



N O T I C E

BOARD MEETING OF THE BELLEVUE UNION SCHOOL

DISTRICT BOARD OF TRUSTEES WILL BE HELD ON Tuesday

April 19, 2022, 5:30 PM CLOSED SESSION, 6:30PM OPEN SESSION IN

PERSON at 3150 EDUCATION DR & ZOOM TELECONFERENCE HOSTED BY

BELLEVUE UNION SCHOOL DISTRICT 3150 EDUCATION DRIVE SANTA

ROSA, CA 95407

DATED: April 15, 2022

**David Alexander, Ed.D.
SECRETARY TO THE BOARD
AND DISTRICT SUPERINTENDENT**

POSTED: April 15, 2022

BELLEVUE UNION SCHOOL DISTRICT
Regular Board Meeting
In Person At the 3150 Education Dr. &
Live Streamed Via Zoom linked on the BUSD Homepage
Tuesday, April 19, 2022

As authorized by the Governor's Emergency Executive Order issued on March 12, 2020, the Bellevue Union School District Board of Education will conduct Board of Education meetings by live video conference and in person until further notice. The meeting will be via zoom which can be reached via a link from our Bellevue Union School District homepage @ www.BUSD.org

AGENDA

1. Open Session 5:30pm Video Teleconference Streamed Live Via Zoom on the BUSD Homepage

1.1. Call To Order

1.2. Public Comment on Closed Session Agenda

The Public is invited to address the Board regarding items that are on the Closed Session Agenda. Speakers are limited to 3 minutes each. Because this is the time for the public to comment, it is our time to hear from you. Although the Board will not respond, we want you to know that we are listening to you carefully.

To access the [Public Comment Form](#), please click on the link: [BUSD Digital Comment Form](#) on the agenda or website to submit your comment to Moriah Hart prior to the start of the meeting. All comments received prior to the start of the meeting will be shared during the scheduled public comment portion of the agenda.

2. Adjourn To Closed Session

2.1. Closed Session Agenda

2.1.1. Consideration of Student Matter – Confidential Matter Involved §35146

2.1.1.1. Interdistrict Attendance Permit Appeal

2.1.2. Public Employee Appointment/Employment §54957

2.1.2.1. New Superintendent

2.1.3. Public Employee Discipline/Dismissal/Release § 54957

2.1.4. Public Employment §54957

3. Reconvene to Open Session 6:30pm

3.1. Flag Salute

3.2. Report on Closed Session

3.3. Consider Agenda Adjustment

4. Public Comment

At this time, members of the public may express opinions or make statements regarding issues pertinent to the District. Action may not be taken on statements or testimony made regarding any item not on the agenda, per Government Code 54954.2. There will be a limit of three minutes placed on each individual making a statement and a total 30 minute time allocation. Persons wishing to comment should complete the public comment form prior to the start of the meeting.

To access the [Public Comment Form](#), please click on the link: [BUSD Digital Comment Form](#) on the agenda or website to submit your comment to Moriah Hart prior to the start of the meeting. All comments received prior to the start of the meeting will be shared during the scheduled public comment portion of the agenda.

Because this is the time for the public to comment, it is our time to hear from you. Although Government Code Section 54954.2(a) limits the ability of Board Members to respond to public comments we want you to know that we are listening to you carefully.

5. Informational

- 5.1. COVID-19 Updates, Tracy Whitaker, M.A. Director of Student Services & BUSD COVID-19 Coordinator

6. Discussion/Action

- 6.1. BUSD Board Directed Masking Guidelines

7. Information/Discussion/Action

- 7.1. Discuss educational equity in BUSD LCAP and alignment with Single Plan for Student Achievements (SPSAs) at all BUSD school sites.

