

Liberty Elementary School District

Board Meeting of the Board of Trustees

AGENDA

Liberty Elementary School

Library

1771 East Pacific Avenue. Tulare, CA 93274

Tuesday, February 13, 2024

6:00pm

1.0 Call to Order

2.0 Adopt Agenda (Action Item)

This item is provided as an opportunity for trustees, through consensus, to approve, re-sequence, or table agenda topics. In accordance with the Brown Act Requirements effective July 1, 2008, if documents are distributed to board members concerning an agenda item within 72 hours of a regular board meeting, at the same time the documents will be made available for public inspection at the District Office located at 1771 E. Pacific Ave. Tulare, CA 93274.

In compliance with the Americans with Disabilities Act and the Brown Act, if you need special assistance to participate in this meeting, including receipt of the agenda and documents in the agenda package in an alternate format, please contact the Liberty Elementary School District Office at (559) 686-1675. Notification 48 hours prior to the meeting will enable the district to make reasonable arrangements to ensure accessibility to this meeting (28CFR35.102-35, 104 ADA Title II), and allow for the preparation of documents in the appropriate alternate format.

3.0 Adjourn to Closed Session

The Board may adjourn to closed session to discuss matters of personnel security, negotiations, student discipline, litigation, or other matters as authorized by the government Code Section 3459.1, 5496.6 and 54967.6 and Ed Code Sections 35136 and 48913.

- a. **(Ed Code Section 35146, 48900) Student Discipline & Other Confidential Student Matters.**
- b. **(Gov. Code 54957) Public Employee Discipline/Dismissal/Release**
- c. **Gov. Code 54956.9) Significant Exposure to Litigation Pursuant to Government Code section 54956.9, subdivision (d)(2) or (3)**
- d. **Employment, resignations, transfers, etc. of Certificated and Classified Personnel**

6:30pm

4.0 Reconvene in Open Session

4.1 Flag Salute

4.2 Roll Call:	Ronald Koetsier	President
	Diane Tanner	Member
	John Beaver	Clerk
	Jill White	Member
	Jonathon Thorpe	Member

Also in attendance for Closed and Open Session: Deanna Cardoza (Superintendent).

BOARD GOALS

1. **Achieve high academic standards and meet the needs of all students in a safe and supportive environment.**
2. **Provide quality educational, extra-curricular, and athletic opportunities through exemplary activity programs.**
3. **Improve district organization, growth and capacity of facilities.**

- 4.3 **Board President** – Opportunity for Board President to comment or report on any matters pertinent or of concern to the Board.
 - a. **Board President to announce Closed Session Items of Discussion.**

- 4.4 **Public Comments:**

Those in the audience desiring to address the Board regarding items not on the agenda may do so at this time. Each speaker is to have (3) three minutes to address the Board and make a brief statement, express his/her viewpoint, or ask a question regarding matters related to the school system. Please understand that the Board does not take action on non-agenda items.

Speaker: Robert Aldaco, Liberty Teacher
Request to Address the Board Regarding Personal Leave of Absence

- 5.0 **Information Items:**

This item is provided for informational reports and will highlight district and student events and successes.
- 5.1 **Staff Reports** - Opportunity for Liberty Elementary School Staff Members to comment or report on any matters pertinent or of concern to the Board.
 - a. **Robbie Aldaco has requested to speak to the Board:**
- 5.2 **Principal** – Opportunity for Principal to comment or report on any matters pertinent or of concern to the Board.
- 5.3 **Superintendent** – Opportunity for Superintendent to comment or report on any matters pertinent or of concern to the Board.
- 5.4 **Reminder: Distribution 2023/2024 Statement of Economic Interests Form 700**
- 5.5 **Mid Year Update Liberty Elementary School District 2023-2024 Local Control Accountability Plan Year 2 Outcome**

- 6.0 **Action Items:**

These items are provided for Board information, discussion, and/or action.
- 6.1 **Approval of Consent Agenda**
 - *Minutes of Regular Board Meeting, January 09, 2024
 - *Payment of Warrants

- 6.2 Approval of Updated CSBA Board Policies for December 2023**
- 6.3 Approval of 2024-2025 School Calendar**
- 6.4 Approval of 2024 Ballot for CSBA Delegate Assembly**
- 6.5 Approval of 2022-2023 School Accountability Report Card (SARC)**
- 6.6 Approval of 2023-2024 Comprehensive School Safe Plan**
- 6.7 Approval of the 2023-2024 School Plan for Student Achievement**
- 6.8 Approval of Resolution 2023-2024-07 Regarding Non-Reelection and Release from Employment of Temporary Certificated Employees**

- Employee-1000080**
- Employee-1000081**
- Employee-1000082**
- Employee-1000083**
- Employee-1000084**
- Employee-1000085**

Adjourned _____

2023-2024 Statement of Economic Interests



Form 700

A Public Document

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Helpful Resources

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

California Fair Political Practices Commission

1102 Q Street, Suite 3050 • Sacramento, CA 95811

Email Advice: advice@fppc.ca.gov

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

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

December 2023

Quick Start Guide
Detailed instructions begin on page 3.

WHEN IS THE ANNUAL STATEMENT DUE?

- March 1 – Elected State Officers, Judges and Court Commissioners, State Board and Commission members listed in Government Code Section 87200
- April 2 – Most other filers

WHERE DO I FILE?

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

ITEMS TO NOTE!

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

NOTHING TO REPORT?

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

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

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

QUESTIONS?

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

E-FILING ISSUES?

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

What's New

Gift Limit Increase

The gift limit increased to **\$590** for calendar years **2023** and **2024**. The gift limit was \$520 for calendar years 2021 and 2022.

Who must file:

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

Exception:

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

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

Where to file:

87200 Filers

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

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

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

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

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

Candidates file as follow:

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

How to file:

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

When to file:

Annual Statements

⇒ March 1, 2024

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

⇒ April 2, 2024

- Most other filers

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

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

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

Assuming Office and Leaving Office Statements

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

Exception:

If you assumed office between October 1, 2023, and December 31, 2023, and filed an assuming office statement, you are not required to file an annual statement until March 1, 2025, or April 1, 2025, whichever is applicable. The annual statement will cover the day after you assumed office through December 31, 2024. (See Reference Pamphlet, page 6, for additional exceptions.)

Candidate Statements

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

Late Statements

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

Amendments

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

Types of Statements

Assuming Office Statement:

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

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

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

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

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

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

Annual Statement:

Generally, the period covered is January 1, 2023, through December 31, 2023. If the period covered by the statement is different than January 1, 2023, through December 31, 2023, (for example, you assumed office between October 1, 2022, and December 31, 2022 or you are combining statements), you must specify the period covered.

- Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement must be reported. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2023.

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

Leaving Office Statement:

Generally, the period covered is January 1, 2023, through the date you stopped performing the duties of your position. If the period covered differs from January 1, 2023, through the date you stopped performing the duties of your position (for example, you assumed office between October 1, 2022, and December 31, 2022, or you are combining statements), the period covered must be specified. The reporting period can cover parts of two calendar years.

- Report: Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2023.

Candidate Statement:

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

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

Amendments:

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

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

Expanded Statement:

If you hold multiple positions subject to reporting requirements, you may be able to file an expanded statement for each position, rather than a separate and distinct statement for each position. The expanded statement must cover all reportable interests for all jurisdictions and list all positions on the Form 700 or on an attachment for which it is filed. The rules and processes governing the filing of an expanded statement are set forth in Regulation 18723.1.

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

Please type or print in ink.

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

1. Office, Agency, or Court

Agency Name *(Do not use acronyms)*

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

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

Agency: Position:

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

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

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

- Annual:** The period covered is January 1, 2023, through December 31, 2023.
- Leaving Office:** Date Left ____/____/_____
(Check one circle.)
- or-** The period covered is ____/____/_____, through December 31, 2023.
- The period covered is January 1, 2023, through the date of leaving office.
- or-** The period covered is ____/____/_____, through the date of leaving office.
- Assuming Office:** Date assumed ____/____/_____
 Candidate: Date of Election _____ and office sought, if different than Part 1: _____

4. Schedule Summary (required) ► **Total number of pages including this cover page:** _____

Schedules attached

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

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

5. Verification

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

DAYTIME TELEPHONE NUMBER EMAIL ADDRESS
()

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

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

Date Signed _____
(month, day, year)

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

Instructions Cover Page

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

Part 1. Office, Agency, or Court

- Enter the name of the office sought or held, or the agency or court. Consultants must enter the public agency name rather than their private firm's name. (Examples: State Assembly; Board of Supervisors; Office of the Mayor; Department of Finance; Hope County Superior Court).
- Indicate the name of your division, board, or district, if applicable. (Examples: Division of Waste Management; Board of Accountancy; District 45). **Do not use acronyms.**
- Enter your position title. (Examples: Director; Chief Counsel; City Council Member; Staff Services Analyst).
- If you hold multiple positions (i.e., a city council member who also is a member of a county board or commission) you may be required to file separate and distinct statements with each agency. To simplify your filing obligations, in some cases you may instead complete a single expanded statement and file it with each agency.
 - The rules and processes governing the filing of an expanded statement are set forth in Regulation 18723.1. To file an expanded statement for multiple positions, enter the name of each agency with which you are required to file and your position title with each agency in the space provided. **Do not use acronyms.** Attach an additional sheet if necessary. Complete one statement disclosing all reportable interests for all jurisdictions. Then file the expanded statement with each agency as directed by Regulation 18723.1(c).

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

Example:

Brian Bourne is a city council member for the City of Lincoln and a board member for the Camp Far West Irrigation District – a multi-county agency that covers the Counties of Placer and Yuba. The City is located within Placer County. Brian may complete one expanded statement to disclose all reportable interests for both offices and list both positions on the Cover Page. Brian will file the expanded statement with each the City and the District as directed by Regulation 18723.1(c).

Part 2. Jurisdiction of Office

- Check the box indicating the jurisdiction of your agency and, if applicable, identify the jurisdiction. Judges, judicial candidates, and court commissioners have statewide jurisdiction. All other filers should review the Reference Pamphlet, page 13, to determine their jurisdiction.
- If your agency is a multi-county office, list each county in which your agency has jurisdiction.

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

Example:

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

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

Part 3. Type of Statement

Check at least one box. The period covered by a statement is determined by the type of statement you are filing. If you are completing a 2023 annual statement, **do not** change the pre-printed dates to reflect 2024. Your annual statement is used for reporting the **previous year's** economic interests. Economic interests for your annual filing covering January 1, 2024, through December 31, 2024, will be disclosed on your statement filed in 2025. See Reference Pamphlet, page 4.

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

Part 4. Schedule Summary

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

Part 5. Verification

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

When you sign your statement, you are stating, under penalty of perjury, that it is true and correct. Only the filer has authority to sign the statement. An unsigned statement is not considered filed and you may be subject to late filing penalties.

SCHEDULE A-1 Investments

Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%)

*Investments must be itemized.
Do not attach brokerage or financial statements.*

<p>▶ NAME OF BUSINESS ENTITY _____</p> <p>GENERAL DESCRIPTION OF THIS BUSINESS _____</p> <hr/> <p>FAIR MARKET VALUE</p> <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000 <p>NATURE OF INVESTMENT</p> <input type="checkbox"/> Stock <input type="checkbox"/> Other _____ (Describe) <input type="checkbox"/> Partnership <input type="checkbox"/> Income Received of \$0 - \$499 <input type="checkbox"/> <input type="checkbox"/> Income Received of \$500 or More (Report on Schedule C) <p>IF APPLICABLE, LIST DATE:</p> <p>____/____/23 ____/____/23 ACQUIRED DISPOSED</p>	<p>▶ NAME OF BUSINESS ENTITY _____</p> <p>GENERAL DESCRIPTION OF THIS BUSINESS _____</p> <hr/> <p>FAIR MARKET VALUE</p> <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000 <p>NATURE OF INVESTMENT</p> <input type="checkbox"/> Stock <input type="checkbox"/> Other _____ (Describe) <input type="checkbox"/> Partnership <input type="checkbox"/> Income Received of \$0 - \$499 <input type="checkbox"/> <input type="checkbox"/> Income Received of \$500 or More (Report on Schedule C) <p>IF APPLICABLE, LIST DATE:</p> <p>____/____/23 ____/____/23 ACQUIRED DISPOSED</p>
<p>▶ NAME OF BUSINESS ENTITY _____</p> <p>GENERAL DESCRIPTION OF THIS BUSINESS _____</p> <hr/> <p>FAIR MARKET VALUE</p> <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000 <p>NATURE OF INVESTMENT</p> <input type="checkbox"/> Stock <input type="checkbox"/> Other _____ (Describe) <input type="checkbox"/> Partnership <input type="checkbox"/> Income Received of \$0 - \$499 <input type="checkbox"/> <input type="checkbox"/> Income Received of \$500 or More (Report on Schedule C) <p>IF APPLICABLE, LIST DATE:</p> <p>____/____/23 ____/____/23 ACQUIRED DISPOSED</p>	<p>▶ NAME OF BUSINESS ENTITY _____</p> <p>GENERAL DESCRIPTION OF THIS BUSINESS _____</p> <hr/> <p>FAIR MARKET VALUE</p> <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000 <p>NATURE OF INVESTMENT</p> <input type="checkbox"/> Stock <input type="checkbox"/> Other _____ (Describe) <input type="checkbox"/> Partnership <input type="checkbox"/> Income Received of \$0 - \$499 <input type="checkbox"/> <input type="checkbox"/> Income Received of \$500 or More (Report on Schedule C) <p>IF APPLICABLE, LIST DATE:</p> <p>____/____/23 ____/____/23 ACQUIRED DISPOSED</p>
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Comments: _____

Instructions – Schedules A-1 and A-2 Investments

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

Reportable investments include:

- Stocks, bonds, warrants, and options, including those held in margin or brokerage accounts and managed investment funds (See Reference Pamphlet, page 13.)
- Sole proprietorships
- Your own business or your spouse’s or registered domestic partner’s business (See Reference Pamphlet, page 8, for the definition of “business entity.”)
- Your spouse’s or registered domestic partner’s investments even if they are legally separate property
- Partnerships (e.g., a law firm or family farm)
- Investments in reportable business entities held in a retirement account (See Reference Pamphlet, page 15.)
- If you, your spouse or registered domestic partner, and dependent children together had a 10% or greater ownership interest in a business entity or trust (including a living trust), you must disclose investments held by the business entity or trust. (See Reference Pamphlet, page 16, for more information on disclosing trusts.)
- Business trusts

You are not required to disclose:

- Government bonds, diversified mutual funds, certain funds similar to diversified mutual funds (such as exchange traded funds) and investments held in certain retirement accounts. (See Reference Pamphlet, page 13.) (Regulation 18237)
- Bank accounts, savings accounts, money market accounts and certificates of deposits
- Cryptocurrency
- Insurance policies
- Annuities
- Commodities
- Shares in a credit union
- Government bonds (including municipal bonds)

Reminders

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

- Retirement accounts invested in non-reportable interests (e.g., insurance policies, mutual funds, or government bonds) (See Reference Pamphlet, page 15.)
- Government defined-benefit pension plans (such as CalPERS and CalSTRS plans)
- Certain interests held in a blind trust (See Reference Pamphlet, page 16.)

