$7,540,000
2. Remove Six Relocatables: \$60,000
3. Renovate Fields: \$430,000
4. Modernize Kindergarten: \$2,150,000
5. Major Modernization: \$2,350,000
6. Expand Hard Court: \$700,000
7. Improve Student Drop-off: \$330,000
8. Improve Bus Drop-off: \$290,000

Total Projected Cost:

\$13,850,000



# PROJECT LIST — AQUATICS COMPLEX

## Aquatics Complex

- Future of Aquatics Complex
- Additional construction funding to be supplied from state matching funds

### Potential Priority List A:

1. 50 Meter Pool:
2. Pool Equipment Room:

\$5,210,000

\$490,000

Total Project Cost:

\$5,700,000

### Operational costs

- PRJUSD \$100,000
- City \$100,000
- County \$100,000
- Private \$100,000

### ▪ Recommendation

- No change to funding allocation at this time



# ELIGIBILITY OF FUNDING

## Paso Robles Joint Unified School District Modernization Eligibility Analysis

**SCHOOL  
FACILITY  
CONSULTANTS**

### DRAFT 2018-19 Modernization Eligibility

School Site	Eligibility	State Share	District Share	Total
Bauer-Speck Elementary	412	\$1,913,328	\$1,275,552	\$3,188,880
Kermit King Elementary	0	\$0	\$0	\$0
Georgia Brown Elementary	498	\$2,312,712	\$1,541,808	\$3,854,520
Pat Butler Elementary	467	\$2,168,748	\$1,445,832	\$3,614,580
Virginia Peterson Elementary	429	\$1,992,276	\$1,328,184	\$3,320,460
Winifred Pifer Elementary	462	\$2,203,377	\$1,468,918	\$3,672,295
Daniel E. Lewis Middle	567	\$2,785,104	\$1,856,736	\$4,641,840
George H. Flanson Middle	672	\$3,300,864	\$2,200,576	\$5,501,440
Liberty / Independence High	108	\$694,548	\$463,032	\$1,157,580
Paso Robles High	342	\$2,199,402	\$1,466,268	\$3,665,670
<b>TOTAL</b>	<b>3,957</b>	<b>\$19,570,359</b>	<b>\$13,046,906</b>	<b>\$32,617,265</b>

Updated to be based on grant amounts approved at the January 23, 2019 SAB meeting



# EXISTING BUDGET

- Construction = Hard costs for physical construction
- Soft Costs = DSA, Inspector, permits, etc.
- Contingency = Additional construction funds for unknown
- Architect = Fee based on construction and contingency
- Additional costs not budgeted
  - Facility Manager costs
  - Misc. operational costs
  - Purchasing Manager costs

**Measure M - Master Project Budget Worksheet**

*If changes are not made to project budget allocations*

Project Estimates	Construction	Soft Costs	Architect	Contingency
\$ 102,077,738	\$ 84,027,428	\$ 8,272,743	\$ 5,641,196	\$ 4,136,371

Facility Manager - Cheryl (9yrs)	\$ 3,310,000	Architect Master Fee		
Operational Costs (Total and Misc)	\$ 380,000	Soft costs include - DSA fees, testing fees, inspection, commissioning, legal fees, advertising		
Purchasing Manager (90%) (9yrs)	\$ 298,300	Contingency - Used as additional hard construction costs for unknowns		
Sub-total	\$ 1,988,300	This budget does not factor escalation. Estimated to be average of 8% over next three years.		
<b>Grand Total</b>	<b>\$ 102,735,738</b>			

	Total	Construction	Soft Costs	Architect	Contingency	Bid Price	Notes
1	Temporary Campus during modernization of Speck, Bauer, Brown (includes site work, bonding rental, 2 playground structures, 1 shade structure) installation of shade structure and additional restroom	\$ 1,300,000	\$ 1,300,000	\$ 8,115	\$ 9,950	\$ 119,000	Site Work measurable Rental (3 yr term) \$ 1,272,446
	Sub-Total	\$ 1,300,000	\$ 1,300,000	\$ 8,115	\$ 9,950	\$ 119,000	
2	Blamson MS Sch - 10 Classroom	\$ 5,400,000	\$ 5,400,000	\$ 368,227	\$ 270,000	\$ 5,297,000	construction costs with change orders is \$5.5M
	Sub-Total	\$ 5,400,000	\$ 5,400,000	\$ 368,227	\$ 270,000	\$ 5,297,000	
3	Maria Bauer Elem Sch (1955)	\$ 12,806,136	\$ 10,512,428	\$ 1,051,243	\$ 716,844	\$ 10,512,428	
	Sub-Total	\$ 12,806,136	\$ 10,512,428	\$ 1,051,243	\$ 716,844	\$ 10,512,428	
4	Glen Speck Elem Sch (1955)	\$ 23,257,886	\$ 19,093,100	\$ 1,909,200	\$ 1,301,886	\$ 19,093,100	
	Sub-Total	\$ 23,257,886	\$ 19,093,100	\$ 1,909,200	\$ 1,301,886	\$ 19,093,100	
5	Georgia Brown Elem Sch (1954)	\$ 13,876,458	\$ 11,350,000	\$ 1,135,000	\$ 773,958	\$ 11,350,000	
	Sub-Total	\$ 13,876,458	\$ 11,350,000	\$ 1,135,000	\$ 773,958	\$ 11,350,000	
6	Daniel Lewis MS Sch 74603	\$ 16,689,205	\$ 13,100,000	\$ 1,370,000	\$ 984,205	\$ 13,100,000	
	Sub-Total	\$ 16,689,205	\$ 13,100,000	\$ 1,370,000	\$ 984,205	\$ 13,100,000	
7	Pat Butler Elem Sch (1990)	\$ 3,715,480	\$ 3,050,000	\$ 305,000	\$ 207,980	\$ 3,050,000	
	Sub-Total	\$ 3,715,480	\$ 3,050,000	\$ 305,000	\$ 207,980	\$ 3,050,000	
8	Virginia Peterson Elem Sch (1988)	\$ 4,568,233	\$ 3,750,000	\$ 375,000	\$ 255,713	\$ 3,750,000	
	Sub-Total	\$ 4,568,233	\$ 3,750,000	\$ 375,000	\$ 255,713	\$ 3,750,000	
9	Kermit King Elem Sch (2001)	\$ 4,141,847	\$ 3,400,000	\$ 340,000	\$ 331,847	\$ 3,400,000	
	Sub-Total	\$ 4,141,847	\$ 3,400,000	\$ 340,000	\$ 331,847	\$ 3,400,000	
10	Winfred Pifer Elem Sch (1995)	\$ 589,604	\$ 484,000	\$ 48,400	\$ 33,004	\$ 484,000	
	Sub-Total	\$ 589,604	\$ 484,000	\$ 48,400	\$ 33,004	\$ 484,000	
11	Blamson MS Sch - Modernization	\$ 5,969,132	\$ 4,900,000	\$ 490,000	\$ 334,132	\$ 4,900,000	
	Sub-Total	\$ 5,969,132	\$ 4,900,000	\$ 490,000	\$ 334,132	\$ 4,900,000	
12	Aquatics Complex	\$ 5,688,948	\$ 4,670,000	\$ 467,000	\$ 318,448	\$ 4,670,000	Notes pools and completed clearing the site.
	Sub-Total	\$ 5,688,948	\$ 4,670,000	\$ 467,000	\$ 318,448	\$ 4,670,000	