8. Action

- 8.1. Consider Approval of Resolution No.13: Authorizing The Issuance And Sale Of 2022 Refunding General Obligation Bonds In The Aggregate Principal Amount Of Not To Exceed \$4,000,000 To Refinance A Portion Of General Obligation Bonds, Election Of 2014, Series A, And Approving All Related Documents And Actions
- 8.2. Consider Approval of Social Emotional Learning Curriculum Adoption
- 8.3. Consider Approval of Tentative Agreement Between Bellevue Union School District And Bellevue Education Association for 2021-22 Negotiations
- 8.4. Consider Approval of Increase to Monthly Compensation for Board Members
- 8.5. Consider Approval of Resolution No. 11: Proclaiming May 2-6, 2022 Teacher Appreciation Week And May 3, 2022 National Teacher Day
- 8.6. Consider Approval of Resolution No. 12: Proclaiming the Week of May 15-21, 2022 as Classified School Employee Week
- 8.7. Consider Approval of Application for Provisional Internship Permit and Employment of Temporary Physical Education Teacher
- 8.8. Consider Approval of Job Description for Federal Program Coordinator
- 8.9. Consider Approval of 2022-23 Board Meeting Dates
- 8.10. Consider Approval of the Employment Contract for the New District Superintendent

8.11. Consider Approval of the Williams Quarterly Uniform Complaint Report Summary (January 1-March 31, 2022)

8.12. Consider Ratification of Bills and Warrants

9. Consent Calendar

9.1. Summer School Chromebook purchase

9.2. Board Meeting Minutes

9.2.1. Special Board Meeting Minutes March 16, 2022

9.2.2. Special Board Meeting Minutes March 12, 2022

9.2.3. Regular Board Meeting Minutes March 8, 2022

9.3. Acknowledge and Accept Grants & Donations

9.3.1. Kawana Student Support Fund of Community Foundation Sonoma County, multicultural 4th grade marimba class, \$1,500 - Kawana Springs

9.3.2. Project Lead the Way/Medtronic Grant, PLTW STEM Launch, \$20,000 - Kawana Springs

9.3.3. Project Lead the Way/Medtronic Grant, PLTW STEM Launch, \$20,000 - Meadow View

9.4. Personnel Activity Log

10. Reports

10.1. California School Employees Association, Chapter 501

10.2. Bellevue Education Association

10.3. Principal Reports

10.4. Board Reports/Board Items

10.4.1. Correspondence - Williams Quarterly Letter

10.5. Superintendent Report

10.5.1. Attendance/Enrollment

11. Planning

May 17, 2022	Regular Board Meeting	5:30pm	BUSD Districts Office 3150 Education Drive and To be live streamed on zoom linked from the District's Homepage: www.busd.org
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12. Reconvene to Closed Session as Needed

Notice

The Bellevue Union School District complies with the Americans with Disabilities Act. Should you require special accommodations, or more information about accessibility, please contact the Superintendent's Office by calling (707)542-5197 x2. All efforts will be made for reasonable accommodations.

Agenda available in Spanish upon request. Please call (707)542-5197 x2. Orden del día disponible en español si se solicita. Por favor llame al (707)542-5197 x2.

*District Employees, parents and community members shall treat each other with civility, courtesy and respect.
Civility Policy (BP 1313)*

Bellevue Union School District

Agenda Item for Board Meeting of April 19, 2022

Agenda Category: Information

Agenda Item Title: COVID-19 Updates

Prepared By: Tracy Whitaker, Director of Student Services & BUSD COVID-19 Coordinator

Background:

Each month at the regularly scheduled Board meetings, Tracy Whitaker, BUSD Director of Student Services & BUSD COVID-19 Coordinator will provide up to date information to the BUSD Governing Board.

Recommended Action:

No action required

Supporting Documents:

none

Bellevue Union School District

Agenda Item for Board Meeting of April 19, 2022

Agenda Category: Action

Agenda Item Title: Consider Approval of Resolution No.13:
Authorizing The Issuance And Sale Of 2022 Refunding General
Obligation Bonds In The Aggregate Principal Amount Of Not To Exceed
\$4,000,000 To Refinance A Portion Of General Obligation Bonds,
Election Of 2014, Series A, And Approving All Related Documents And
Actions

Prepared By: Chris Kim, Ed.D., CBO

Background:

The District has outstanding general obligation bonds which financed voter-approved facilities improvements, including its Election of 2014, Series A Bonds. The Series A Bonds may be refunded for interest cost savings when conditions in the bond market present a refinancing opportunity. At this time, the District has been presented with a Term Sheet by First Foundation Bank, which was identified to the District by Isom Advisors, as financial advisor, and Raymond James & Associates, as placement agent, offering to purchase 2022 Refunding General Obligation Bonds, the proceeds of which will refinance for interest cost savings certain maturities of the 2014A Bonds, which savings will be passed to District property taxpayers with reduced interest rates. The Term Sheet contemplates a federally taxable rate until the August 1, 2024 redemption date, at which time the Term Sheet includes a tax-exempt rate, which the District has the option to exercise and convert at that time. The two-tiered interest rate structure is a Cinderella structure, which permits the District to accept both rates from First Foundation at this time, and still be in compliance with all federal tax laws, including those relating to advance refundings which requires issuance on a taxable basis. The Resolution authorizes District staff to complete all related bond documentation to facilitate the refinancing plan described herein. Certain financial estimates regarding the Bonds are set forth in the final page of the resolution pursuant to SB 450.

Fiscal Impact:

None to the General Fund. GO Bonds are repaid by voter-approved property tax collections. Proceeds will provide funding for voter-approved projects. Issuance costs will be paid from the proceeds of the bonds.

Recommended Action:

Motion to Approve Resolution authorizing issuance of 2022 Refunding General Obligation Bonds in the Principal Amount of Not To Exceed \$4,000,000.

Supporting Documents:

- Resolution 13
- Paying Agent Agreement
- Bond Purchase Agreement
- Escrow Agreement
- Term Sheet of First Foundation

**BELLEVUE UNION SCHOOL DISTRICT
BOARD OF TRUSTEES**

RESOLUTION NO. 13

**RESOLUTION AUTHORIZING THE ISSUANCE AND SALE OF 2022
REFUNDING GENERAL OBLIGATION BONDS IN THE AGGREGATE
PRINCIPAL AMOUNT OF NOT TO EXCEED \$4,000,000 TO REFINANCE A
PORTION OF GENERAL OBLIGATION BONDS, ELECTION OF 2014, SERIES
A, AND APPROVING ALL RELATED DOCUMENTS AND ACTIONS**

WHEREAS, pursuant to the approval of the requisite number of voters of Bellevue Union School District (the "District") of Sonoma County (the "County"), State of California (the "State"), on a bond measure presented on the June 3, 2014 ballot, the District has issued the following series of general obligation bonds to finance voter approved facilities improvements (the "Prior Bonds"):

- Bellevue Union School District (County of Sonoma, State of California) General Obligation Bonds, Election of 2014, Series A, issued on November 13, 2014 in the principal amount of \$4,200,000; and

WHEREAS, the Prior Bonds were issued pursuant to the terms of a Resolution adopted by the Board of Trustees (the "Board") of the District on October 21, 2014 (the "Prior Bond Resolution") and a Paying Agent Agreement, dated as of November 1, 2014 (the "Prior Paying Agent Agreement") by and between the District and The Bank of New York Mellon Trust Company, N.A. (the "Paying Agent"); and

WHEREAS, the Prior Bond Resolution and the Prior Paying Agent Agreement include an optional redemption provision which permits the District to refinance for interest cost savings, at its option, some or all maturities of the Prior Bonds prior to maturity, commencing on August 1, 2024 (the "Redemption Date"); and

WHEREAS, the District, working with Isom Advisors, A Division of Urban Futures, Inc., as municipal advisor (the "Municipal Advisor") and Raymond James & Associates, Inc., as placement agent (the "Placement Agent"), has been presented with a Term Sheet, dated March 28, 2022 (the "Term Sheet"), from the public finance division of First Foundation Bank (including any sub-division or affiliate thereof, "First Foundation"), setting forth terms for the direct purchase by First Foundation of bonds designated the "Bellevue Union School District (Sonoma County, California) 2022 Refunding General Obligation Bonds" (the "Bonds"), the proceeds of which will be applied to refinance for interest cost savings certain maturities of the Prior Bonds, based on the terms and conditions more particularly identified in the Term Sheet on file with the Superintendent; and

WHEREAS, the District is authorized to provide for the issuance and sale of the Bonds under the provisions of Articles 9 and 11 of Chapter 3 of Part 1 of Division 2 of Title 5 of the State Government Code, commencing with Sections 53550 and 53580 of said Code (the "Bond Law"); and