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

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

To Complete Schedule A-1:

Do not attach brokerage or financial statements.

- Disclose the name of the business entity. Do not use acronyms for the name of the business entity, unless it is one that is commonly understood by the public.
- Provide a general description of the business activity of the entity (e.g., pharmaceuticals, computers, automobile manufacturing, or communications).
- Check the box indicating the highest fair market value of your investment during the reporting period. If you are filing a candidate or an assuming office statement, indicate the fair market value on the filing date or the date you took office, respectively. (See page 20 for more information.)
- Identify the nature of your investment (e.g., stocks, warrants, options, or bonds).
- An acquired or disposed of date is only required if you initially acquired or entirely disposed of the investment interest during the reporting period. The date of a stock dividend reinvestment or partial disposal is not required. Generally, these dates will not apply if you are filing a candidate or an assuming office statement.

Examples:

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

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

SCHEDULE A-2

Investments, Income, and Assets of Business Entities/Trusts

(Ownership Interest is 10% or Greater)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name _____

▶ 1. BUSINESS ENTITY OR TRUST

Name _____

Address (Business Address Acceptable) _____

Check one
 Trust, go to 2 Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

<p>FAIR MARKET VALUE</p> <input type="checkbox"/> \$0 - \$1,999 <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	<p>IF APPLICABLE, LIST DATE:</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> / <u> </u> / <u> </u> ACQUIRED </td> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> / <u> </u> / <u> </u> DISPOSED </td> </tr> </table>	<input type="checkbox"/> / <u> </u> / <u> </u> ACQUIRED	<input type="checkbox"/> / <u> </u> / <u> </u> DISPOSED
<input type="checkbox"/> / <u> </u> / <u> </u> ACQUIRED	<input type="checkbox"/> / <u> </u> / <u> </u> DISPOSED		

NATURE OF INVESTMENT
 Partnership Sole Proprietorship _____ Other _____

YOUR BUSINESS POSITION _____

▶ 1. BUSINESS ENTITY OR TRUST

Name _____

Address (Business Address Acceptable) _____

Check one
 Trust, go to 2 Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

<p>FAIR MARKET VALUE</p> <input type="checkbox"/> \$0 - \$1,999 <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	<p>IF APPLICABLE, LIST DATE:</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> / <u> </u> / <u> </u> ACQUIRED </td> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> / <u> </u> / <u> </u> DISPOSED </td> </tr> </table>	<input type="checkbox"/> / <u> </u> / <u> </u> ACQUIRED	<input type="checkbox"/> / <u> </u> / <u> </u> DISPOSED
<input type="checkbox"/> / <u> </u> / <u> </u> ACQUIRED	<input type="checkbox"/> / <u> </u> / <u> </u> DISPOSED		

NATURE OF INVESTMENT
 Partnership Sole Proprietorship _____ Other _____

YOUR BUSINESS POSITION _____

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

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

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

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

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

None or Names listed below

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

None or Names listed below

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

Check one box:
 INVESTMENT REAL PROPERTY

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

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

<p>FAIR MARKET VALUE</p> <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	<p>IF APPLICABLE, LIST DATE:</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> / <u> </u> / <u> </u> ACQUIRED </td> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> / <u> </u> / <u> </u> DISPOSED </td> </tr> </table>	<input type="checkbox"/> / <u> </u> / <u> </u> ACQUIRED	<input type="checkbox"/> / <u> </u> / <u> </u> DISPOSED
<input type="checkbox"/> / <u> </u> / <u> </u> ACQUIRED	<input type="checkbox"/> / <u> </u> / <u> </u> DISPOSED		

NATURE OF INTEREST
 Property Ownership/Deed of Trust Stock Partnership
 Leasehold _____ Yrs. remaining Other _____

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

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

Check one box:
 INVESTMENT REAL PROPERTY

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

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

<p>FAIR MARKET VALUE</p> <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	<p>IF APPLICABLE, LIST DATE:</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> / <u> </u> / <u> </u> ACQUIRED </td> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> / <u> </u> / <u> </u> DISPOSED </td> </tr> </table>	<input type="checkbox"/> / <u> </u> / <u> </u> ACQUIRED	<input type="checkbox"/> / <u> </u> / <u> </u> DISPOSED
<input type="checkbox"/> / <u> </u> / <u> </u> ACQUIRED	<input type="checkbox"/> / <u> </u> / <u> </u> DISPOSED		

NATURE OF INTEREST
 Property Ownership/Deed of Trust Stock Partnership
 Leasehold _____ Yrs. remaining Other _____

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

Comments: _____

Instructions – Schedule A-2

Investments, Income, and Assets of Business Entities/Trusts

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

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

To Complete Schedule A-2:

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

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

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

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

- Disclose each source of income and outstanding loan **to the business entity or trust** identified in Part 1 if your pro rata share of the **gross** income (including your community property interest in your spouse's or registered domestic partner's share) to the business entity or trust from that source was \$10,000 or more during the reporting period. (See Reference Pamphlet, page 11, for examples.) Income from governmental sources may be reportable if not considered salary. See Regulation 18232. Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.
- Disclose each individual or entity that was a source of commission income of \$10,000 or more during the reporting period through the business entity identified in Part 1. (See Reference Pamphlet, page 8.)

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

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

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

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

Instructions – Schedule B Interests in Real Property

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

Interests in real property include:

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

You are not required to report:

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

To Complete Schedule B:

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

disclose the number of years remaining on the lease.

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

When reporting a loan:

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

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

Example:

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

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

Reminders

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

SCHEDULE C

Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name _____

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

▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

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

<p>NAME OF LENDER* _____</p> <p>ADDRESS <i>(Business Address Acceptable)</i> _____</p> <p>BUSINESS ACTIVITY, IF ANY, OF LENDER _____</p> <p>HIGHEST BALANCE DURING REPORTING PERIOD</p> <p><input type="checkbox"/> \$500 - \$1,000</p> <p><input type="checkbox"/> \$1,001 - \$10,000</p> <p><input type="checkbox"/> \$10,001 - \$100,000</p> <p><input type="checkbox"/> OVER \$100,000</p>	<p>INTEREST RATE TERM (Months/Years)</p> <p>_____ % <input type="checkbox"/> None _____</p> <p>SECURITY FOR LOAN</p> <p><input type="checkbox"/> None <input type="checkbox"/> Personal residence</p> <p><input type="checkbox"/> Real Property _____ <i>Street address</i></p> <p style="margin-left: 150px;">_____</p> <p style="margin-left: 150px;"><i>City</i></p> <p><input type="checkbox"/> Guarantor _____</p> <p><input type="checkbox"/> Other _____ <i>(Describe)</i></p>
--	---

Comments: _____

Instructions – Schedule C

Income, Loans, & Business Positions

(Income Other Than Gifts and Travel Payments)

Reporting Income:

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

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

Reporting Business Positions:

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

Commonly reportable income and loans include:

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

Reminders

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

You are not required to report:

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

(See Reference Pamphlet, page 12.)

To Complete Schedule C:

Part 1. Income Received/Business Position Disclosure

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

Part 2. Loans Received or Outstanding During the Reporting Period

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

SCHEDULE D
Income – Gifts

Name _____

▶ NAME OF SOURCE *(Not an Acronym)*

 ADDRESS *(Business Address Acceptable)*

 BUSINESS ACTIVITY, IF ANY, OF SOURCE

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

▶ NAME OF SOURCE *(Not an Acronym)*

 ADDRESS *(Business Address Acceptable)*

 BUSINESS ACTIVITY, IF ANY, OF SOURCE

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

▶ NAME OF SOURCE *(Not an Acronym)*

 ADDRESS *(Business Address Acceptable)*

 BUSINESS ACTIVITY, IF ANY, OF SOURCE

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

▶ NAME OF SOURCE *(Not an Acronym)*

 ADDRESS *(Business Address Acceptable)*

 BUSINESS ACTIVITY, IF ANY, OF SOURCE

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

▶ NAME OF SOURCE *(Not an Acronym)*

 ADDRESS *(Business Address Acceptable)*

 BUSINESS ACTIVITY, IF ANY, OF SOURCE

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

▶ NAME OF SOURCE *(Not an Acronym)*

 ADDRESS *(Business Address Acceptable)*

 BUSINESS ACTIVITY, IF ANY, OF SOURCE

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

Comments: _____

Instructions – Schedule D Income – Gifts

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

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

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

Commonly reportable gifts include:

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

Reminders

- Gifts from a single source are subject to a \$590 limit in 2023. (See Reference Pamphlet, page 10.)
- Code filers – you only need to report gifts from reportable sources.

Gift Tracking Mobile Application

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

You are not required to disclose:

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

To Complete Schedule D:

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

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

Name _____

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

▶ NAME OF SOURCE *(Not an Acronym)* _____

ADDRESS *(Business Address Acceptable)* _____

CITY AND STATE _____

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

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

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

Made a Speech/Participated in a Panel

Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE *(Not an Acronym)* _____

ADDRESS *(Business Address Acceptable)* _____

CITY AND STATE _____

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

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

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

Made a Speech/Participated in a Panel

Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE *(Not an Acronym)* _____

ADDRESS *(Business Address Acceptable)* _____

CITY AND STATE _____

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

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

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

Made a Speech/Participated in a Panel

Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE *(Not an Acronym)* _____

ADDRESS *(Business Address Acceptable)* _____

CITY AND STATE _____

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

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

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

Made a Speech/Participated in a Panel

Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

Comments: _____

Instructions – Schedule E Travel Payments, Advances, and Reimbursements

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

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

You are not required to disclose:

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

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

To Complete Schedule E:

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

When reporting travel payments that are gifts, you must provide a description of the gift, the **date(s)** received, and the **travel destination**.

- **Travel payments are income** if you provided services that were equal to or greater in value than the

payments received. You must disclose income totaling \$500 or more from a single source during the period covered by the statement. You have the burden of proving the payments are income rather than gifts. When reporting travel payments as income, you must describe the services you provided in exchange for the payment. You are not required to disclose the date(s) for travel payments that are income.

Example:

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

Note that the same payment from a 501(c)(3) would NOT be reportable.

<small>▶ NAME OF SOURCE (Not an Acronym)</small>	
Health Services Trade Association	
<small>ADDRESS (Business Address Acceptable)</small>	
1230 K Street, Suite 610	
<small>CITY AND STATE</small>	
Sacramento, CA	
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE	
Association of Healthcare Workers	
<small>DATE(S)</small>	<small>AMT. \$</small> 550.00
<small>(if gift)</small>	
<small>▶ MUST CHECK ONE</small> <input type="checkbox"/> Gift <input checked="" type="checkbox"/> Income	
<input type="radio"/> Made a Speech/Participated in a Panel	
<input checked="" type="radio"/> Other - Provide Description <u>Travel reimbursement for board meeting.</u>	
<small>▶ If Gift, Provide Travel Destination</small>	

Example:

Mayor Kim travels to China on a trip organized by China Silicon Valley Business Development, a California nonprofit, 501(c)(6) organization. The Chengdu Municipal People's Government pays for Mayor Kim's airfare and travel costs, as well as meals and lodging during the trip. The trip's agenda shows that the trip's purpose is to promote job creation and economic activity in China and in Silicon Valley, so the trip is reasonably related to a governmental purpose.

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

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

Restrictions and Prohibitions

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

Gift Prohibition

Gifts received by most state and local officials, employees, and candidates are subject to a limit. In 2023-2024, the gift limit increased to \$590 from a single source during a calendar year.

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

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

Disqualification

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

Honorarium Ban

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

Loan Restrictions

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

Post-Governmental Employment

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

Late Filing

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

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

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

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

Form 700 is a Public Document Public Access Must Be Provided

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

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

Questions and Answers

General

Q. What is the reporting period for disclosing interests on an assuming office statement or a candidate statement?

A. On an assuming office statement, disclose all reportable investments, interests in real property, and business positions held on the date you assumed office. In addition, you must disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you assumed office.

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

Q. I hold two other board positions in addition to my position with the county. Must I file three statements of economic interests?

A. Yes, three are required. However, you may instead complete an expanded statement listing the county and the two boards on the Cover Page or an attachment as the agencies for which you will be filing. Disclose all reportable economic interests in all three jurisdictions on the expanded statement. File the expanded statement for your primary position providing an original "wet" signature unless filed with a secure electronic signature. (See page 3 above.) File copies of the expanded statement with the other two agencies as required by Regulation 18723.1(c). Remember to complete separate statements for positions that you leave or assume during the year.

Q. I am a department head who recently began acting as city manager. Should I file as the city manager?

A. Yes. File an assuming office statement as city manager. Persons serving as "acting," "interim," or "alternate" must file as if they hold the position because they are or may be performing the duties of the position.

Q. My spouse and I are currently separated and in the process of obtaining a divorce. Must I still report my spouse's income, investments, and interests in real property?

A. Yes. A public official must continue to report a spouse's economic interests until such time as dissolution of marriage proceedings is final. However, if a separate property agreement has been reached prior to that time, your estranged spouse's income may not have to be reported. Contact the FPPC for more information.

Q. As a designated employee, I left one state agency to work for another state agency. Must I file a leaving office statement?

A. Yes. You may also need to file an assuming office statement for the new agency.

Investment Disclosure

Q. I have an investment interest in shares of stock in a company that does not have an office in my jurisdiction. Must I still disclose my investment interest in this company?

A. Probably. The definition of "doing business in the jurisdiction" is not limited to whether the business has an office or physical location in your jurisdiction. (See Reference Pamphlet, page 13.)

Q. My spouse and I have a living trust. The trust holds rental property in my jurisdiction, our primary residence, and investments in diversified mutual funds. I have full disclosure. How is this trust disclosed?

A. Disclose the name of the trust, the rental property and its income on Schedule A-2. Your primary residence and investments in diversified mutual funds registered with the SEC are not reportable.

Q. I am required to report all investments. I have an IRA that contains stocks through an account managed by a brokerage firm. Must I disclose these stocks even though they are held in an IRA and I did not decide which stocks to purchase?

A. Yes. Disclose on Schedule A-1 or A-2 any stock worth \$2,000 or more in a business entity located in or doing business in your jurisdiction.