# RECOMMENDATION

- If project funding allocations are NOT adjusted, the current project list and planned expenditures will exceed the budget.
- Develop new project budgets based on input from today
- Immediately start design of shade structure installation at:
  - Pat Butler
  - Virginia Peterson
  - Winifred Pifer
  - Flamson
- Immediately start design of HVAC and roof replacement at:
  - Pat Butler
  - Virginia Peterson
- Include E-rate project as part Measure M project
- Continue to develop partnerships with City, County, and private groups to secure operational funding for the aquatics complex
- Return to board with updated budget to reflect suggested changes





**Pat Butler Elementary School**

Acreage: 10.88 Acres, 9.0 usable, 8.0 useable less parking

Current Enrollment: 441

Projected Enrollment 2022: 571

School Size Capacity: 504

Class Size Average: 28

Classroom Space: 22 Base Classrooms

Including: Learning Center Room, VAPA Room, STEAM Room, Opportunity Room

4 Relocatables: (2) PRYDE After School Program Rooms, Professional Development Room, Keyboarding Room

**Potential Priority List A:**

- |  |                    |
|--|--------------------|
| 1. Four New Classrooms:                                      | <b>\$2,060,000</b> |
| 2. ADA Compliance for Access from Blacktop to Field:         | <b>\$200,000</b>   |
| 3. Remove One Relocatable:                                   | <b>\$10,000</b>    |
| 4. Re-grading Fields:  | <b>\$500,000</b>   |
| 5. Student Drop-off, Reconfigure Parking and Retaining Wall: | <b>\$950,000</b>   |

**Total Projected Cost: \$3,720,000**

**Potential Priority List B:**

- |                                      |                 |
|--------------------------------------|-----------------|
| 1. Move Ball Wall:                   | <b>\$40,000</b> |
| 2. Renovate Current Shade Structure: | <b>\$90,000</b> |

**Total Projected Cost: \$130,000**



## **Kermit King Elementary School**

Acreage: 11.73 Acres, 11.66 usable, 10.62 useable less parking

Current Enrollment: 492

Projected Enrollment 2022: 604

School Size Capacity: 644

Class Size Average: 28

Classroom Space: 29 Base Classrooms

Including: (2) Learning Center Rooms, VAPA Room, STEAM Room, Keyboarding Room, SDC Kindergarten Room

2 Relocatables: (1) PRYDE After School Program Room, Professional Development Room

### Potential Priority List A:

1. Six New Classrooms:	\$3,780,000
2. Remove One Relocatable:	\$10,000
3. Field Renovation:	\$380,000
<b>Total Projected Cost:</b>	<b>\$4,170,000</b>

### Potential Priority List B:

1. Renovate Current Shade Structure:	\$160,000
2. Student Drop-off, Reconfigure Parking:	\$130,000
<b>Total Projected Cost:</b>	<b>\$290,000</b>



## Georgia Brown Dual Immersion Magnet School

Acreage: 8.3 Acres, 7.23 usable, 6.85 useable less parking

Current Enrollment: 577

Projected Enrollment 2022: 644

School Size Capacity: 644

Class Size Average: 28

Classroom Space: 27 Base Classrooms

Including: Learning Center Room, VAPA Room, STEAM Room, Keyboarding Room

4 Relocatables: (2) PRYDE After School Program Rooms, First Five, Professional Development Room

### Potential Priority List A:

1. 10 New Classrooms:	\$7,540,000
2. Remove Six Relocatables:	\$60,000
3. Renovate Fields:	\$430,000
4. Modernize Kindergarten:	\$2,150,000
5. Major Modernization:	\$2,350,000
6. Expand Hard Court:	\$700,000
7. Improve Student Drop-off:	\$330,000
8. Improve Bus Drop-off:	\$290,000
<b>Total Projected Cost:</b>	<b>\$13,850,000</b>

### Potential Priority List B:

1. Renovate Current Shade Structure and Gazebo:	\$210,000
2. Construct New Library and MPR:	\$5,660,000
<b>Total Projected Cost:</b>	<b>\$5,870,000</b>



## Winifred Pifer Elementary School

Acreage: 14.5 Acres, 13.8 usable, 12.6 useable less parking

Current Enrollment: 439

Projected Enrollment 2022: 537

School Size Capacity: 560

Class Size Average: 28

Classroom Space: 25 Base Classrooms

Including: (2) Learning Center Rooms, VAPA Room, STEAM Room, Keyboarding Room

7 Relocatables: (4) ASES After School Program Rooms, Professional Development Room, (2) Campus Connection Rooms

### Potential Priority List A:

1. Renovate Current Shade Structure:	\$220,000
2. Renovate Fields:	\$280,000
3. Improve Student Drop-off:	\$90,000
<b>Total Projected Cost:</b>	<b>\$590,000</b>