Questions and Answers Continued

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

Income Disclosure

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

Questions and Answers Continued

Q. I am sole owner of a private law practice that is not reportable based on my limited disclosure category. However, some of the sources of income to my law practice are from reportable sources. Do I have to disclose this income?

A. Yes, even though the law practice is not reportable, reportable sources of income to the law practice of \$10,000 or more must be disclosed. This information would be disclosed on Schedule C with a note in the "comments" section indicating that the business entity is not a reportable investment. The note would be for informational purposes only; it is not a requirement.

Q. I am the sole owner of my business. Where do I disclose my income - on Schedule A-2 or Schedule C?

A. Sources of income to a business in which you have an ownership interest of 10% or greater are disclosed on Schedule A-2. (See Reference Pamphlet, page 8.)

Q. My spouse is a partner in a four-person firm where all of their business is based on their own billings and collections from various clients. How do I report my community property interest in this business and the income generated in this manner?

A. If your spouse's investment in the firm is 10% or greater, disclose 100% of your spouse's share of the business on Schedule A-2, Part 1 and 50% of your spouse's income on Schedule A-2, Parts 2 and 3. For example, a client of your spouse's must be a source of at least \$20,000 during the reporting period before the client's name is reported.

Q. How do I disclose my spouse's or registered domestic partner's salary?

A. Report the name of the employer as a source of income on Schedule C.

Q. I am a doctor. For purposes of reporting \$10,000 sources of income on Schedule A-2, Part 3, are the patients or their insurance carriers considered sources of income?

A. If your patients exercise sufficient control by selecting you instead of other doctors, then your patients, rather than their insurance carriers, are sources of income to you. (See Reference Pamphlet, page 14.)

Q. I received a loan from my grandfather to purchase my home. Is this loan reportable?

A. No. Loans received from family members are not reportable.

Q. Many years ago, I loaned my parents several thousand dollars, which they paid back this year. Do I need to report this loan repayment on my Form 700?

A. No. Payments received on a loan made to a family member are not reportable.

Real Property Disclosure

Q. During this reporting period we switched our principal place of residence into a rental. I have full disclosure and the property is located in my agency's jurisdiction, so it is now reportable. Because I have not reported this property before, do I need to show an "acquired" date?

A. No, you are not required to show an "acquired" date because you previously owned the property. However, you may want to note in the "comments" section that the property was not previously reported because it was used exclusively as your residence. This would be for informational purposes only; it is not a requirement.

Q. I am a city manager, and I own a rental property located in an adjacent city, but one mile from the city limit. Do I need to report this property interest?

A. Yes. You are required to report this property because it is located within 2 miles of the boundaries of the city you manage.

Q. Must I report a home that I own as a personal residence for my daughter?

A. You are not required to disclose a home used as a personal residence for a family member unless you receive income from it, such as rental income.

Q. I am a co-signer on a loan for a rental property owned by a friend. Since I am listed on the deed of trust, do I need to report my friend's property as an interest in real property on my Form 700?

A. No. Simply being a co-signer on a loan for property does not create a reportable interest in that real property.

Questions and Answers Continued

Gift Disclosure

- Q. If I received a reportable gift of two tickets to a concert valued at \$100 each, but gave the tickets to a friend because I could not attend the concert, do I have any reporting obligations?
- A. Yes. Since you accepted the gift and exercised discretion and control of the use of the tickets, you must disclose the gift on Schedule D.
- Q. Julia and Jared Benson, a married couple, want to give a piece of artwork to a county supervisor. Is each spouse considered a separate source for purposes of the gift limit and disclosure?
- A. Yes, each spouse may make a gift valued at the gift limit during a calendar year. For example, during 2023 the gift limit was \$590, so the Bensons may have given the supervisor artwork valued at no more than \$1,080. The supervisor must identify Jared and Julia Benson as the sources of the gift.
- Q. I am a Form 700 filer with full disclosure. Our agency holds a holiday raffle to raise funds for a local charity. I bought \$10 worth of raffle tickets and won a gift basket valued at \$120. The gift basket was donated by Doug Brewer, a citizen in our city. At the same event, I bought raffle tickets for, and won a quilt valued at \$70. The quilt was donated by a coworker. Are these reportable gifts?
- A. Because the gift basket was donated by an outside source (not an agency employee), you have received a reportable gift valued at \$110 (the value of the basket less the consideration paid). The source of the gift is Doug Brewer and the agency is disclosed as the intermediary. Because the quilt was donated by an employee of your agency, it is not a reportable gift.
- Q. My agency is responsible for disbursing grants. An applicant (501(c)(3) organization) met with agency employees to present its application. At this meeting, the applicant provided food and beverages. Would the food and beverages be considered gifts to the employees? These employees are designated in our agency's conflict of interest code and the applicant is a reportable source of income under the code.
- A. Yes. If the value of the food and beverages consumed by any one filer, plus any other gifts received from the same source during the reporting period total \$50 or more, the food and beverages would be reported using the fair market value and would be subject to the gift limit.
- Q. I received free admission to an educational conference related to my official duties. Part of the conference fees included a round of golf. Is the value of the golf considered informational material?
- A. No. The value of personal benefits, such as golf, attendance at a concert, or sporting event, are gifts subject to reporting and limits.

Monitoring Goals, Actions, and Resources for the 2023-24 Local Control and Accountability Plan (LCAP)

This template is intended for internal monitoring purposes only. The 2023-24 LCAP template and instructions should be consulted when completing required documents.

(6) (A) The superintendent of the school district shall present a report on the annual update to the local control and accountability plan and the local control funding formula budget overview for parents on or before February 28 of each year at a regularly scheduled meeting of the governing board of the school district. (B) The report shall include both of the following: (i) All available midyear outcome data related to metrics identified in the current year's local control and accountability plan. (ii) All available midyear expenditure and implementation data on all actions identified in the current year's local control and accountability plan.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Liberty Elementary School District	Deanna Cardoza, Ed.D. Superintendent	dcardoza@liberty.k12.ca.us 559-686-1675

Goal 1

Goal Description

All students will make progress toward proficiency on the state adopted standards and English learners will make progress learning the English language, using high quality instructional programs.

Expected Annual Measurable Objectives

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24
(P 4) CAASPP 3 - 8 Grade Points above/below Level 3	ELA 4.7 points above Level 3 Math 18.5 points below Level 3 (2018-19)	CAASPP ELA 48% Met/Exceeded Math 34% Met/Exceeded STAR Local Assessment 3rd-8th grade: <ul style="list-style-type: none"> • ELA 51.3% performing at or above grade level • Math 34.3% performing at or 	CAASPP (2021-22) ELA 5.4 points below standard Math 39.3 points below standard iReady Local Assessment 3rd-8th grade: <ul style="list-style-type: none"> • ELA 42.2% performing at or above grade level 	CAASPP (2022-23) ELA 10.4 points below standard Math 47.2 points below standard iReady Local Assessment 3rd-8th grade: 2023-24 Data is not yet available as of mid-year report.	ELA: 5 points above Level 3 Math: 20 points below Level 3 iReady Local Assessment 3rd-8th grade: <ul style="list-style-type: none"> • ELA 50% performing at or above grade level • Math 38% performing at or

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24
(P 2) Implementation of State Standards for all pupils, including unduplicated, ELs and special needs students	District received score of "Met" Implementation of Academic Standards Local Indicator (2018-19)	District received score of "Met" Implementation of Academic Standards Local Indicator (2021-22) above grade level (2021-22)	District received score of "Met." Implementation of Academic Standards Local Indicator (2022-23) • Math 36.2% performing at or above grade level (2022-23)	District received score of "Met." Implementation of Academic Standards Local Indicator (2023-24)	District will receive score of "Met" on CA School Dashboard. Implementation of Academic Standards Local Indicator
(P 8) Reclassification Rate	16.7% (2018-19)	27% (2021-22)	39% (2022-23)	2023-24 Data is not yet available as of mid-year report.	35% Reclassification Annually
(P 4) Percentage of English learner pupils who make progress toward English proficiency as measured by the ELPAC	38.9% EL Students making Progress on ELPAC (2018-19)	No new dashboard data in 2020-21. New dashboard data will be released in December 2022	64.2% EL Students making Progress on ELPAC (2021-22)	67.5% EL Students making Progress on ELPAC (2023-24)	50% EL Students will make progress on ELPAC
(P 1) Degree to which students have standards-aligned instructional materials according to Board adopted Textbook Sufficiency Report	100% of LESD Students to include unduplicated and students with special needs have access to standards aligned instructional materials (2020-21)	100% of LESD Students to include unduplicated and students with special needs have access to standards aligned instructional materials (2021-22)	100% of LESD Students to include unduplicated and students with special needs have access to standards aligned instructional materials. (2022-23)	100% of LESD Students to include unduplicated and students with special needs have access to standards aligned instructional materials. (2023-24)	100% of LESD Students to include unduplicated and students with special needs will have access to standards aligned instructional materials
(P 7) A. All Students have access to a Broad Course of study	District received "Met" on Access to Broad Course of Study Indicator District received "Met" Implementation of Access to Broad Course of Study Indicator	District received "Met" on Access to Broad Course of Study Indicator District received "Met" Implementation of Access to Broad Course of Study Indicator (2021-22)	District received "Met" on Access to Broad Course of Study Indicator District received "Met" Implementation of Access to Broad Course of Study Indicator (2021-22; New results not published to date)	District received "Met" on Access to Broad Course of Study Indicator (2021-22)	District received "Met" of Access to Broad Course of Study Indicator District received "Met" Implementation of Access to Broad Course of Study Indicator (2022-23)

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24
<p>(P 7) B. Programs and services developed and provided to unduplicated students</p>	<p>All Students (including unduplicated students) received instruction in art, music, and physical education, and participated, as evidenced by the number of students enrolled in these classes (art, music, leadership, journalism, ag science, leadership, study skills) and PE, which includes the number of PE minutes received.</p> <p>Grades 6 - 8 Self-selected Elective Classes: Art: 24 students received art Band: 32 students Leadership: 21 students Journalism: 18 students Computer Skills: 18 Ag Science: 32 Study Skills: 16</p> <p>Grades TK-5 All TK-5 Students Receive: Music, Art, PE (2019-20)</p>	<p>All Students (including unduplicated students) are currently receiving instruction in art, music/band, and physical education, and participate, as evidenced by the number of students enrolled in these classes (art, music/band, leadership, journalism, ag science, study skills) and PE, which will include the number of PE minutes received.</p> <p>Grades 6 - 8 Self-selected Elective Classes: Art: 58 students received art Band: 25 students Leadership: 20 students Journalism: 29 students Computer Skills: 29 Ag Science: 29 Study Skills: 29</p> <p>Grades TK-5 All TK-5 Students Receive: Music, Art, PE (2021-22)</p>	<p>All Students (including unduplicated students) are currently receiving instruction in art, music/band, and physical education, and participate, as evidenced by the number of students enrolled in these classes (art, music/band, leadership, journalism, ag science, study skills) and PE, which will include the number of PE minutes received.</p> <p>Grades 6 - 8 Self-selected Elective Classes: Art: 53 students received art Music/Band: 27 students Leadership: 24 students Journalism: 21 students College & Career: 27 Ag Science: 28 Drama: 25</p> <p>Grades TK-5 All TK-5 Students Receive: Music, Art, PE (2022-23)</p>	<p>2023-24 Data is not yet available as of mid-year report.</p>	<p>All Students (including unduplicated students) will receive instruction in art, music, and physical education, and participated, as evidenced by the number of students enrolled in these classes (art, music/band, leadership, journalism, ag science, leadership, study skills) and PE, which includes the number of PE minutes received.</p>
<p>(P 7) C. Programs and services developed and provided to individuals with exceptional needs</p>	<p>All Students (including students with exceptional needs) received instruction in art, music, and physical education, and participated, as evidenced by the number of students enrolled in these classes (art, music, leadership, journalism, ag science, study skills, and computer</p>	<p>All Students (including students with exceptional needs) are currently receiving instruction in art, music/band, and physical education, and participate, as evidenced by the number of students enrolled in these classes (art, music/band, leadership, journalism, ag</p>	<p>All Students (including students with exceptional needs) are currently receiving instruction in art, music/band, and physical education, and participate, as evidenced by the number of students enrolled in these classes (art, music/band, leadership, journalism, ag</p>	<p>2023-24 Data is not yet available as of mid-year report.</p>	<p>All Students (including students with exceptional needs) will receive instruction in art, music, and physical education, and participated, as evidenced by the number of students enrolled in these classes (art, music/band, leadership, journalism, ag science,</p>

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24
(P 4) CAST 5th and 8th grade	33.7% Met or Exceeded Standard (2018-19)	CAST not administered in 2020-21 New CAST data will be released June 2022	41.37% Met or Exceeded Standard on CAST assessment. (2021-22)	30.92% Met or Exceeded Standard on CAST assessment. (2022-23)	43% will have Met/Exceeded Standard
(P 4) ELPAC Summative Assessment	16.67% EL Students scored proficient/level 4 (well developed) on ELPAC assessment (2018-19)	27.59% EL Students scored proficient/level 4 (well developed) on ELPAC assessment (2020-21)	33.93% EL Students scored proficient/level 4 well developed on ELPAC assessment. (2021-22)	28.57% EL Students scored proficient/level 4 well developed on ELPAC assessment. (2022-23)	35% EL Students will score proficient/level 4 (well developed) on ELPAC assessment

Actions & Measuring and Reporting Results

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
1.1	Standards-Aligned Instructional Materials	Yes	Fully Implemented	Instructional materials to support the core were		\$11,000.00	\$3,853.00

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures	
1.2	<p>Provide students to include low income and English learner students with up-to-date instructional materials (print and digital) that provide specialized lessons, materials, and technology components that include increased support for English learners and students performing below grade level. Subject matter may include history and social studies, science, social-emotional curriculum, college and career readiness, art, STEM and physical education.</p> <p>Instructional Programs and Assessments Utilize data (including formative assessments, summative assessments, and student work) to identify what evidence based instructional practices would meet the needs of special populations. Engage in an annual curriculum audit to determine current practice and delivery of curriculum and support. In the audit, include a review of the school's cultural relevance and sensitivity. Based on the curriculum audit findings, prioritize the sequence of new content adoptions for content areas by grade level and need. Supplemental programs include: Lexia/Reading PLUS TK-8, IXL TK-8 (Math; ELA), Renaissance STAR Reading/Math Assessment in K-8, i-Ready, computer adapted Typing Club Program in grades TK-6, and supplemental elective class</p>	Yes	Fully Implemented	<p>provided in the subjects/areas of: ELA Math Science History/Social-Studies</p> <p>Additional materials to support reading and writing are anticipated to be purchased in 2023-24.</p>	<p>LCAP funds were used to purchase/subscribe to the following data and instructional programs to support student learning: i-Ready curriculum and assessments for math and ELA TK-8 Lexia/ Reading PLUS TK-8 IXL for math and ELA TK-8 STAR Assessments for reading and math K-8 Typing Club Additional funding utilized to support: (ELD, Writing, Music/Band)</p>		\$36,389.00	\$3,965.00