## Virginia Peterson Elementary School

Acreage: 10.7 Acres, 9.8 usable, 9.0 useable less parking

Current Enrollment: 452

Projected Enrollment 2022: 579

School Size Capacity: 588

Class Size Average: 28

Classroom Space: 26 Base Classrooms

Including: (2) Learning Center Rooms, VAPA Room, STEAM Room, Keyboarding Room

4 Relocatables: (2) ASES After School Program Rooms, Professional Development, Campus Connection Room

### Potential Priority List A:

1. Six New Classrooms:	\$3,520,000
2. Remove Two Relocatables:	\$20,000
3. Field Renovation:	\$380,000
4. Ramp to Playfields:	\$20,000
5. ADA – Flatwork Improvements:	\$650,000
<b>Total Projected Cost:</b>	<b>\$4,590,000</b>

### Potential Priority List B:

1. Bus Drop-off:	\$290,000
<b>Total Projected Cost:</b>	<b>\$290,000</b>



**PASO ROBLES**  
JOINT UNIFIED SCHOOL DISTRICT  
THE DISTRICT OF EXCELLENCE

SUPERINTENDENT: CHRIS WILLIAMS  
800 NIBLICK ROAD  
PASO ROBLES, CA 93446  
Tel: (805) 769-1000 Fax: (805) 237-9339  
WWW.PASOSCHOOLS.ORG

## Marie Bauer Preschool

Acreage: 2.5 Acres, 2.30 usable, 1.9. useable less parking

Current Enrollment: 188

Projected Enrollment 2022: TBD

School Size Capacity: TBD (based on programming)

Class Size Average: 25

Classroom Space: 10 Classrooms

Including: Office/Support/Parent Center

### Potential Priority List A:

1. Remove Existing Buildings:	\$520,000
2. Parking and Drop-off:	\$280,000
3. Ten New Classrooms and Support:	\$9,640,000
4. New Play Area:	\$350,000
5. New Parking:	\$290,000

**Total Projected Cost: \$11,080,000**



**Glen Speck Academy of the Arts**

Acreage: 9.24 Acres, 9 usable, 8.5 useable less parking

Current Enrollment: 512

Projected Enrollment 2022: 661

School Size Capacity: 588

Class Size Average: 28

Classroom Space: 29 Base Classrooms

Including: (2) Learning Center Rooms, VAPA Room, STEAM Room, Dance Room, Music Room, Professional Development, Keyboarding Room

**Potential Priority List A:**

1. 20 New Classrooms:	\$12,810,000
2. Remove 14 Relocatables:	\$110,000
3. Demolish Structures/Antiquated Buildings:	\$630,000
4. Major Modernization Library:	\$630,000
5. Construct Computer Lab:	\$520,000
6. Student Restrooms:	\$310,000
7. School Office and Support:	\$1,790,000
8. Renovate Fields:	\$760,000
9. Hard Court Improvements:	\$520,000
10. Parking and Drop-off:	\$1,120,000
11. Major Modernization:	\$2,490,000
12. Expand Hard Court:	\$290,000
<b>Total Projected Cost:</b>	<b>\$21,980,000</b>

**Potential Priority List B:**

1. Performing Arts/MPR (500 seat capacity):	\$8,910,000
<b>Total Projected Cost:</b>	<b>\$8,910,000</b>



**PASO ROBLES**  
JOINT UNIFIED SCHOOL DISTRICT  
THE DISTRICT OF EXCELLENCE

SUPERINTENDENT: CHRIS WILLIAMS  
800 NIBLICK ROAD  
PASO ROBLES, CA 93446  
Tel: (805) 769-1000 Fax: (805) 237-3339  
WWW.PASOSCHOOLS.ORG

## Daniel E. Lewis Middle School

Acreage: 9.7 Acres, 9.3 usable, 7.9 useable less parking

Current Enrollment: 757

Projected Enrollment 2022: 866

School Size Capacity: 836

Class Size Average: 32

Classroom Space: 35 Base Classrooms

Including: (3) Learning Center Rooms, Art Room, Dance Room, Choir Room, Band Room,  
Professional Development Room

### Potential Priority List A:

1. New Two Story Classroom Entry (10):	\$7,330,000
2. 5 New Classrooms:	\$5,470,000
3. Remove 2 Relocatables:	\$20,000
4. Demolish Antiquated Buildings (5):	\$190,000
5. Modernization Library:	\$1,000,000
6. Modernize Restrooms:	\$430,000
7. Modernize Locker Rooms:	\$910,000
8. Parking Drop-off:	\$1,400,000
<b>Total Projected Cost:</b>	<b>\$16,750,000</b>

### Potential Priority List B:

1. Multipurpose Room/Computer Lab:	\$1,330,000
2. Expand Library:	\$390,000
<b>Total Projected Cost:</b>	<b>\$1,720,000</b>



**George H. Flamson Middle School**

Acreage: 20.2 Acres, 19 usable, 12.3 useable less parking and stadium

Current Enrollment: 680

Projected Enrollment 2022: 836

School Size Capacity: 836

Class Size Average: 32

Classroom Space: 35 Base Classrooms

Including: (3) Learning Center Rooms, Art Room, Band Room, Choir Room, Dance Room, Opportunity Room, Professional Development Room

2 Relocatables: (2) Campus Connection Rooms

**Potential Priority List A:**

1. 9 New Classrooms:	\$5,720,000
2. Demolish Antiquated Buildings (9):	\$357,000
3. Major Modernization Classrooms:	\$650,000
4. Replace Locker Rooms, Fitness and Wrestling Rooms:	\$5,180,000
5. Re-grade Fields:	\$660,000
<b>Total Projected Cost:</b>	<b>\$12,567,000</b>