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
1.3	Instructional Support Staff Liberty ESd will hire, train, and maintain quality classified staff (Intervention Instructional Aides) to assist the school and teachers in instruction, supervision, and educating all students to include EL and students with special needs, and unduplicated students. Instructional assistants in the resource room ensure students are learning in a safe and supportive environment.	Yes	Fully Implemented	Funding to hire, train, and maintain highly qualified staff was used for one (1) specialized Instructional Aide to provide intervention, supervision, and resource room support(s).		\$17,832.00	\$19,356.69
1.4	Technology Services Provide technology devices, computer technician, standards aligned digital content/subscriptions, Chromebook licensing, GoGuardian teacher and classroom management software to manage devices, block inappropriate content, and minimize risk to keep students safer online. Students in grades 1-8 have Chromebooks and standards aligned digital content. Students in grades TK-1 have access to iPads and standards aligned digital content.	Yes	Fully Implemented	Technology funding was used for GoGuardian safety licensing, Chromebooks, Catapult K-12 website services, Chromebook repairs/replacements, and digital licenses on devices. Funding also supported one (1) FTE computer technician to manage and maintain technology on campus.		\$61,872.00	\$34,151.70

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
1.5	Staff Professional Development Staff are supported with leadership, training, and professional learning opportunities relative to Designated and Integrated ELD, and Designated Language Acquisition Programs. Techniques for inclusion, UDL, and math tasks and performance practices. Tulare COE consultants will be consulted to provide a portion of this training.	Yes	Fully Implemented	Training in the areas of Assisting English Learners with technology in the classroom, WMP/WMV/ Math Proficiency strategies were completed so far this school year. Additional staff trainings are scheduled in the coming months of 2023-2024.		\$3,500.00	\$0.00
				TCOE was contracted for professional development in the area of: Library/ Media Services, Migrant Education, New Teacher Leadership & Development, CHOICES Prevention/Intervention Education, School Health Programs, and Library Media Services.			

Goal 2

Goal Description

Students will learn in a safe, positive learning environment, where they are supported, engaged, and feel connected to their school.

Expected Annual Measurable Objectives

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24
(P 5)	2.6% Chronically Absent	7.5% Chronically Absent	11.8% Chronically Absent	9.1% Chronically Absent	8% Chronically Absent

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24
Chronic Absenteeism	Increased 2.6% (2019 CA School Dashboard)	(2020-21)	(2021-22)	(2022-23)	
(P 6) Student Suspension Rates Student Expulsion Rates	0.4% student suspensions; increased 0.0% student expulsions (2019 CA School Dashboard)	0.0% student suspensions 0.0% student expulsions (2020-21)	0.5% student suspensions 0.0% student expulsions (2021-22)	0.4% student suspensions 0.001% student expulsions (2022-23)	0.0% student suspensions 0.0% student expulsion
(P 5) School Attendance according to Aeries Attendance	94% Attendance Rate (2020-21)	94.7% Attendance Rate per P2 (2021-22)	96.2% Attendance Rate per P2 (2022-23)	2023-24 Attendance Rate data is not available at the time of this mid-year report.	96% Attendance Rate
(P 3) Parent Involvement School promotes parental participation in programs for unduplicated students	District "Met" indicator for Parent Engagement. (2021 CA School Dashboard)	District "Met" indicator for Parent Engagement. (2022 CA School Dashboard)	District "Met" indicator for Parent Engagement. (2023 CA School Dashboard)	District "Met" indicator for Parent Engagement. (2023 CA School Dashboard)	District will have "Met" the indicator for Parent Engagement. (CA School Dashboard)
The school promotes parent participation in programs for individuals with exceptional needs	2021 Parent/Teacher Conference Attendance Rate: Parents (including parents of unduplicated pupils and pupils with exceptional needs) received meaningful and timely messages communicating their students' progress and/or achievement measured by the percentage of parents attending parent/teacher conferences.	Parent/Teacher Conference Attendance Rate: Parents (including parents of unduplicated pupils and pupils with exceptional needs) received meaningful and timely messages communicating their students' progress and/or achievement measured by the percentage of parents attending parent/teacher conferences.	Parent/Teacher Conference Attendance Rate: Parents (including parents of unduplicated pupils and pupils with exceptional needs) received meaningful and timely messages communicating their students' progress and/or achievement measured by the percentage of parents attending parent/teacher conferences.	2023-24 parent attendance rates for IEP meetings and teacher conference are not available at the time of this mid-year report.	Parent/Teacher Conference Attendance Rate Parents (including parents of unduplicated pupils and pupils with exceptional needs) received meaningful and timely messages communicating their students' progress and/or achievement measured by the percentage of parents attending parent/teacher conferences.
	100% Parent Attendance at IEP Meetings. 94% Parent attendance rate at virtual conferences (2020-21)	94% Parent Attendance at IEP Meetings 79% Parent attendance rate at virtual conferences	100% Parent Attendance at IEP Meetings		100% Parent Attendance at IEP Meetings

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24
(P 6) Other local measures; School Climate Sense of Safety and School Connectedness surveys of pupils, parents, and teachers	89% of Parents agree/strongly with the statement, "My child is safe at school" 97.8% of Teachers agree/strongly with the statement, "I feel safe while at work" 91.2% of Students agree/strongly with the statement, "I feel safe at school" (2020-21 Survey) Parents, teachers, and students sense of school connectedness	93.4% of Parents agree/strongly with the statement, "My child is safe at school" 95.6% of Teachers agree/strongly with the statement, "I feel safe while at work" 86.2% of Students agree/strongly with the statement, "I feel safe at school" (2021-22 Survey)	82% of Parents agree/strongly with the statement, "My child is safe at school" 100% of Teachers agree/strongly with the statement, "I feel safe while at work" 78.5% of Students agree/strongly with the statement, "I feel safe at school" 94% of Parents agree/strongly with the statement, "My child feels connected at school" 91% of Teachers agree/strongly with the statement, "I feel connected at work"	2023-24 Survey data is not available at the time of this mid-year report.	99% of Parents will agree/strongly with the statement, "My child is safe at school" 100% of Teachers will agree/strongly with the statement, "I feel safe while at work" 95% of Students will agree/strongly with the statement, "I feel safe at school" 90% of Parents will agree/strongly with the statement, "My child feels connected at school" 95% of Teachers will agree/strongly with the statement, "I feel connected at work" 90% of Students will agree/strongly with the statement, "I feel connected at school"
(P 5) Middle school dropout rates	0.0% Middle school dropout rates (2021 Aeries Attendance)	0.0% Middle school dropout rates (2021-22)	0.0% Middle school dropout rates (2022-23)	0.0% Middle school dropout rates (2023)	0.0% Middle school dropout rate

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24
(P 1) School Facilities are maintained	"Exemplary" score (2020-21) Facilities Inspection Tool (FIT))	"Exemplary" score (2021-22)	"Exemplary" score (2022-23)	2023-24 data is not available at the time of this mid-year report.	"Exemplary" score will be received
(P 3) The effort the school makes to seek parent input for the school district and school.	School Maintained Regularly Scheduled Parent Advisory Meetings. School Site Council meetings, District English Learner Advisory Committee meetings, Parent/Teacher Club Advisory Committee meetings, and response to parent surveys. 98% active member attendance LPTC meetings: 100% of scheduled meetings held SSC/ELAC Advisory Committees held quarterly meetings Parent Advisory Committee met monthly during the school year SSC meetings: 100% of scheduled meetings held Parent Survey: 95% Agree/Strongly Agree: I receive adequate information regarding parent meeting/activities to include School Site Council, English Learner Advisory Committee, parent workshops, back to school night, and I receive adequate information regarding parent meeting/activities and parent workshops. (2020-21)	School Maintained Regularly Scheduled Parent Advisory Meetings. School Site Council meetings, District English Learner Advisory Committee meetings, Parent/Teacher Club Advisory Committee meetings, and response to parent surveys. 96% active member attendance LPTC meetings: 100% of scheduled meetings held (2021-22)	School Maintained Regularly Scheduled Parent Advisory Meetings. School Site Council meetings, District English Learner Advisory Committee meetings, Parent/Teacher Club Advisory Committee meetings, and response to parent surveys. 99% active member attendance LPTC meetings: 100% of scheduled meetings held (2022-23)	2023-24 data is not available at the time of this mid-year report.	School Maintained Regularly Scheduled Parent Advisory Meetings. School Site Council meetings, District English Learner Advisory Committee meetings, Parent/Teacher Club Advisory Committee meetings, and response to parent surveys. 100% active member attendance LPTC meetings monthly. SSC/ELAC Advisory Committees held quarterly scheduled meetings. LES D Parent Survey: 98% Agree/Strongly Agree: I receive adequate information regarding parent meeting/activities to include School Site Council, English Learner Advisory Committee, parent workshops, back to school night, and I receive adequate information regarding parent meeting/activities and parent workshops.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24
		(2021-22)	(2022-23)		

Actions & Measuring and Reporting Results

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
2.1	<p>Coordination of Student Support Provide designated staff to connect families with community resources to support student health, wellness, attendance and education.</p> <p>Ensure that there is a continuum of social-emotional, behavioral and mental health supports/resources, and the process for accessing it is clear so that all schools and families, including those with students experiencing homelessness and foster youth, know how to access them.</p> <p>Principal to conduct home visits, phone calls, and support to students, parents, and families. Social Worker to support and assist with improving parent and family involvement. School Psychologist 10 days per month to conduct student special education assessments. School Climate, Child Welfare, and Attendance Clerk to provide to the school in the development of programs that improve school attendance and reduce chronic absenteeism.</p>	Yes	Fully Implemented	<p>LCAP funds were utilized to provide all or part of the following staff salaries/benefits: .75 FTE Social worker supported with LCAP funds as well as 1.0 FTE school psychologist 1.0 FTE Climate/Welfare/Attendance clerk in order to support reduce chronic absenteeism as well as promoting student health, wellness, and education. Social-Emotional, behavioral, and mental health resources and connections to community supports were provided to families. Home visits, phone calls by principal for families supports are ongoing.</p>		\$265,359.00	\$78,798.15

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
2.2	<p>Intervention Resource Classroom COE Special Education, Behavioral Health Services Classroom on Campus to support the academic, behavioral, and mental health of high needs students. This action is principally directed to students of low income families that may not have access to supports outside of school, however all students will have access to academic, social-emotional, and behavioral support at school.</p>	Yes	Fully Implemented	One Behavioral health services classroom on campus was supported through a contract with TCOE to support academic, behavioral, and mental health of high needs students.		\$180,000.00	\$0.00
2.3	<p>Health Professionals (Physical/Social-Emotional) School health professionals (Full-time School Nurse and Contracted COE nurse) provide direct services to students to promote health and well-being and intervene when actual and potential health problems occur. The school nurse communicates with parents and connects families with community resources. This action is principally directed to students of low income families that may not have access to supports outside of school, however, all students will have access to professional health services and support (physical/social-emotional) at school.</p>	Yes	Fully Implemented	LCAP funds provide 1.0 FTE school LVN and .5 FTE school nurse and 13 contracted days with a TCOE registered school nurse to support student health and attendance and support school health staff.		\$133,683.00	\$62,726.10

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
2.4	Attendance/Behavior Rewards The district will improve student attendance and encourage positive behavior by offering rewards and incentives to those students with good monthly attendance and behavior. This action is to encourage low income and English learner student come to school every day.	Yes	Fully Implemented	Positive attendance incentives such as pizza, ice cream, snow cones have been provided this year with additional incentives planned for the remaining months of the 2023-24 school year.		\$4,000.00	\$0.00
2.5	Parent Engagement The district will provide parents with information and educational resources to support students' success in school. The social worker will provide outreach to families to connect them to resources in the community, as a strategy to help support parents as academic partners. The district will increase parent engagement and involvement by offering student rewards and incentives for PBIS, Character Counts, English learner achievement recognition assemblies. The district will increase family engagement using the Remind and Parent Square communication applications linked to Aeries, the district's Student Information System. Outreach will target low-income and English learner families.	Yes	Fully Implemented	PBIS, Character Counts incentives/awards have been purchased, with additional awards assemblies scheduled throughout the 2023-24 school year. The English learner achievement awards/recognition. Contracts for Remind and Parent Square are paid through 2023-24 to increase communication from school to home and family engagement.		\$5,000.00	\$0.00

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
2.6	Additional Safety Measures The district will invest in additional safety measures and devices to ensure all students, staff, and families are and feel safe on campus.	Yes	Fully Implemented	Funds have been spent this year on safety items such as: An electronic office door and camera with additional plans for: Upgrade privacy fencing to ensure students, staff, and families feel safe on campus. Student crisis response reunification program.		\$5,000.00	\$1,788.00

Goal 3

Goal Description

The district will hire, support, and retain qualified teachers, which are appropriately assigned and fully credentialed.