**Potential Priority List B:**

1. New Cafeteria and Snack Bar:	\$5,420,000
<b>Total Projected Cost:</b>	<b>\$5,420,000</b>



**PASO ROBLES**  
JOINT UNIFIED SCHOOL DISTRICT  
THE DISTRICT OF EXCELLENCE

SUPERINTENDENT: CHRIS WILLIAMS  
800 NIBLICK ROAD  
PASO ROBLES, CA 93446  
Tel: (805) 769-1000 Fax: (805) 237-3339  
WWW.PASOSCHOOLS.ORG

## Aquatics Complex

### Potential Priority List A:

1. 50 Meter Pool:	\$5,210,000
2. Pool Equipment Room:	\$490,000
<b>Total Project Cost:</b>	<b>\$5,700,000</b>

### Potential Priority List B:

1. 25 Meter Lap Pool:	\$1,050,000
2. Pool Deck:	\$890,000
3. Bleachers:	\$30,000
4. Concessions:	\$550,000
5. Changing Room, Locker Room:	\$1,410,000
6. Restrooms:	\$740,000
7. Solar Water Heating:	\$200,000
<b>Total Projected Cost:</b>	<b>\$4,870,000</b>



**PASO ROBLES**  
JOINT UNIFIED SCHOOL DISTRICT  
THE DISTRICT OF EXCELLENCE

SUPERINTENDENT: CHRIS WILLIAMS  
800 NIBLICK ROAD  
PASO ROBLES, CA 93446  
Tel: (805) 769-1000 Fax: (805) 237-3339  
WWW.PASOSCHOOLS.ORG

## Total Program Cost

<u>School Site</u>	<u>Potential Priority List A</u>	<u>Potential Priority List B</u>
Pat Butler	\$3,720,000	\$130,000
Kermit King	\$4,170,000	\$290,000
Georgia Brown	\$13,850,000	\$5,870,000
Winifred Pifer	\$590,000	\$0
Virginia Peterson	\$4,590,000	\$290,000
Marie Bauer	\$11,080,000	\$0
Glen Speck	\$21,980,000	\$8,910,000
Daniel Lewis	\$16,750,000	\$1,720,000
George Flamson	\$12,567,000	\$5,420,000
Aquatics Complex	\$5,700,000	\$4,870,000
<b>TOTAL</b>	<b>\$94,997,000</b>	<b>\$27,500,000</b>



### Measure M - Master Project Budget Worksheet

*If changes are not made to project budget allocations*

Project Estimates	Construction	Soft Costs	Architect	Contingency
\$ 102,077,738	\$ 84,027,428	\$ 8,272,743	\$ 5,641,196	\$ 4,136,371

		Misc Notes	
Facility Manager - Cheryl (9yrs)	\$ 1,310,000	Architect Master Fee	6.4943%
Operational Costs (Colbi and Misc)	\$ 380,000	Soft costs include - DSA fees, testing labs, inspection, commissioning, legal fees, advertising	10%
Purchasing Manager (30%) (9yrs)	\$ 298,300	Contingency - Used as additional hard construction costs for unknowns	5%
<b>Sub-total</b>	<b>\$ 1,988,300</b>	This budget does not factor escalation. Estimated to be average of 8% over next three years.	
<b>Grand Total</b>	<b>\$ 102,735,774</b>		

	Temporary Campus	Total	Construction	Soft Costs	Architect	Contingency	Bid Price	Notes
1	Temporary Campus during modernization of Speck, Bauer, Brown	\$ 2,801,837	\$ 2,300,000	\$ 230,000	\$ 156,837	\$ 115,000	\$ 2,299,317	Site Work Relocatable Rental (3 yr term)
	(Includes site work, building rental, 2 playground structures, 1 shade structure)	\$ 1,300,000	\$ 1,300,000				\$ 1,272,446	
	Installation of shade structure and additional restroom.	\$ 144,965	\$ 119,000	\$ 11,900	\$ 8,115	\$ 5,950	\$ 119,000	
	<b>Sub Total</b>	<b>\$ 4,246,802</b>	<b>\$ 3,719,000</b>	<b>\$ 241,900</b>	<b>\$ 164,952</b>	<b>\$ 120,950</b>	<b>\$ 3,690,763</b>	

	Flamson MS Sch - 10 Clsrm Wing	Total	Construction	Soft Costs	Architect	Contingency	Bid Price	Notes
2	79664	\$ 6,578,227	\$ 5,400,000	\$ 540,000	\$ 368,227	\$ 270,000	\$ 5,297,000	Current constructions costs with change orders is \$5.5 M

	Maria Bauer Elem Sch (1955)	Total	Construction	Soft Costs	Architect	Contingency	Bid Price	Notes
3	53826	\$ 12,806,136	\$ 10,512,428	\$ 1,051,243	\$ 716,844	\$ 525,621	\$ 10,512,428	

	Glen Speck Elem Sch (1955)	Total	Construction	Soft Costs	Architect	Contingency	Bid Price	Notes
4	53826	\$ 23,257,686	\$ 19,092,000	\$ 1,909,200	\$ 1,301,886	\$ 954,600	\$ 1,909,200	

	Georgia Brown Elem Sch (1954)	Total	Construction	Soft Costs	Architect	Contingency	Bid Price	Notes
5	44310	\$ 13,826,458	\$ 11,350,000	\$ 1,135,000	\$ 773,958	\$ 567,500		

	Daniel Lewis MS Sch	Total	Construction	Soft Costs	Architect	Contingency	Bid Price	Notes
6	74603	\$ 16,689,205	\$ 13,700,000	\$ 1,370,000	\$ 934,205	\$ 685,000		

	Pat Butler Elem Sch (1990)	Total	Construction	Soft Costs	Architect	Contingency	Bid Price	Notes
7	32633	\$ 3,715,480	\$ 3,050,000	\$ 305,000	\$ 207,980	\$ 152,500		