Expected Annual Measurable Objectives

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24
(P 4) New Teacher Induction Program	100% of New Teachers completed the Induction Program (2020-21)	100% of New Teachers working toward completing the Induction Program (2021-22)	100% of New Teachers working toward completing the Induction Program (2022-23)	100% of New Teachers working toward completing the Induction Program (2023-24)	100% of New Teachers will complete the Induction Program
(P 1) Teachers are appropriately assigned and credentialed in the subject areas with authorization from CCTC, the Board, or COE	100% of teachers are appropriately assigned in the subject areas with authorization from CCTC, the Board, or COE. 86% of teachers are fully credentialed (2020-21)	100% of teachers are appropriately assigned in the subject areas with authorization from CCTC, the Board, or COE. 81% of teachers are fully credentialed (2021-22)	100% of teachers are appropriately assigned in the subject areas with authorization from CCTC, the Board, or COE. 91% of teachers are fully credentialed (2022-23)	100% of teachers are appropriately assigned in the subject areas with authorization from CCTC, the Board, or COE. 86% of teachers are fully credentialed (2023-24)	100% of teachers are appropriately assigned in the subject areas with authorization from CCTC, the Board, or COE. 90% of teachers are fully credentialed

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24
(P 4) Teacher Access to Professional Development	100% of Teachers Received Professional Development (2020-21)	100% of Teachers Received Professional Development (2021-22)	100% of Teachers Received Professional Development (2022-23)	100% of teacher received professional development so far in 2023-24.	100% of Teachers will receive Professional Development

Actions & Measuring and Reporting Results

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
3.1	Teacher Professional Development Teachers are supported with leadership, training, and professional development focusing on standards-based materials and instruction. Training will be focused on learning acceleration, designated and integrated ELD, Next Generation Science Standards (NGSS), foundational reading strategies, interactive writing, critical reading (specifically in the area of informational text), techniques for inclusion, UDL, and math tasks and performance practices. Tulare COE consultants will be consulted to provide this training as well as Aeries consultants.	Yes	Fully Implemented	Professional Development has been provided in the areas of: New Teacher Development Curriculum and Instruction Curriculum alignment during the first half of the 2023-24 school year with additional PD planned on the topics of: Student Data Review and Progress Monitoring i-Ready Data in the second part of the year. TCOE has been contracted to provide part of this training. Aeries will not be retained this year for student information services trainings.		\$5,000.00	\$0.00
3.2	New Teacher Support and Assessment The district will contract with the COE (CTC) accredited new teacher induction program. New teachers will receive induction support for	Yes	Fully Implemented	Teacher induction has been provided with LCAP funding for three (3) qualified teachers. 2023-24.		\$6,000.00	\$0.00

Goal # Action #	Action Title and Description	Contributing	Implementation Level	Mid-year Outcome Data	Other Data/Evidence (qualitative, quantitative, artifacts)	Total Funds Budgeted	Mid-Year Expenditures
	two years and will clear their credentials through the Induction program. Costs include program fees and supplies.						
3.3	<p>Teacher Collaboration Opportunities Provide weekly collaboration time for teachers. Administrators and teachers conduct detailed, sophisticated analysis of English learners and low income students' performance on formative and summative assessments, and use information gained from the analysis to plan instruction and intervention. Support staff will provide teacher coverage to allow teachers more release time for instructional rounds.</p>	Yes	Fully Implemented	Weekly collaboration time has been provided for teachers to analyze English Learner performance, plan differentiation, evaluate instructional program, and determine ongoing adjustments to meet student needs. Support staff provide coverage as needed to allow teachers time to complete instructional rounds in order to strengthen their teaching practices.		\$0.00	\$0.00

Liberty Elementary School District

Board Meeting of the Board of Trustees

Minutes

Liberty Elementary School

Library

1771 East Pacific Avenue. Tulare, CA 93274

Tuesday, January 09, 2024

6:00pm 1.0 **Call to Order** 6:02 p.m.

2.0 **Adopt Agenda (Action Item)**

This item is provided as an opportunity for trustees, through consensus, to approve, re-sequence, or table agenda topics. In accordance with the Brown Act Requirements effective July 1, 2008, if documents are distributed to board members concerning an agenda item within 72 hours of a regular board meeting, at the same time the documents will be made available for public inspection at the District Office located at 1771 E. Pacific Ave. Tulare, CA 93274.

In compliance with the Americans with Disabilities Act and the Brown Act, if you need special assistance to participate in this meeting, including receipt of the agenda and documents in the agenda package in an alternate format, please contact the Liberty Elementary School District Office at (559) 686-1675. Notification 48 hours prior to the meeting will enable the district to make reasonable arrangements to ensure accessibility to this meeting (28CFR35.102-35, 104 ADA Title II), and allow for the preparation of documents in the appropriate alternate format.

3.0 **Adjourn to Closed Session** 6:02 p.m.

The Board may adjourn to closed session to discuss matters of personnel security, negotiations, student discipline, litigation, or other matters as authorized by the government Code Section 3459.1, 5496.6 and 54967.6 and Ed Code Sections 35136 and 48913.

- a. **(Ed Code Section 35146, 48900) Student Discipline & Other Confidential Student Matters.**
- b. **(Gov. Code 54957) Public Employee Discipline/Dismissal/Release**
- c. **Employment, resignations, transfers, etc. of Certificated and Classified Personnel**

6:30pm 4.0 **Reconvene in Open Session** 6:30 p.m. –*No Action Taken*

4.1 **Flag Salute**

4.2	Roll Call:	Ron Koetsier	President	<i>Present</i>
		John Beaver	Clerk	<i>Present</i>
		Diane Tanner	Member	<i>Present</i>
		Jonathon Thorpe	Member	<i>Present</i>
		Jill White	Member	<i>Present</i>

Also in attendance for Closed and Open Session: Deanna Cardoza (Superintendent).

BOARD GOALS

1. **Achieve high academic standards and meet the needs of all students in a safe and supportive environment.**
2. **Provide quality educational, extra-curricular, and athletic opportunities through exemplary activity programs.**
3. **Improve district organization, growth and capacity of facilities.**

- 4.3 **Board President** – Opportunity for Board President to comment or report on any matters pertinent or of concern to the Board.
 - a. **Board President to announce Closed Session Items of Discussion.**

- 4.4 **Public Comments:**

Those in the audience desiring to address the Board regarding items not on the agenda may do so at this time. Each speaker is to have (3) three minutes to address the Board and make a brief statement, express his/her viewpoint, or ask a question regarding matters related to the school system. Please understand that the Board does not take action on non-agenda items.

- 5.0 **Information Items:**

This item is provided for informational reports and will highlight district and student events and successes.

- 5.1 **Staff Reports** - Opportunity for Liberty Elementary School Staff Members to comment or report on any matters pertinent or of concern to the Board.

- 5.2 **Superintendent** – Opportunity for Superintendent to comment or report on any matters pertinent or of concern to the Board. *Track update-May be a slight delay due to the asphalt curing process.*

- 5.3 **Principal-** Opportunity for Principal to comment or report on any matters pertinent or of concern to the Board. *Our students will be celebrating the 100th day of school on January 29th.*

- 5.4 **First Reading on Updated CSBA December 2023 Board Policies**

- 6.0 **Action Items:**

These items are provided for Board information, discussion, and/or action.

- 6.1 **Approval of Consent Agenda**

***Minutes of Regular Board Meeting, December 12, 2023**
***Payment of Warrants**
Diane Tanner made a motion to approve the Consent Agenda 2nd made by Jill White
Ayes: John Beaver, Ron Koetsier, Diane Tanner, Jill White and Jonathon Thorpe
Noes: 0 Abstain: 0 Absent: 0 *Motion Carried*

- 6.2 Approval of Tulare County Office of Education ActVnet innovative school safety program**
Diane Tanner made a motion to approve the ActVnet Program 2nd made by Jill White
Ayes: Diane Tanner, Jill White Noes: Jonathon Thorpe, Ron Koetsier and John Beaver
Abstain: 0 Absent: 0 Motion failed
- 6.3 Approval of Annual Developer Fee Report 2022-2023**
John Beaver made a motion to approve the 2022-2023 Annual Developer Fee Report 2nd
made by Jonathon Thorpe Ayes: John Beaver, Ron Koetsier, Diane Tanner, Jill White
and Jonathon Thorpe Noes: 0 Abstain: 0 Absent: 0 Motion Carried

Adjournment: 7:16 p.m.

Accounts Payable Final Prelist - 1/11/2024 9:32:40AM

*** FINAL ***

Batch No 324

Audit:

Amount Flag EFT

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
000585	AT&T	PV-240321	1/8/2024		BAN 9391032124		010-00000-0-00000-82000-59000-0	\$133.88		
	AT&T	PV-240322	1/8/2024		BAN 9391057381		010-00000-0-00000-82000-59000-0	\$348.93		
	AT&T	PV-240323	1/8/2024		BAN9391028846		010-00000-0-00000-82000-59000-0	\$264.12		
								\$746.93		
000724	AT&T MOBILITY	PV-240344	1/1/2024		ACCT#829065989		010-00000-0-00000-82000-59000-0	\$78.03		
								\$78.03		
000687	BSK Associates	PV-240346	1/9/2024		AH000501/AH00755		010-00000-0-00000-82000-56000-0	\$205.00		
								\$205.00		
000971	CALIFORNIA BUSINESS MACHINES	PV-240324	1/8/2024		339824		010-00000-0-00000-82000-56000-0	\$552.91		
								\$552.91		
000515	CALIFORNIA DEPT OF EDUCATION	PV-240329	7/1/2023		2022-2023 INTEREST		010-00000-0-00000-91000-74380-0	\$759.64		
	CALIFORNIA DEPT OF EDUCATION		7/1/2023		2022-2023 INTEREST		010-00000-0-00000-91000-74380-0	\$261.96		
	CALIFORNIA DEPT OF EDUCATION		7/1/2023		2022-2023 INTEREST		010-00000-0-00000-91000-74380-0	\$590.79		
								\$270.50		
								\$1,892.89		
000589	California Turf Equipment	PV-240325	12/15/2023		617007		010-00000-0-00000-82000-43000-0	\$715.02		
								\$715.02		
000422	Central Tulare County Schools	PV-240351	1/2/2024		07 - LIAB/JPA		010-00000-0-00000-71000-58000-0	\$16,507.00		
								\$16,507.00		
000617	City of Tulare	PV-240339	1/9/2024		CUST # 251965+001		010-00000-0-00000-82000-55000-0	\$1,113.20		
								\$1,113.20		
000797	CVIN / VAST	PV-240347	1/1/2024		50930		010-00000-0-00000-82000-59000-0	\$292.50		
								\$292.50		
000857	De Lage Laden Financial Serv	PV-240338	1/6/2024		ACCT#379893		010-00000-0-00000-82000-56000-0	(\$96.09)		
								\$292.50		
								\$292.50		

Monthly Paying

Monthly Paying

Monthly Paying

Monthly Paying

Quarterly Interest

M.O.T

Annual Paying

Monthly Paying

Monthly Paying

Monthly Paying

Accounts Payable Final Prelist - 1/11/2024 9:32:40AM

*** FINAL ***

Batch No 324

Audit

Amount Flag EFT

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Total Check Amount:	Amount	Flag	EFT
000629	Pitney Bowes	PV-240332	1/2/2024		8000900002284283POST		010-00000-0-00000-82000-56000-0	\$6,460.00	\$200.00		
	Pitney Bowes	PV-240349	1/8/2024		ACCT#10584877-INK		010-00000-0-00000-82000-59000-0	\$98.82	\$98.82		
000064	SISC	PV-240333	1/1/2024		CLIENT ID 71985	*	010-00000-0-00000-95024-0	\$81,145.40	\$81,145.40		
000050	Southern California Edison	PV-240327	1/8/2024		ACCT#700055215373	*	010-00000-0-00000-82000-55000-0	\$9,508.92	\$9,508.92		
000050	Southern California Edison	PV-240328	1/8/2024		ACCT#700431744721	*	010-00000-0-00000-82000-55000-0	\$739.37	\$739.37		
000990	SOUTHERN TIRE MART, LLC	PV-240343	1/1/2024		7200007622		010-07230-0-00000-36000-43000-0	\$3,156.43	\$3,156.43		
000709	Southwest School Supply	PV-240320	11/3/2023		PL SEE ATTACHED		010-00000-0-11100-10000-43000-0	\$4,937.85	\$4,937.85		
000691	SWRCB FEES	PV-240342	1/1/2024		SM-1043686		010-00000-0-00000-82000-55000-0	\$2,732.12	\$2,732.12		
000997	TOP SCORE WRITING	PV-240334	1/8/2024		20204		010-11000-0-11100-10000-43000-0	\$641.52	\$641.52		
000288	Tulare County Office of Educ Tulare County Office of Educ	PV-240336	1/1/2024		241237/241382		010-07200-0-00000-71000-58000-0	\$9,000.00	\$9,000.00		
					241237/241382		010-00000-0-00000-31400-58000-0	\$175.00	\$175.00		
000696	UNWIRED BROADBAND, INC	PV-240341	1/1/2024		01858795		010-00000-0-00000-82000-59000-0	\$349.99	\$349.99		
000493	Valley Expetec	PV-240335	1/1/2024		A0003407/406/B000114		010-07200-0-00000-72000-58000-0	\$5,156.00	\$5,156.00		

Postage Expense

Monthly Billing

Monthly Billing

Monthly Billing

Buses

Inst. Supplies

Annual Permit

Inst. Program

TCOE Teacher's Support

Monthly Billing

Monthly Billing

Accounts Payable Final Prelist - 1/11/2024 9:32:40AM

*** FINAL ***

Batch No 324

Audit

Amount Flag EFT

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
000493	Valley Expetec	PV-240335	1/1/2024		A0003407/406/B000114		010-00000-0-00000-72000-58000-0	\$6,313.89		
	Valley Expetec		1/1/2024		A0003407/406/B000114		010-00000-0-11100-10000-43000-0	\$1,071.68		
Total Check Amount:								\$12,541.57		

Monthly
Posting

23 Liberty Elementary School District
 Tulare County Office of Education
 Accounts Payable Final Prelist - 1/25/2024 10:24:45AM
 1/25/2024 10:24:45AM
 Page 1 of 3
 APV500

*** FINAL ***

Batch No 325

Audit
 Amount Flag EFT

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
000724	AT&T MOBILITY	PV-240353	1/24/2024		ACCT#829065989		010-00000-0-00000-82000-59000-0	\$78.33		
								\$78.33		
										<i>Monthly Billing</i>
000515	CALIFORNIA DEPT OF EDUCATION CALIFORNIA DEPT OF EDUCATION	PV-240355 PV-240356	1/24/2024 1/24/2024		OCT-DEC-23-INTEREST JULY-SEPT-23-INTERES		010-00000-0-00000-91000-74380-0 010-00000-0-00000-91000-74380-0	\$2,075.36 \$1,677.52		
								\$3,752.88		
										<i>Quarterly Interest</i>
000225	CARTOZJANS AIR CONDITIONING	PV-240354	1/1/2024		BP/010124		010-81500-0-00000-81100-56000-0	\$4,720.00		
								\$4,720.00		
										<i>Monthly Billing</i>
000782	Deolinda Barcellos	PV-240357	1/24/2024		MUSIC SOFTWARE		010-00000-0-11100-10000-43000-0	\$99.00		
								\$99.00		
										<i>Music Instruction</i>
000910	EKC Enterprises Inc	PV-240359	1/15/2024		50917		010-07200-0-00000-71000-58000-0	\$525.00		
								\$525.00		
										<i>Maintenance Security</i>
000093	EMPLOYMENT DEVELOPMENT DEPARTM EMPLOYMENT DEVELOPMENT DEPARTM	PV-240358	1/24/2024		ACCT#94238201		010-00000-0-00000-00000-95025-0	\$85.95		
								\$611.66		
										<i>Quarterly Billing</i>
000768	EWING IRRIGATION PRODUCTS, INC	PV-240360	1/12/2024		21378314		010-81500-0-00000-81100-43000-0	\$2,025.69		
								\$2,025.69		
										<i>Maintenance</i>
000783	JW PEPPER	PV-240361	1/12/2024		ACCT#627726		010-00000-0-11100-10000-43000-0	\$331.93		
								\$331.93		
										<i>Instructional Supplies</i>
000795	Kaylin Reeves	PV-240362	1/12/2024		SUPPLIES		010-11000-0-11100-10000-43000-0	\$118.59		
								\$118.59		
										<i>Instructional Supplies</i>
000973	LEAF	PV-240363	1/21/2024		15955270		010-00000-0-00000-82000-56000-0	\$1,368.51		
								\$1,368.51		
										<i>Monthly Billing</i>
								\$1,368.51		
										<i>Monthly Billing</i>