	Virginia Peterson Elem Sch (1989)	Total	Construction	Soft Costs	Architect	Contingency	Bid Price	Notes
8	36710	\$ 4,568,213	\$ 3,750,000	\$ 375,000	\$ 255,713	\$ 187,500		

	Kermit King Elem Sch (2001)	Total	Construction	Soft Costs	Architect	Contingency	Bid Price	Notes
9	41023	\$ 4,141,847	\$ 3,400,000	\$ 340,000	\$ 231,847	\$ 170,000		

	Winifred Pifer Elem Sch (1995)	Total	Construction	Soft Costs	Architect	Contingency	Bid Price	Notes
10	47475	\$ 589,604	\$ 484,000	\$ 48,400	\$ 33,004	\$ 24,200		

	Flamson MS Sch - Modernization	Total	Construction	Soft Costs	Architect	Contingency	Bid Price	Notes
11		\$ 5,969,132	\$ 4,900,000	\$ 490,000	\$ 334,132	\$ 245,000		

	Aquatics Complex	Total	Construction	Soft Costs	Architect	Contingency	Bid Price	Notes
12		\$ 5,688,948	\$ 4,670,000	\$ 467,000	\$ 318,448	\$ 233,500	\$945,000 + \$362,828 = \$1,307,828	pools and completed clearing the site.



**Paso Robles Joint Unified School District  
Modernization Eligibility Analysis**



**DRAFT 2018-19 Modernization Eligibility**

School Site	Eligibility	State Share	District Share	Total
Bauer-Speck Elementary	412	\$1,913,328	\$1,275,552	\$3,188,880
Kermit King Elementary	0	\$0	\$0	\$0
Georgia Brown Elementary	498	\$2,312,712	\$1,541,808	\$3,854,520
Pat Butler Elementary	467	\$2,168,748	\$1,445,832	\$3,614,580
Virginia Peterson Elementary	429	\$1,992,276	\$1,328,184	\$3,320,460
Winifred Pifer Elementary	462	\$2,203,377	\$1,468,918	\$3,672,295
Daniel E. Lewis Middle	567	\$2,785,104	\$1,856,736	\$4,641,840
George H. Flamson Middle	672	\$3,300,864	\$2,200,576	\$5,501,440
Liberty / Independence High	108	\$694,548	\$463,032	\$1,157,580
Paso Robles High	342	\$2,199,402	\$1,466,268	\$3,665,670
<b>TOTAL</b>	<b>3,957</b>	<b>\$19,570,359</b>	<b>\$13,046,906</b>	<b>\$32,617,265</b>

Updated to be based on grant amounts approved at the January 23, 2019 SAB meeting

# Paso Robles Joint Unified School District Modernization Eligibility Analysis



## DRAFT 2018/19 Modernization Eligibility Review

Bauer-Speck Elementary	K-6	7-8	9-12	NS-SDC	S-SDC	Total
Draft 2018/19 Eligibility	486	0	0	0	0	486
57/ 75457-00-002	(74)	0	0	0	0	(74)
<b>Remaining Estimated Eligibility</b>	<b>412</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>412</b>
Estimated State Funding (60%)	\$1,913,328	\$0	\$0	\$0	\$0	\$1,913,328
Estimated District Match (40%)	\$1,275,552	\$0	\$0	\$0	\$0	\$1,275,552
<b>Total Estimated Funding (100%)</b>	<b>\$3,188,880</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$3,188,880</b>

Update for Facility Turnover.

Kermit King Elementary	K-6	7-8	9-12	NS-SDC	S-SDC	Total
No Baseline	0	0	0	0	0	0
No Projects	0	0	0	0	0	0
<b>Remaining Estimated Eligibility</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Estimated State Funding (60%)	\$0	\$0	\$0	\$0	\$0	\$0
Estimated District Match (40%)	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Estimated Funding (100%)</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

Kermit King Elementary will generate eligibility in 2022/2023 depending on facilities on site.

Georgla Brown Elementary	K-6	7-8	9-12	NS-SDC	S-SDC	Total
Draft 2018/19 Eligibility	660	0	0	0	0	660
57/ 75457-00-003	(162)	0	0	0	0	(162)
<b>Remaining Estimated Eligibility</b>	<b>498</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>498</b>
Estimated State Funding (60%)	\$2,312,712	\$0	\$0	\$0	\$0	\$2,312,712
Estimated District Match (40%)	\$1,541,808	\$0	\$0	\$0	\$0	\$1,541,808
<b>Total Estimated Funding (100%)</b>	<b>\$3,854,520</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$3,854,520</b>

Updated for 2018/19 CBEDS and facility turnover.

Pat Butler Elementary	K-6	7-8	9-12	NS-SDC	S-SDC	Total
Draft 2018/19 Eligibility	467	0	0	0	0	467
No Projects	0	0	0	0	0	0
<b>Remaining Estimated Eligibility</b>	<b>467</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>467</b>
Estimated State Funding (60%)	\$2,168,748	\$0	\$0	\$0	\$0	\$2,168,748
Estimated District Match (40%)	\$1,445,832	\$0	\$0	\$0	\$0	\$1,445,832
<b>Total Estimated Funding (100%)</b>	<b>\$3,614,580</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$3,614,580</b>

Virginia Peterson Elementary	K-6	7-8	9-12	NS-SDC	S-SDC	Total
Draft 2018/19 Eligibility	429	0	0	0	0	429
No Projects	0	0	0	0	0	0
<b>Remaining Estimated Eligibility</b>	<b>429</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>429</b>
Estimated State Funding (60%)	\$1,992,276	\$0	\$0	\$0	\$0	\$1,992,276
Estimated District Match (40%)	\$1,328,184	\$0	\$0	\$0	\$0	\$1,328,184
<b>Total Estimated Funding (100%)</b>	<b>\$3,320,460</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$3,320,460</b>

Establish Baseline.

# Paso Robles Joint Unified School District Modernization Eligibility Analysis



## DRAFT 2018/19 Modernization Eligibility Review

Winifred Pifer Elementary	K-6	7-8	9-12	NS-SDC	S-SDC	Total
Draft 2018/19 Eligibility	451	0	0	11	0	462
No Projects	0	0	0	0	0	0
<b>Remaining Estimated Eligibility</b>	<b>451</b>	<b>0</b>	<b>0</b>	<b>11</b>	<b>0</b>	<b>462</b>
Estimated State Funding (60%)	\$2,094,444	\$0	\$0	\$108,933	\$0	\$2,203,377
Estimated District Match (40%)	\$1,396,296	\$0	\$0	\$72,622	\$0	\$1,468,918
<b>Total Estimated Funding (100%)</b>	<b>\$3,490,740</b>	<b>\$0</b>	<b>\$0</b>	<b>\$181,555</b>	<b>\$0</b>	<b>\$3,672,295</b>

Daniel E. Lewis Middle	K-6	7-8	9-12	NS-SDC	S-SDC	Total
Draft 2018/19 Eligibility	0	567	0	0	0	567
No Projects	0	0	0	0	0	0
<b>Remaining Estimated Eligibility</b>	<b>0</b>	<b>567</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>567</b>
Estimated State Funding (60%)	\$0	\$2,785,104	\$0	\$0	\$0	\$2,785,104
Estimated District Match (40%)	\$0	\$1,856,736	\$0	\$0	\$0	\$1,856,736
<b>Total Estimated Funding (100%)</b>	<b>\$0</b>	<b>\$4,641,840</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$4,641,840</b>

Establish baseline.

George H. Flamson Middle	K-6	7-8	9-12	NS-SDC	S-SDC	Total
Draft 2018/19 Eligibility	0	837	0	0	0	837
57/ 75457-00-001	0	(165)	0	0	0	(165)
<b>Remaining Estimated Eligibility</b>	<b>0</b>	<b>672</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>672</b>
Estimated State Funding (60%)	\$0	\$3,300,864	\$0	\$0	\$0	\$3,300,864
Estimated District Match (40%)	\$0	\$2,200,576	\$0	\$0	\$0	\$2,200,576
<b>Total Estimated Funding (100%)</b>	<b>\$0</b>	<b>\$5,501,440</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$5,501,440</b>

Updated for facility turnover.

Liberty / Independence High	K-6	7-8	9-12	NS-SDC	S-SDC	Total
Draft 2018/19 Eligibility	0	0	108	0	0	108
No Projects	0	0	0	0	0	0
<b>Remaining Estimated Eligibility</b>	<b>0</b>	<b>0</b>	<b>108</b>	<b>0</b>	<b>0</b>	<b>108</b>
Estimated State Funding (60%)	\$0	\$0	\$694,548	\$0	\$0	\$694,548
Estimated District Match (40%)	\$0	\$0	\$463,032	\$0	\$0	\$463,032
<b>Total Estimated Funding (100%)</b>	<b>\$0</b>	<b>\$0</b>	<b>\$1,157,580</b>	<b>\$0</b>	<b>\$0</b>	<b>\$1,157,580</b>

Establish baseline.

Paso Robles High	K-6	7-8	9-12	NS-SDC	S-SDC	Total
Draft 2018/19 Eligibility Update	0	0	1,816	0	0	1,816
57/ 75457-00-005	0	0	(196)	0	0	(196)
57/ 75457-00-006	0	0	(1,278)	0	0	(1,278)
<b>Remaining Estimated Eligibility</b>	<b>0</b>	<b>0</b>	<b>342</b>	<b>0</b>	<b>0</b>	<b>342</b>
Estimated State Funding (60%)	\$0	\$0	\$2,199,402	\$0	\$0	\$2,199,402
Estimated District Match (40%)	\$0	\$0	\$1,466,268	\$0	\$0	\$1,466,268
<b>Total Estimated Funding (100%)</b>	<b>\$0</b>	<b>\$0</b>	<b>\$3,665,670</b>	<b>\$0</b>	<b>\$0</b>	<b>\$3,665,670</b>

Updated for facility turnover.

# Paso Robles Joint Unified School District Modernization Eligibility Analysis



## DRAFT 2018/19 Modernization Eligibility Review

All funding estimates are based on January 23, 2019 SAB Base Grant Amounts:

K-6 =\$4,644  
7-8 =\$4,912  
9-12 = \$6,431  
Non-Severe = \$9,903  
Severe = \$14,802

The estimates do not include any augmentations that a project may qualify for including but not limited to fire alarm/detection, small project, and/or ADA compliance.

**ATTACHMENT 13**

**PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT**  
**Enrollment Projection from Existing and New Residential Units**  
**School of Residence**

Elementary School Enrollment											
School of Residence	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
Bauer-Speck ES	429	413	380	379	374	375	377	375	371	368	366
Georgia Brown ES	466	490	509	513	504	523	519	514	509	504	501
Kermit King ES	419	405	390	361	349	334	345	362	375	387	399
Pat Butler ES	525	529	543	540	523	519	513	508	502	497	494
Virginia Peterson ES	374	374	385	392	412	413	441	455	465	472	480
Winifred Pifer ES	513	523	534	537	527	531	527	534	541	537	535
IDT	197	197	197	197	197	197	197	197	197	197	197
Unknown	5	5	5	4	3	2	1	0	0	0	0
<b>Total</b>	<b>2,928</b>	<b>2,935</b>	<b>2,942</b>	<b>2,923</b>	<b>2,889</b>	<b>2,895</b>	<b>2,920</b>	<b>2,944</b>	<b>2,960</b>	<b>2,962</b>	<b>2,972</b>

Middle School Enrollment											
School of Residence	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
Flamson MS	717	676	698	670	707	687	696	676	692	686	676
Lewis MS	712	683	666	704	723	759	738	740	723	736	743
IDT	120	120	120	120	120	120	120	120	120	120	120
Unknown	5	4	0	1	2	3	3	3	2	1	0
<b>Total</b>	<b>1,554</b>	<b>1,483</b>	<b>1,484</b>	<b>1,495</b>	<b>1,552</b>	<b>1,568</b>	<b>1,557</b>	<b>1,539</b>	<b>1,538</b>	<b>1,544</b>	<b>1,538</b>