Total Check Amount:

\$1,368.51

Monthly Billing

Total Check Amount:

\$118.59

Instructional Supplies

Total Check Amount:

\$331.93

Instructional Supplies

Total Check Amount:

\$2,025.69

Maintenance

Total Check Amount:

\$697.61

Quarterly Billing

Total Check Amount:

\$525.00

Maintenance Security

Total Check Amount:

\$99.00

Music Instruction

Total Check Amount:

\$4,720.00

Monthly Billing

Total Check Amount:

\$3,752.88

Quarterly Interest

Total Check Amount:

\$78.33

Monthly Billing

Total Check Amount:

\$2,075.36

Quarterly Interest

Total Check Amount:

\$1,677.52

Quarterly Interest

23 Liberty Elementary School District
Tulare County Office of Education
Accounts Payable Final Prelist - 1/25/2024 10:13:55AM

1/25/2024
 10:13:55AM
 Page 2 of 3
 APY500

*** FINAL ***
 Batch No 325
 Audit
 Amount Flag EFT

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
000994	LIBERTY ELE. ED. FOUNDATIONI	PV-240364	1/21/2024		DEC/NOV-BAL		010-26000-0-11100-10000-58000-0	\$8,594.69		
										<i>After School Payment</i>
000938	LIMINEX INC - GO GUARDIAN	PV-240365	8/16/2023		106943		010-41260-3-11100-10000-58000-0	\$8,594.69		
										<i>Annual Billing</i>
000158	Lozano Smith,LLP	PV-240366	1/11/2024		2207552	*	010-00000-0-00000-72000-58000-0	\$11,900.00		
										<i>Legal Services</i>
000501	MOBILE MODULAR	PV-240367	1/19/2024		2518667		010-00000-0-00000-82000-56000-0	\$5,890.50		
										<i>Monthly Billing</i>
000060	Office Depot	PV-240368	1/24/2024		ACCT#28265583	*	010-00000-0-11100-10000-43000-0	\$4,020.00		
										<i>Inst. Supplies</i>
000771	Roche Oil Inc. Roche Oil Inc.	PV-240369	1/24/2024 1/24/2024		187383/542/571/648 187383/542/571/648		010-07230-0-00000-36000-43000-0 010-00000-0-00000-82000-43000-0	\$1,160.27 \$821.16 \$342.00		
										<i>Bus & Maintenance</i>
000124	Small Sch Superintendent Assn	PV-240372	1/24/2024		LIBERTY ELEMENTARY	*	010-00000-0-00000-72000-53000-0	\$1,163.16		
										<i>Annual Billing</i>
000689	SO CAL GAS	PV-240370	1/24/2024		ACCT#19643697063		010-00000-0-00000-82000-55000-0	\$150.00		
										<i>Monthly Billing</i>
000999	SOUTH VALLEY WINTER ARTS ASSN	PV-240371	1/24/2024		5668-12074-38018		010-00000-0-11100-10000-58000-0	\$1,796.49		
										<i>Registration</i>
000695	Thomas Day	PV-240374	1/12/2024		1126		010-00000-0-00000-82000-56000-0	\$100.00		
										<i>Monthly Billing</i>
000288	Tulare County Office of Educ Tulare County Office of Educ Tulare County Office of Educ	PV-240373	1/24/2024 1/24/2024 1/24/2024		1488/1598/0574/1011 1488/1598/0574/1011 1488/1598/0574/1011		010-07200-0-00000-72000-58000-0 010-00000-0-00000-72000-58000-0 010-07200-0-00000-72000-58000-0	\$36,000.00 \$4,689.43 \$3,492.00		
										<i>Intervention Legal Svs. Health Svs</i>

Total Check Amount:

\$400.00

Monthly Billing

Total Check Amount:

\$100.00

Registration

Total Check Amount:

\$1,796.49

Monthly Billing

Total Check Amount:

\$150.00

Monthly Billing

Total Check Amount:

\$1,163.16

Annual Billing

Total Check Amount:

\$1,160.27

Inst. Supplies

Total Check Amount:

\$4,020.00

Monthly Billing

Total Check Amount:

\$5,890.50

Legal Services

Total Check Amount:

\$11,900.00

Annual Billing

Total Check Amount:

\$8,594.69

After School Payment

Total Check Amount:

\$8,594.69

After School Payment

Total Check Amount:

\$8,594.69

After School Payment

*** FINAL ***
 Batch No 325
 Audit

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
000288	Tulare County Office of Educ	PV-240373	1/24/2024		1488/1598/0574/1011		010-07200-0-00000-72000-58000-0	\$15,966.72		Inter-vention
								Total Check Amount:		
								\$60,148.15		
000696	UNWIRED BROADBAND, INC	PV-240375	1/24/2024		01887447		010-00000-0-00000-82000-59000-0	\$349.99		Monthly Resiliency
								Total Check Amount:		
								\$349.99		
000071	US Bank	PV-240377	1/24/2024		ACCT #4246044555562805	*	010-00000-0-00000-71000-43000-0	\$378.84		Office
	US Bank		1/24/2024		ACCT #4246044555562805	*	010-00000-0-00000-82000-43000-0	\$163.45		Maintenance
	US Bank		1/24/2024		ACCT #4246044555562805	*	010-00000-0-11100-10000-43000-0	\$1,155.13		Inst. Supplies
								Total Check Amount:		
								\$1,697.42		
000493	Valley Expetec	PV-240376	1/24/2024		B0001196/B0001197		010-00000-0-00000-72000-58000-0	\$6,313.87		Monthly
	Valley Expetec		1/24/2024		B0001196/B0001197		010-07200-0-00000-72000-58000-0	\$5,156.00		Resiliency
								Total Check Amount:		
								\$11,469.87		

Accounts Payable Final Prelist - 1/25/2024 10:13:55AM

*** FINAL ***

Batch No 325

Audit
Amount Flag EFT

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
Total District Payment Amount:										
								\$122,558.08		

Accounts Payable Final Prelist - 2/8/2024 9:50:57AM

*** FINAL ***

Batch No 326

Amount Flag EFT

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
000585	AT&T	PV-240379	2/5/2024		BAN 9391032124		010-00000-0-00000-82000-59000-0	\$134.55		
	AT&T	PV-240400	2/7/2024		BAN9391028846		010-00000-0-00000-82000-59000-0	\$263.69		
	AT&T	PV-240401	2/7/2024		BAN 9391057381		010-00000-0-00000-82000-59000-0	\$342.18		
								\$740.42		
000687	BSK Associates	PV-240392	1/31/2024		AH02315		010-00000-0-00000-82000-56000-0	\$70.00		
								\$70.00		
000971	CALIFORNIA BUSINESS MACHINES	PV-240381	1/31/2024		341981		010-00000-0-00000-82000-56000-0	\$862.38		
								\$862.38		
000225	CARTOZIANS A/R CONDITIONING	PV-240393	2/1/2024		B/P/010124B		010-81500-0-00000-81100-56000-0	\$4,720.00		
								\$4,720.00		
000617	City of Tulare	PV-240388	2/5/2024		CUST # 251965+001		010-00000-0-00000-82000-55000-0	\$1,113.20		
								\$1,113.20		
000797	CVIN / VAST	PV-240394	2/1/2024		51340		010-00000-0-00000-82000-59000-0	\$292.50		
								\$292.50		
000958	DEERE CREDIT SERVICES INC	PV-240382	2/3/2024		2874745		010-00000-0-00000-91000-74380-0	\$135.24		
	DEERE CREDIT SERVICES INC	2/3/2024			2874745		010-00000-0-00000-91000-74390-0	\$540.30		
								\$675.54		
000982	EAGLESHIELD PEST CONTROL, INC	PV-240402	2/6/2024		110457		010-00000-0-00000-82000-56000-0	\$365.00		
								\$365.00		
000849	Itzel Howard	PV-240397	2/1/2024		SUPPLIES		010-00000-0-11100-10000-43000-0	\$47.73		
								\$47.73		
000166	JORGENSEN COMPANY	PV-240386	1/26/2024		6110605		* 010-00000-0-00000-82000-56000-0	\$1,381.44		
								\$1,381.44		
								\$1,381.44		

Monthly Posing

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*** FINAL ***
 Batch No 326
 Audit

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
000998	KYA SERVICES, LLC	PV-240399	1/31/2024		OE110-0000566-PI		010-32130-0-00000-81100-64000-0	\$37,446.30		
	KYA SERVICES, LLC		1/31/2024		OE110-0000566-PI		010-32180-0-00000-81100-64000-0	\$29,731.00		
	KYA SERVICES, LLC		1/31/2024		OE110-0000566-PI		251-00000-0-00000-82000-64000-0	\$107,709.92		
								\$174,887.22		
000994	LIBERTY ELE. ED. FOUNDATIONI	PV-240398	2/6/2024		JANUARY		010-26000-0-11100-10000-58000-0	\$6,778.74		
								\$6,778.74		
000778	Lisa Nelson	PV-240396	2/1/2024		FOLDERS		010-00000-0-11100-10000-43000-0	\$221.31		
								\$221.31		
000501	MOBILE MODULAR	PV-240391	2/1/2024		R236060		010-00000-0-00000-82000-56000-0	\$2,440.00		
								\$2,440.00		
000250	MORRIS LEVIN & SON	PV-240395	2/1/2024		2311-129073		010-00000-0-00000-82000-43000-0	\$164.74		
								\$164.74		
000771	Roche Oil Inc.	PV-240403	2/6/2024		187892/187792		010-07230-0-00000-36000-43000-0	\$546.04		
								\$546.04		
000064	SISC	PV-240387	2/5/2024		CLIENT ID 71985	*	010-00000-0-00000-00000-95024-0	\$81,145.40		
								\$81,145.40		
000050	Southern California Edison	PV-240383	2/5/2024		ACCT#700055215373		010-00000-0-00000-82000-55000-0	\$9,408.59		
	Southern California Edison	PV-240384	2/5/2024		ACCT#700431744721		010-00000-0-00000-82000-55000-0	\$787.83		
								\$10,196.42		
000288	Tulare County Office of Educ	PV-240378	1/12/2024		241629/241786		010-07200-0-00000-72000-58000-0	\$54,000.00		
	Tulare County Office of Educ		1/12/2024		241629/241786		010-07200-0-00000-72000-58000-0	\$24,837.12		
								\$78,837.12		
000949	Tyger Bates	PV-240389	2/5/2024		1523		010-00000-0-00000-71000-58000-0	\$506.00		
								\$506.00		
000493	Valley Expetec	PV-240390	1/31/2024		B0001275		010-00000-0-00000-82000-43000-0	\$503.36		
								\$503.36		

Track
Teachers Supplies
Monthly Rental
Maintenance
Bus/Maint
Monthly Paying
Monthly Paying
IRC- Mental Health Svcs.
Outside Services
Technology

Accounts Payable Final PreList - 2/8/2024 9:50:57AM

*** FINAL ***

Batch No 326


Audit
Amount Flag EFT

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT
Total District Payment Amount:										
								\$366,494.56		

Vendor No Vendor Name Reference Invoice Separate Batch No 326
 Number Date PO # Invoice No Check Account Code Amount Flag EFT

Batch No 326 Total Accounts Payable: \$366,494.56

The School District hereby orders that payment be made to each of the above vendors in the amounts indicated on the preceding Accounts Payable Final totaling 366,494.56 and the County Office of Education transfer the amounts from the indicated funds of the district to the Check Clearing Fund in order that checks may be drawn from a single revolving fund (Education Code 42631 & 42634).

 Authorizing Signature Date 2/8/2024

Fund Summary	Total
010	\$258,784.64
251	\$107,709.92
Total	\$366,494.56

CSBA UPDATE CHECKLIST – December 2023

District Name: Liberty ESD

Contact Name: _____ Phone: _____ Email: _____

POLICY	TITLE	OPTIONS/BLANKS	ADOPT DATE
BP 0460	Local Control and Accountability Plan	New Law	
AR 0460	Local Control and Accountability Plan	New Law	
BP 0500	Accountability	New Law	
BP 0520	Intervention in Underperforming Schools	New Law	
AR 1220	Citizen Advisory Committees	New law	
BP 1431	Waivers	New Law	
BP 3400	Management of District Assets/Accounts	New Law	
AR 3400	Management of District Assets/Accounts	Update	
BP 5116.2	Involuntary Student Transfers		
BP 5131.2	Bullying	New Law	
AR 5131.2	Bullying	New Law	
AR 5141.21	Administering Medication and Monitoring Health Conditions		
BP 5148.3	Preschool/ Early Childhood Education	New Law	
AR 5148.3	Preschool/ Early Childhood Education	New Law	
BP 6142.8	Comprehensive Health Education		
AR 6142.8	Comprehensive Health Education		
BP 6146.1	High School Graduation Requirements	Fill in Blanks N/A <hr/> <hr/> <hr/>	
BP 6146.4	Differential Graduation and Competency Standards for Students with Disabilities	N/A	
BP 6170.1	Transitional Kindergarten	New Law	
AR 6173.3	Education for Juvenile Court School Students	N/A	

CSBA UPDATE CHECKLIST – December 2023

District Name: Liberty ESD

POLICY	TITLE	OPTIONS/BLANKS	ADOPT DATE
BB 9321	Closed Session	Update	
E(1) 9321	Closed Session	Fill in Blanks <hr/> <hr/> <hr/>	
E(2) 9321	Closed Session	Fill in Blanks <hr/> <hr/> <hr/>	

CSBA POLICY GUIDE SHEET
December 2023

Note: Descriptions below identify revisions made to CSBA's sample board policies, administrative regulations, board bylaws, and/or exhibits. Editorial changes have also been made. Districts and county offices of education should review the sample materials and modify their own policies accordingly.

Board Policy 0460 - Local Control and Accountability Plan

Policy updated to reflect **NEW LAW (SB 114, 2023)** which (1) requires numerous changes to the local control and accountability plan (LCAP) for use in the 2024-25 school year, and (2) adds "long-term English learners," defined by **NEW LAW (SB 141, 2023)** as a student who has not attained English language proficiency within seven years of initial classification as an English learner, as a numerically significant subgroup. Policy also updated to add headers for clarity, align the structure of the policy with the LCAP process, and clarify references to the annual update and budget overview for parents/guardians.