High School Enrollment											
School of Residence	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
Paso Robles HS	2,253	2,323	2,338	2,362	2,378	2,350	2,401	2,424	2,480	2,482	2,463
IDT	119	119	119	119	119	119	119	119	119	119	119
Unknown	15	16	14	9	5	4	1	2	3	4	4
<b>Total</b>	<b>2,387</b>	<b>2,458</b>	<b>2,471</b>	<b>2,490</b>	<b>2,502</b>	<b>2,473</b>	<b>2,521</b>	<b>2,545</b>	<b>2,602</b>	<b>2,605</b>	<b>2,586</b>

Enrollment by Grade											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
Transitional	115	114	114	114	111	111	113	114	114	115	114
Kindergarten	431	429	431	431	423	427	435	441	445	447	446
1st Grade	462	450	453	453	455	449	454	463	466	469	470
2nd Grade	485	461	453	454	456	460	456	461	468	469	472
3rd Grade	492	502	481	472	475	479	483	478	482	486	487
4th Grade	478	491	505	481	474	478	483	488	482	483	487
5th Grade	465	488	505	518	495	490	495	500	503	494	495
6th Grade	497	464	489	507	519	500	494	499	503	504	495
7th Grade	498	501	472	496	515	528	510	504	508	510	511
8th Grade	559	518	523	493	518	540	553	536	527	530	532
9th Grade	591	663	616	645	598	628	656	667	659	641	644
10th Grade	619	583	659	611	641	596	626	655	664	654	635
11th Grade	594	605	574	646	601	632	588	618	645	651	641
12th Grade	583	606	621	588	663	618	650	606	635	660	666
<b>Total</b>	<b>6,869</b>	<b>6,876</b>	<b>6,896</b>	<b>6,909</b>	<b>6,943</b>	<b>6,936</b>	<b>6,998</b>	<b>7,028</b>	<b>7,100</b>	<b>7,111</b>	<b>7,097</b>

**PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT**  
 Enrollment Projections by Elementary School of Residence

Bauer-Speck ES											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
TK	18	18	18	18	17	17	17	17	17	17	17
00	69	68	68	67	65	66	67	66	66	66	65
01	69	67	66	66	66	65	65	65	65	65	64
02	60	61	60	59	59	59	58	58	58	58	57
03	56	58	59	58	57	57	58	56	56	56	56
04	87	53	55	56	55	55	55	55	53	53	53
05	70	88	54	55	56	56	56	56	56	54	53
<b>Total</b>	<b>429</b>	<b>413</b>	<b>380</b>	<b>379</b>	<b>374</b>	<b>375</b>	<b>377</b>	<b>375</b>	<b>371</b>	<b>368</b>	<b>366</b>

Georgia Brown ES											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
TK	15	15	15	15	14	14	14	14	14	14	14
00	80	80	81	80	78	78	79	78	78	77	77
01	63	81	82	82	82	80	79	80	79	79	78
02	92	64	84	84	84	84	81	81	81	80	80
03	76	92	65	84	84	85	84	81	81	81	80
04	76	80	98	69	89	90	89	88	86	85	85
05	64	78	83	101	71	92	92	91	91	88	87
<b>Total</b>	<b>466</b>	<b>490</b>	<b>509</b>	<b>513</b>	<b>504</b>	<b>523</b>	<b>519</b>	<b>514</b>	<b>509</b>	<b>504</b>	<b>501</b>

Kermit King ES											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
TK	21	21	21	21	20	20	20	21	21	22	22
00	51	51	51	50	49	50	52	55	57	59	61
01	69	51	51	51	50	50	52	55	58	60	61
02	62	70	51	51	51	52	53	56	58	60	62
03	77	61	68	50	50	51	53	55	57	59	61
04	69	82	64	72	54	55	57	59	61	63	65
05	70	70	83	66	74	56	58	61	63	64	66
<b>Total</b>	<b>419</b>	<b>405</b>	<b>390</b>	<b>361</b>	<b>349</b>	<b>334</b>	<b>345</b>	<b>362</b>	<b>375</b>	<b>387</b>	<b>399</b>

Pat Butler ES											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
TK	15	15	15	15	14	14	14	14	14	14	14
00	78	77	76	76	73	72	73	72	72	71	71
01	80	82	81	80	79	77	76	76	76	75	75
02	95	84	86	84	84	83	80	80	80	79	79
03	94	103	91	93	92	91	90	87	86	87	86
04	74	91	99	88	90	88	88	87	84	83	83
05	89	78	95	104	92	94	93	92	91	88	87
<b>Total</b>	<b>525</b>	<b>529</b>	<b>543</b>	<b>540</b>	<b>523</b>	<b>519</b>	<b>513</b>	<b>508</b>	<b>502</b>	<b>497</b>	<b>494</b>

PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT  
 Enrollment Projections by Elementary School of Residence

Virginia Peterson ES											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
TK	14	14	15	16	16	17	18	18	18	19	19
00	46	47	50	53	55	59	63	65	67	68	69
01	71	51	54	57	61	64	68	71	72	74	75
02	54	76	57	61	65	69	72	75	77	78	80
03	66	54	79	60	64	68	73	74	76	78	79
04	63	68	59	84	65	69	74	76	77	78	80
05	60	64	71	62	87	69	74	76	78	78	80
<b>Total</b>	<b>374</b>	<b>374</b>	<b>385</b>	<b>392</b>	<b>412</b>	<b>413</b>	<b>441</b>	<b>455</b>	<b>465</b>	<b>472</b>	<b>480</b>

Winifred Pifer ES											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
TK	21	21	21	21	20	20	20	20	20	19	19
00	80	80	79	79	76	76	76	77	79	79	78
01	75	84	83	83	82	80	79	81	83	83	82
02	93	78	87	86	86	85	83	84	86	86	86
03	85	96	80	90	90	89	88	88	89	89	89
04	80	87	99	83	92	92	92	93	92	92	92
05	79	78	85	96	80	89	89	91	92	89	89
<b>Total</b>	<b>513</b>	<b>523</b>	<b>534</b>	<b>537</b>	<b>527</b>	<b>531</b>	<b>527</b>	<b>534</b>	<b>541</b>	<b>537</b>	<b>535</b>