Administrative Regulation 0460 - Local Control and Accountability Plan

Regulation updated to reflect **NEW LAW (SB 114, 2023)** which (1) requires numerous changes to the local control and accountability plan (LCAP) for use in the 2024-25 school year, and (2) adds "long-term English learners," defined by **NEW LAW (SB 141, 2023)** as a student who has not attained English language proficiency within seven years of initial classification as an English learner, as a numerically significant subgroup. Regulation also updated to add "Timeline" section to provide greater specificity regarding required LCAP dates and recommended dates based on best practice, and reflect **NEW LAW (SB 609, 2023)** which requires districts to post the LCAP on the performance overview portion of the California School Dashboard.

Board Policy 0500 - Accountability

Policy updated to reflect that the U.S. Department of Education declined the California Department of Education's (CDE) waiver request that would have allowed for the continued use of modified methods for calculating the Academic and Graduation Rate Indicators, resulting in the California School Dashboard no longer including any modified methods applied to state indicators and all Dashboard Alternative School Status schools being treated the same as all other schools on the Dashboard. Policy also updated to reflect **NEW LAW (SB 114, 2023)** which (1) adds "long-term English learners," defined by **NEW LAW (SB 141, 2023)** as a student who has not attained English language proficiency within seven years of initial classification as an English learner, as a numerically significant subgroup, (2) creates a new basis for technical assistance when the district fails to meet specified data submission requirements, and (3) specifies when the California Collaborative for Educational Excellence (CCEE) will consult with the district and any provider of technical assistance to determine if assistance from CCEE is necessary.

Board Policy 0520 - Intervention in Underperforming Schools

Policy updated to reflect **NEW LAW (SB 114, 2023)** which (1) expands technical assistance based on a numerically significant student subgroup not making sufficient progress towards its local control and accountability plan (LCAP) to include identifying student subgroups that are low performing or experiencing significant disparities from other students or subgroups as identified on the California School Dashboard, (2) creates a new basis for technical assistance when the district fails to meet specified data submission requirements which includes identifying areas of strengths and weaknesses in the identified goals, actions, and services addressed in the LCAP, and reviewing the district's data management policies and collection and submission processes to ensure the submission of accurate data according to the processes and timelines established by the California Department of Education, and (3) specifies when the California Collaborative for Educational Excellence (CCEE) will consult with the district and any provider of technical assistance to determine if assistance from CCEE is necessary.

Administrative Regulation 1220 - Citizen Advisory Committees

Regulation updated to reflect **NEW LAW (SB 1057, 2022)** which exempts special education advisory committees from Brown Act requirements pertaining to open meetings, and instead requires these committees to comply with "mini" Brown Act requirements. Regulation also updated to more closely align with law and to clarify language.

Board Policy 1431 - Waivers

Policy updated to reference **NEW LAW (SB 114, 2023)** which prohibits a waiver request for transitional kindergarten and kindergarten requirements provided for in specified Education Code sections. Policy also updated to provide that advertisement of the notice for the public hearing which is required prior to the Governing Board submitting a waiver request to the State Board of Education includes publishing it on the district's website.

Board Policy 3400 - Management of District Assets/Accounts

Policy updated to reflect **NEW LAW (SB 1439, 2022)** related to conflict of interest from campaign contributions and existing conflict of interest provisions by providing that Governing Board members and district employees involved in the making of contracts on behalf of the district comply with the district's conflict of interest policy as specified in Board Bylaw 9270 - Conflict of Interest. Policy also updated to direct the Superintendent to submit reports of the district's financial status to the Board, in accordance with Board Policy and Administrative Regulation 3460 - Financial Reports and Accountability, and develop additional internal controls to strengthen fraud prevention.

Administrative Regulation 3400 - Management of District Assets/Accounts

Regulation updated to reference Governmental Accounting Standards Board's (GASB) Statement #87 regarding lease accounting and GASB Statement #96 regarding subscription-based information technology agreements. Regulation also updated to clarify that the district should utilize the California Department of Education's standardized account code structure software to develop financial reports, and that the district's accounting system should comply with generally accepted accounting principles prescribed by GASB and meet other state and federal reporting guidelines. Additionally, regulation updated to expand the list of actions that constitute fraud, financial improprieties or irregularities; separate out district and county office of education investigations; clarify that the district cooperate with the County Superintendent of Schools, Fiscal Crisis and Management Assistance Team, law enforcement, or other governmental entities that conduct a fraud investigation; and, consult legal when discussing or disclosing the result of any fraud investigation.

Board Policy 5116.2 - Involuntary Student Transfers

Policy updated to clarify that the policy only addresses involuntary transfers to other schools within the district, add that the determination of where to transfer a student who is the subject of involuntary transfer include a review of the programs to which the student may be involuntarily transferred, provide that the Superintendent or designee ensure that involuntary transfers are made in a nondiscriminatory manner, and reflect **NEW, CALIFORNIA DEPARTMENT OF EDUCATION GUIDANCE** regarding legal requirements and recommended best practices governing voluntary and involuntary students transfers. Policy also updated to clarify requirements for an involuntary transfer of a student who has been convicted of a violent felony or a misdemeanor associated with possession of a firearm, an involuntary transfer to a continuation education program or class within the district, or an involuntary transfer to a community day school within the district. Additionally, policy updated to include information regarding notice and disclosure requirements.

Board Policy 5131.2 - Bullying

Policy updated to reflect **NEW LAW (AB 1078, 2023)** which requires that the district's policy prohibiting discrimination, harassment, intimidation, and bullying include a statement that the policy applies to all acts of the Governing Board and Superintendent in enacting policies and procedures that govern the district. Policy also updated to reference **NEW U.S. DEPARTMENT OF EDUCATION GUIDANCE** addressing discrimination, and reflect CSBA's policy brief, "School Safety: Bullying and Cyberbullying," which encourages district families to model respectful behavior, contribute to a safe and supportive learning environment, and monitor potential causes of bullying.

Administrative Regulation 5131.2 - Bullying

Regulation updated to expand the definition of "cyberbullying" to reflect CSBA's policy brief, "School Safety: Bullying and Cyberbullying." Regulation also updated to add additional measures to prevent bullying as provided in **NEW U.S. SURGEON GENERAL GUIDANCE** by developing a strategic plan for school connectedness and social skills with benchmark tracking, implementing socially based educational

techniques, creating a supportive school environment that fosters belonging, and building social connection into health education courses. Additionally, regulation updated to include digital and media literacy skills in student instruction, as provided in **NEW U.S. SURGEON GENERAL GUIDANCE**, expand the responsibilities of staff as role models for students, and reflect **NEW LAW (AB 2879, 2022)** which requires a social media platform to establish a mechanism that allows any individual, regardless of whether that individual has a profile on the internet-based service, to report cyberbullying. Regulation additionally updated to reflect **NEW LAW (AB 1165, 2023)** which encourages the district to have a student who has been suspended, or for whom other means of correction have been implemented for an incident of racist bullying, harassment, or intimidation, and the victim, to engage in a restorative justice practice suitable to address the needs of both of the students, engage the perpetrator in a culturally sensitive program, and to regularly check on the victim to ensure that the victim is not in danger of suffering from any long-lasting mental health issues.

Administrative Regulation 5141.21 - Administering Medication and Monitoring Health Conditions

Regulation updated to reference **NEW LAW (AB 1722, 2023)** which authorizes districts to hire a licensed vocational nurse following Governing Board approval that a diligent search was conducted for a suitable credentialed nurse, include definitions that pertain to new legislation, and reflect **NEW LAW (AB 1651, 2023)** which (1) includes holders of an Activity Supervisor Clearance Certificate as those for whom districts are required to provide epinephrine auto-injectors if they have volunteered to administer them in an emergency and have received training, and (2) requires schools that provide epinephrine auto-injectors to store them in an accessible location and include that location in annual notices to staff. Regulation also updated to reflect **NEW LAW (AB 1283, 2023)** which authorizes districts to provide emergency stock albuterol inhalers to school nurses or trained personnel who have volunteered, who may use the inhaler to provide emergency medical aid to person(s) suffering, or reasonably believed to be suffering, from respiratory distress, **NEW LAW (SB 114, 2023)** which appropriates funding to county offices of education for the purpose of purchasing and maintaining a sufficient stock of opioid antagonists for districts, **NEW LAW (AB 1166, 2023)** which provides that employees and volunteers who render emergency treatment at the scene of an opioid overdose or suspected opioid overdose by administering an opioid antagonist will not be liable for civil damages resulting from an act or omission, unless such act constitutes gross negligence or willful or wanton misconduct, and **NEW LAW (AB 1810, 2022)** which authorizes a school nurse or a volunteer designated and trained to administer emergency anti-seizure medication to a student diagnosed with seizures, a seizure disorder, or epilepsy who has been prescribed such medication from a health care provider and is suffering from a seizure.

Board Policy 5148.3 - Preschool/ Early Childhood Education

Policy updated to include that that the district may enroll children who are in a transitional kindergarten (TK) or kindergarten program in a California State Preschool Program (CSPP) before and/or after the regular school day in order to provide families with the option of a full-day, high-quality instructional program, and reflect **NEW LAW (SB 141, 2023)** which requires a district that offers TK to early enrollment children to concurrently offer enrollment in a CSPP, if offered by the district, and space permitting.

Administrative Regulation 5148.3 - Preschool/ Early Childhood Education

Regulation updated to reflect **NEW LAW (SB 141, 2023)** which requires a district that offers transitional kindergarten (TK) to early enrollment children to concurrently offer enrollment in a California State Preschool Program (CSPP), and to add the definition of "early enrollment child." Regulation also updated to reflect **NEW LAW (SB 141, 2023)** which revises the enrollment priorities for part-day CSPP programs, and **NEW LAW (AB 116, 2023)** which allows family fees accrued but not collected prior to October 1, 2023, to be forgiven, and not collected. Additionally, Regulation updated to reflect **NEW CALIFORNIA DEPARTMENT OF EDUCATION GUIDANCE** which provides definitions related to suspension.

Board Policy 6142.8 - Comprehensive Health Education

Policy updated to reflect **NEW U.S. SURGEON GENERAL GUIDANCE** related to (1) the importance of social connection in individual and societal health and well-being, and (2) the impact of social media on children and adolescents. Policy also updated to include the requirement that if districts offer health education courses to middle or high school students the course must include mental health instruction.

Administrative Regulation 6142.8 - Comprehensive Health Education

Regulation updated to include the requirement that if districts offer health education courses to middle or high school students the course must include mental health instruction, and to clarify that the "opt-out" right to excuse a student only applies to comprehensive sexual health education, HIV prevention education, and related assessments, and does not apply to instruction, materials, presentations, and programming that discuss specified topics including gender, gender identity, gender expression, sexual orientation, discrimination, harassment, bullying, intimidation, relationships, or family and do not discuss human reproductive organs and their functions.

not Law

Board Policy 6146.1 - High School Graduation Requirements

Policy updated to reflect NEW LAW (AB 714, 2023) which changes "students participating in a newcomer program" to "newcomer students" for purposes of exemptions from district-adopted graduation requirements, and NEW LAW (SB 114, 2023) and NEW LAW (SB 141, 2023) which (1) specifies that the exemption for a student with a disability from all coursework and other requirements adopted by the Board that are in addition to statewide course requirements applies to a student with a disability who entered 9th grade in the 2022-23 school year, (2) revises the eligibility criteria for the exemption, and (3) provides that participation in graduation activities by a student with a disability who is exempted from district-adopted graduation requirements that are in addition to the statewide course requirements may not be construed as a termination of the district's responsibility to provide a free appropriate public education unless the student's individualized education program team has determined that the student has completed the high school experience. Policy also updated to add to the list of permissible retroactive diplomas a former member of the military who is a resident of California and received an honorable discharge, or, a current member of the military who is a resident of California and was a resident of California when entered the military.

Board Policy 6146.4 - Differential Graduation and Competency Standards for Students with Disabilities

Policy updated to reflect NEW LAW (SB 114, 2023) and NEW LAW (SB 141, 2023) which (1) specifies that the exemption for a student with a disability from all coursework and other requirements adopted by the Board that are in addition to statewide course requirements applies to a student with a disability who entered 9th grade in the 2022-23 school year, (2) revises the eligibility criteria for the exemption, and (3) provides that participation in graduation activities by a student with a disability who is exempted from district-adopted graduation requirements that are in addition to the statewide course requirements may not be construed as a termination of the district's responsibility to provide a free appropriate public education unless the student's individualized education program team has determined that the student has completed the high school experience..

Board Policy 6170.1 - Transitional Kindergarten

Policy updated to clarify that a child's eligibility for transitional kindergarten (TK) enrollment may not impact family eligibility for a preschool or childcare program and that the district may admit into the TK program a child whose fifth birthday is after the date specified for admittance for the applicable year provided that upon the recommendation of the Superintendent or designee, the Governing Board determines that enrollment in a TK program is in the child's best interest and the child's parents/guardians approve. Policy also updated to reflect NEW LAW (SB 141, 2023) which (1) requires a district that offers TK to early enrollment children to concurrently offer enrollment in a California State Preschool Program, if offered by the district and space permitting, and (2) requires any classroom that includes an early enrollment child to maintain a classroom enrollment that does not exceed 20 students and an adult-to-student ratio of at least one adult to every 10 students. Additionally, policy updated to include that average TK class size enrollment does not include students who are continuously enrolled in and meet the minimum day requirements for independent study for more than 14 school days in a school year.

Administrative Regulation 6173.3 - Education for Juvenile Court School Students

Regulation updated to reflect NEW LAW (SB 532, 2022) which provides, when a juvenile court school student transfers into a district school, for additional requirements regarding the transfer of coursework and credits, exemptions from district-established graduation requirements, and for the option to remain in school to complete district-established or statewide course requirements.

Board Bylaw 9321 - Closed Session

Bylaw updated to reflect appellate court ruling in *Fowler v. City of Lafayette*, which clarified that when an item is agendaized in closed session based on a threat of litigation made by a person outside of an open meeting and a district official or employee receiving knowledge of the threat made a record of the statement before the meeting, that statement is required to be made available to the public. Bylaw also updated to reference accompanying Exhibit (1) for specific agenda descriptions for closed session items and accompanying Exhibit (2) for descriptions to report out of specified closed session items. Additionally, Bylaw updated for clarity, precision, and consistency.

Exhibit(1) 9321 - Closed Session

Exhibit updated for clarity and precision, and for consistency with changes to the accompanying Board Bylaw.

Exhibit(2) 9321 - Closed Session

Exhibit updated for clarity and precision, and for consistency with changes to the accompanying Board Bylaw.