IDT											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
TK	10	10	10	10	10	10	10	10	10	10	10
00	26	26	26	26	26	26	26	26	26	26	26
01	34	34	34	34	34	34	34	34	34	34	34
02	28	28	28	28	28	28	28	28	28	28	28
03	37	37	37	37	37	37	37	37	37	37	37
04	29	29	29	29	29	29	29	29	29	29	29
05	33	33	33	33	33	33	33	33	33	33	33
<b>Total</b>	<b>197</b>										

Unknown											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
TK	1	0	0	0	0	0	0	0	0	0	0
00	1	1	0	0	0	0	0	0	0	0	0
01	1	1	1	0	0	0	0	0	0	0	0
02	1	1	1	1	0	0	0	0	0	0	0
03	1	1	1	1	1	0	0	0	0	0	0
04	0	1	1	1	1	1	0	0	0	0	0
05	0	0	1	1	1	1	1	0	0	0	0
<b>Total</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT  
 Enrollment Projections by Elementary School of Residence

Total Elementary School Enrollment											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
TK	115	114	114	114	111	111	113	114	114	115	114
00	431	429	431	431	423	427	435	441	445	447	446
01	462	450	453	453	455	449	454	463	466	469	470
02	485	461	453	454	456	460	456	461	468	469	472
03	492	502	481	472	475	479	483	478	482	486	487
04	478	491	505	481	474	478	483	488	482	483	487
05	465	488	505	518	495	490	495	500	503	494	495
<b>Total</b>	<b>2,928</b>	<b>2,935</b>	<b>2,942</b>	<b>2,923</b>	<b>2,889</b>	<b>2,895</b>	<b>2,920</b>	<b>2,944</b>	<b>2,960</b>	<b>2,962</b>	<b>2,972</b>

**PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT**  
**Enrollment Projections by Middle School of Residence**

Flamson MS											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
06	250	215	235	223	251	213	234	232	231	228	221
07	215	249	215	234	223	251	213	233	231	229	227
08	252	213	248	213	233	222	250	211	231	229	227
<b>Total</b>	<b>717</b>	<b>676</b>	<b>698</b>	<b>670</b>	<b>707</b>	<b>687</b>	<b>696</b>	<b>676</b>	<b>692</b>	<b>686</b>	<b>676</b>

Lewis MS											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
06	209	212	216	244	229	248	221	228	234	238	236
07	244	217	222	227	256	241	262	235	241	245	249
08	259	254	228	233	238	270	255	277	248	253	258
<b>Total</b>	<b>712</b>	<b>683</b>	<b>666</b>	<b>704</b>	<b>723</b>	<b>759</b>	<b>738</b>	<b>740</b>	<b>723</b>	<b>736</b>	<b>743</b>

IDT											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
06	38	38	38	38	38	38	38	38	38	38	38
07	35	35	35	35	35	35	35	35	35	35	35
08	47	47	47	47	47	47	47	47	47	47	47
<b>Total</b>	<b>120</b>										

Unknown											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
06	0	0	0	1	1	1	1	1	0	0	0
07	4	0	0	0	1	1	1	1	1	0	0
08	1	4	0	0	0	1	1	1	1	1	0
<b>Total</b>	<b>5</b>	<b>4</b>	<b>0</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>3</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>0</b>

Total Middle School Enrollment											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
06	497	464	489	507	519	500	494	499	503	504	495
07	498	501	472	496	515	528	510	504	508	510	511
08	559	518	523	493	518	540	553	536	527	530	532
<b>Total</b>	<b>1,554</b>	<b>1,483</b>	<b>1,484</b>	<b>1,495</b>	<b>1,552</b>	<b>1,568</b>	<b>1,557</b>	<b>1,539</b>	<b>1,538</b>	<b>1,544</b>	<b>1,538</b>

**PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT**

Enrollment Projections by High School of Residence

Paso Robles HS											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
09	554	629	579	612	565	595	622	633	625	607	610
10	587	552	631	580	614	569	599	627	636	626	607
11	560	572	542	617	569	604	560	590	616	622	612
12	552	569	585	553	631	583	619	575	604	628	634
<b>Total</b>	<b>2,253</b>	<b>2,323</b>	<b>2,338</b>	<b>2,362</b>	<b>2,378</b>	<b>2,350</b>	<b>2,401</b>	<b>2,424</b>	<b>2,480</b>	<b>2,482</b>	<b>2,463</b>

IDT											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
09	33	33	33	33	33	33	33	33	33	33	33
10	27	27	27	27	27	27	27	27	27	27	27
11	28	28	28	28	28	28	28	28	28	28	28
12	31	31	31	31	31	31	31	31	31	31	31
<b>Total</b>	<b>119</b>										

Unknown											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
09	4	1	4	0	0	0	1	1	1	1	1
10	5	4	1	4	0	0	0	1	1	1	1
11	6	5	4	1	4	0	0	0	1	1	1
12	0	6	5	4	1	4	0	0	0	1	1
<b>Total</b>	<b>15</b>	<b>16</b>	<b>14</b>	<b>9</b>	<b>5</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>4</b>

Total High School Enrollment											
Grade	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
09	591	663	616	645	598	628	656	667	659	641	644
10	619	583	659	611	641	596	626	655	664	654	635
11	594	605	574	646	601	632	588	618	645	651	641
12	583	606	621	588	663	618	650	606	635	660	666
<b>Total</b>	<b>2,387</b>	<b>2,458</b>	<b>2,471</b>	<b>2,490</b>	<b>2,502</b>	<b>2,473</b>	<b>2,521</b>	<b>2,545</b>	<b>2,602</b>	<b>2,605</b>	<b>2,586</b>