**Liberty Elementary School District
2024-2025 Draft School Calendar 2**

Jul-24						
S	M	T	W	Th	F	S
	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			

Aug-24						
S	M	T	W	Th	F	S
				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

Sep-24						
S	M	T	W	Th	F	S
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					

Oct-24						
S	M	T	W	Th	F	S
		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		

Nov-24						
S	M	T	W	Th	F	S
					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	

Dec-24						
S	M	T	W	Th	F	S
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				

Important Dates	
School Starts: August 6 (Min Day)	
Back To School Night: August 29 (Min Day)	
Fall Carnival: October 4 (Min Day)	
End of 1st Trimester: October 31	
End of 2 nd Trimester: February 28	
End of 3rd Trimester: May 28	
Parent Conferences: November 19-22	
Christmas Program: December 20 (Min Day)	
Dec. 20 - Last Day Before Winter Break	
Parent Conferences: March 19-21 (Min Day)	
Open House: April 30 (Min Day)	
8th Grade Graduation: May 29	
School Ends/Water Day: May 30 (Min Day)	

School Holidays (No School)	
Labor Day: September 2	
Fair Day: September 11	
Teacher Inservice: October 14	
Veteran's Day: November 11 (observed)	
Thanksgiving Break: November 25-29	
Winter Break: December 23-January 10	
Martin Luther King Jr: January 20	
Lincoln's Birthday: February 10	
President's Day: February 17	
Spring Break: April 14-21	
Memorial Day: May 26	
Non-workday - All employees	

Teacher Workday	
Teacher Inservice: August 6-7	
Welcome All Staff Back Inservice: August 5 (Kristen Winters, Presenter)	
Teacher Inservice: October 14	

Professional Development (Min Days)	
September 4 / September 18	
October 2	
November 6	
February 5	
March 5 / April 2	
May 7	

Jan-25						
S	M	T	W	Th	F	S
			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	

Feb-25						
S	M	T	W	Th	F	S
						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	

Mar-25						
S	M	T	W	Th	F	S
						1
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23	24	25	26	27	28	29
30	31					

Apr-25						
S	M	T	W	Th	F	S
		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			

May-25						
S	M	T	W	Th	F	S
				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

Jun-25						
S	M	T	W	Th	F	S
						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						

Total School Days 180
Staff Development Days 4

REQUIRES BOARD ACTION

This complete, **ORIGINAL** Ballot must be **SIGNED** by the Superintendent or Board Clerk and returned in the enclosed envelope postmarked by the post office no later than **FRIDAY, MARCH 15, 2024**. Only **ONE** Ballot per Board. Be sure to mark your vote "X" in the box. *A PARTIAL, UNSIGNED, PHOTOCOPIED, OR LATE BALLOT WILL NOT BE VALID.*

OFFICIAL 2024 DELEGATE ASSEMBLY BALLOT
SUBREGION 12-A
(Tulare County)

Number of seats: 2 (Vote for no more than 2 candidates)

Delegates will serve two-year terms beginning April 1, 2024 - March 31, 2026

**denotes incumbent*

Walta Gamoian (Visalia USD)

Peter Lara Jr. (Porterville USD)*

Provision for Write-in Candidate Name

School District

Signature of Superintendent or Board Clerk

Title

School District Name

Date of Board Action

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

REGION 12 – 13 Delegates (11 elected/2 appointed)◇

Director: Bill Farris (Sierra Sands USD)

Below is a list of all elected or appointed Delegates from this Region.

Subregion 12-A (Tulare)

Jacqueline Gaebe (Visalia USD), term expires 2024
Peter Lara Jr. (Porterville USD), term expires 2024
Felipe Martinez (Porterville USD), term expires 2025
Cathy Mederos (Tulare Joint Union HSD), term expires 2025

Subregion 12-B (Kern)

Jim Beltran (McFarland USD), term expires 2025
Leigh Ann Cook (Rosedale Union ESD), term expires 2024
Pamela Jacobsen (Standard ESD), term expires 2024
David Manriquez (Kern HSD) ◇, appointed term expires 2025
Kurt Rockwell (Sierra Sands USD), term expires 2025
Steven Rodrigue (Kern HSD)◇, appointed term expires 2024
Pablo Trevino (Lamont ESD), term expires 2025
Vacant, term expires 2025

County Delegate:

Mary Little (Kern COE), term expires 2024

Counties

Tulare (Subregion A)
Kern (Subregion B)

Delegate Assembly Biographical Sketch Form for 2024 Election



Deadline: Sunday, January 7, 2024 | No late submissions accepted

This form is required. An optional, one-page, single-sided, résumé may also be submitted. Do not state "see résumé." Do not re-type this form. Please submit completed form via e-mail to nominations@csba.org by no later than 11:59 p.m. on January 7, 2024. Forms may also be submitted via mail, to CSBA's Executive Office, at 3251 Beacon Blvd., West Sacramento, CA 95691, with a postmark of no later than January 7, 2024. It is the candidate's responsibility to confirm that CSBA has received nomination materials prior to the deadline.

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

Signature: Walta S. Gamoian Date: 11/17/23

Name: Walta S. Gamoian CSBA Region & subregion #: 12-A

District or COE: Visalia Unified School District Years on board: 5 years

Profession: Retired Biology Teacher Contact Number (Cell Home Bus.): (559)936-2307

Primary E-mail: wgamoian@vusd.org

Are you an incumbent Delegate? Yes No If yes, year you became Delegate: _____

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

I have spent my life advocating for children. I believe in public education. ALL children can learn at high levels with the proper resources and supports. CSBA connects with California legislators who make critical decisions for education. I would like to serve as a delegate to ensure that our region is represented and has a voice. In turn, I would come alongside CSBA to connect with California legislators to promote legislation that supports the diversity and values of our region.

I was an educator for 34 years. I bring my experience to make decisions that are best for our students.

I am in my 2nd term as a Visalia Unified Trustee, and I am currently serving as board president. This is a very unified board with diverse thoughts on what is best for children. I have led many public discussions with this board that have been thoughtful, respectful and have resulted in consensus.

I forged relationships with elected officials in my city, county and the state to promote the cause of the children of Visalia.

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

While serving as president along with the 6 other board members and the superintendent, Visalia Unified upholds 3 core beliefs that are foundational to the work of the district. From these core beliefs, we have created a vision and a mission statement. Every decision this board makes is based on these documents. We have also created an award-winning communication team that provides transparency and much needed connection with our community. Each board member has a time of connection and conversation with the community.

During my time as president, this board has been awarded the CSBA Governance Team of the Year.

I have worked with CSBA at state legislative advocacy.

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

One of the biggest challenges facing our board is navigating all the diverse values, opinions and ideologies. What is most important is that all students are learning and are successful. The diverse political issues become superfluous and begin to distract from our main goal that all children will be safe and learn every day. Sometimes, even state laws distract from our main goal. CSBA has held very helpful seminars on how to navigate these issues. My hope is that as a delegate, I can appeal to CSBA for help in addressing these challenges.

WALTA S. GAMOIAN
(559) 936-2307
wgamoian@vusd.org

Objective

To represent Region 12-A on the CSBA Delegate Assembly.

Education

California State University, Fresno
Single Subject Teaching Credential, Biology
Bachelor of Science, Biology

School Board Experience

- Visalia Unified School District Trustee, 2018-Present
 - Board President, December 2022-Present
 - Board Clerk, December 2020-2022
- Co-Lead, Superintendent's Search Committee, 2021-2022
- Guided efforts to develop Collective Board Core Beliefs, Vision and Mission Statements, Strategic Plan through 2030, and Long-Range Facility Plan through 2030
- Recipient of CSBA 2023 Governance Team of the Year

Related Work Experience

Golden West High School, Visalia, 1984-2017
Instructor: Honors Biology, Biology, Chemistry, Health Science, AVID, Driver's Education, College and Careers

- Teaching staff member for Business Finance Academy and Health Careers Academy
- WASC Leadership Team

Selma High School, Selma, 1982-1984
Instructor: English Language Arts, Yearbook

Advisor, Extracurricular Activities

- Class Advisor
- Cheer Advisor
- Link Crew Advisor
- Mock Trial Advisor
- Chess Club Advisor
- Fellowship of Christian Athletes (FCA) Advisor
- Homecoming Carnival Co-Chair
- Young Life Volunteer Leader

Professional Development

- Harvey Silver training: Integrating Learning Styles and Multiple Intelligences and Teaching Styles and Strategies
 - Professional Development Leader training district teaching staff
 - Featured instructor in nationally distributed video series for Association for Supervision and Curriculum Design (ASCD)
- Bioengineering Training, UC San Francisco
- CSBA Masters in Governance
- Board President Workshop

View results

Respondent

28

Anonymous

472:14

Time to complete

1. I have been... *

Appointed

Nominated

2. Your signature indicates your consent to be placed on the ballot and serve as a Delegate, if elected *

Peter Lara, Jr.

3. Full name *

Peter Lara, Jr.

4. Region/subregion *

12A



5. Name of District or COE *

Porterville Unified School District

6. Years on board *

21

7. Profession

Farmer

8. Contact number *

559-361-4959

9. Primary email address *

plara@portervilleschools.org

10. Are you an incumbent Delegate? *

Yes

No

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

My dedication to advancing the quality of education in California's public schools is the cornerstone of my desire to serve as a Delegate. With over two decades of experience on the school board, I bring a wealth of knowledge in educational policy, community engagement, and strategic planning. I have honed my ability to listen actively, engage in meaningful dialogue, and conduct thorough research to make informed decisions. My approach is collaborative, yet I am decisive when it comes to introducing innovative ideas and solutions that could significantly improve educational outcomes. As a Delegate, I would leverage these skills to not only represent but also to enhance the learning experiences and opportunities for our students across the state.

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

My commitment to our community and educational system is reflected in my extensive involvement across various platforms. As a dedicated member of the Porterville Education Foundation, I have worked to secure funding for innovative educational programs. My role on the Agricultural Advisory Board allows me to integrate agricultural awareness into our school curricula, promoting sustainability and student awareness of ecological practices. My experiences with the CSBA's Delegate Assembly and Legislative Committee have deepened my understanding of educational policy and governance. Serving as President of the Porterville Exchange Club, I've led initiatives for youth development and community service. In my capacity as President of the Porterville Unified School Governing Board and Vice President for the Tulare County School Boards Association, I've been at the forefront of strategic planning and policy-making to enhance educational standards within our district and beyond.

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

Navigating the complexities of governance to maximize student success stands as the paramount challenge for school boards. It's essential that board members are not only well-informed but also adept in governance strategies that resonate with our educational objectives. To this end, the CSBA can play a pivotal role by facilitating advanced training programs tailored to enhance the governance skills of board members. These programs should encompass strategic decision-making, policy development, and fiscal management. Moreover, the CSBA can assist school districts in effectively communicating the value of innovative educational programs, ensuring that the broader community is engaged and aware of the exceptional opportunities available in our public schools. This dual approach of empowering board members and promoting district initiatives is crucial for fostering an environment where every student has the tools and support to thrive.

TO: MEMBERS, LIBERTY BOARD OF TRUSTEES

FROM: DR. DEANNA CARDOZA, SUPERINTENDENT

DATE: FEBRUARY 13, 2024

SUBJECT: A.2. APPROVE RESOLUTION #2023-2024-07 RELEASE TEMPORARY CERTIFICATED EMPLOYEES

ACTION

ISSUE: Is it in the best interest of the District for the Board of Trustees to approve Resolution #2023-2024-07 to Release Temporary Certificated Employees.

BACKGROUND: Education Code 44916 requires that at the time of initial employment during each school year, each new temporary employee shall receive a written statement indicating their employment status and salary. This statement shall clearly indicate the temporary nature of the employment and the length of time for which the person is being employed. In addition, Education Code 44954(b) requires that the Board of Education notify temporary employees in positions requiring certification qualifications of the decision to release the employee from such a position for the next succeeding school year. The Resolution authorizes staff to proceed with the release process for employees on temporary contracts.

FISCAL IMPACT: None; approval of this resolution ensures compliance with the requirements of Education Code Section 44954.

BOARD POLICY: Pursuant to Board Policy 4121 Temporary/Substitute Personnel - The Board may release a temporary employee at its discretion.

BOARD GOAL: N/A

ALTERNATIVES: 1. Approve Resolution #2023-2024-07 Release Temporary Certificated Employees
2. Do not approve Resolution #2023-2024-07

RECOMMENDATION: Alternative #1

Prepared by: Dr. Deanna Cardoza, Superintendent

Respectfully Submitted,

Deanna Cardoza, Ed.D.
Superintendent

Board Action: On motion of _____, seconded by _____, the Board of Education:

VOTE:	AYES	NOES	ABSTAIN	ABSENT
Koetsier				
Thorpe				
Tanner				
White				

**BEFORE THE BOARD OF TRUSTEES OF THE
LIBERTY ELEMENTARY SCHOOL DISTRICT
COUNTY OF TULARE, STATE OF CALIFORNIA**

RESOLUTION NO. #2023-2024-07

**RESOLUTION REGARDING NON-REELECTION AND RELEASE FROM
EMPLOYMENT OF TEMPORARY CERTIFICATED EMPLOYEES**

WHEREAS, Education Code section 44954 authorizes the Governing Board to give notice before the end of the school year to any temporary certificated employee who will serve at least 75 percent of the number of days the regular schools of the district are maintained of the Governing Board's decision not to reelect the employee for the next succeeding school year; and

WHEREAS, the employees listed on the attached Exhibit A are temporary certificated employees who have been employed during the 2023-2024 school year; and

WHEREAS, the Board has received a recommendation from the District Superintendent or the Superintendent's designee not to reelect the employees listed on Exhibit A; and

WHEREAS, the Board has discussed the recommendation made by the District Superintendent and concurs in that recommendation;

THEREFORE, BE IT RESOLVED that the Governing Board of the Liberty Elementary School District hereby authorizes the District Superintendent or the Superintendent's designee to notify the employees listed on Exhibit A of this Board's decision not to reelect them for the 2024-2025 school year in accordance with the requirements of Education Code section 44954. The District Superintendent or the Superintendent's designee is further authorized to take any other actions necessary to consummate the intent of this Resolution.

THE FOREGOING RESOLUTION was adopted at a meeting of the Governing

Board of the Liberty Elementary School District held this 13th day of February 2024, by the following vote:

AYES: _____

NOES: _____

ABSENT: _____

ABSTAIN: _____

President Board of Trustees of the
Liberty Elementary School District

I, John Beaver Clerk of the Board of Trustees of the Liberty Elementary School District, do certify that the foregoing Resolution was regularly introduced, passed and adopted by the Board of Trustees at its regular meeting held on February 13, 2024.

Clerk, Board of Trustees of the
Liberty Elementary School District