WHEREAS, in order to ensure compliance with all applicable requirements of federal tax law and in order to maximize the interest cost savings achieved by the

refinancing of the Prior Bonds, the Term Sheet includes both federally taxable and tax-exempt interest rates, and provides that the Bonds will initially be issued as advance refunding federally taxable bonds bearing interest at the federally taxable interest rate, however, upon the terms and conditions causing a reissuance of the Bonds on or after the Redemption Date, the Bonds will be reissued as tax-exempt current refunding bonds and as of said date will convert and bear interest at the tax-exempt rate for the remaining term of the Bonds; and

WHEREAS, attached hereto as Appendix A is information relating to the Bonds that has been obtained by the Board and is hereby disclosed and made public in accordance with Government Code Section 5852.1; and

WHEREAS, issuance of the Bonds will be in accordance with California School Boards Association Board Policy 3470 (Debt Issuance and Management); and

WHEREAS, the Board of Trustees (the Board”) desires on this date to authorize the issuance of the Bonds to achieve interest cost savings as described herein, to accept the Term Sheet of First Foundation and to authorize the completion and execution of all documents, certifications and forms relating thereto; and

NOW, THEREFORE, THE BOARD OF TRUSTEES OF THE BELLEVUE UNION SCHOOL DISTRICT DOES HEREBY FIND, DETERMINE AND CERTIFY AS FOLLOWS:

Section 1. Recitals. The Board hereby finds and determines that the foregoing recitals are true and correct.

Section 2. Authorization of Issuance of Refunding Bonds. The Board hereby authorizes the issuance of the Bonds in the aggregate principal amount not to exceed \$4,000,000, in one or more series, under and subject to the terms of the Bond Law, for the purpose of providing funds to refinance certain maturities of the outstanding Prior Bonds in order to achieve interest cost savings that can be passed on to property taxpayers of the District, and to pay costs of issuance. This Resolution constitutes a continuing agreement between the District and the owners of all of the Bonds issued hereunder and then outstanding to secure the full and final payment of principal thereof and interest on all Bonds, subject to the covenants, agreements, provisions and conditions herein contained. The Bonds shall be designated the “Bellevue Union School District (Sonoma County, California) 2022 Refunding General Obligation Bonds,” together with any further designations relating to series or tax status or other variable as may be advisable to identify said Refunding Bonds.

In accordance with Section 53552 of the Bond Law, the Board has determined and hereby confirms that the prudent management of the fiscal affairs of the District requires that it issue the Bonds under the provisions of the Refunding Bond Law without submitting the question of the issuance of the Bonds to a vote of the qualified electors of the District. In addition, pursuant to Section 53587 of the Refunding Bond Law, the Board hereby determines that capitalized interest on the Bonds (if any) shall be reasonably required.

Section 3. Authority to Execute and Deliver Documentation. The Bonds shall be issued in accordance with all requirements of the Refunding Bond Law, applicable federal tax law, and in accordance with the material terms identified in Section 4 hereof.

In connection therewith, the Board hereby approves the following financing documents in substantially the respective forms on file with the Superintendent, together with any changes therein or additions thereto approved by the President of the Board, the Superintendent or the District's Chief Business Official or business manager (each, an "Authorized Officer"), provided that the execution thereof by an Authorized Officer shall be conclusive evidence of such approval:

- Paying Agent Agreement (the "Paying Agent Agreement"), between the District and The Bank of New York Mellon Trust Company N.A., as agent for the County of Sonoma, which is hereby designated as the initial paying agent for the Bonds (the "Paying Agent"), specifying the detailed terms of the Bonds,
- Bond Purchase Agreement between the District and First Foundation specifying the details of the terms of the sale, and
- Escrow Agreement (the "Escrow Agreement") by and between the District and The Bank of New York Mellon Trust Company N.A., serving in the capacity as escrow agent (the "Escrow Agent"), setting forth the terms and conditions relating to the payment and redemption of certain maturities of the Prior Bonds,

Section 4. Material Terms of Bonds. The Bonds shall only be issued if the following terms are met: (a) in accordance with the Refunding Bond Law, the total net interest cost to maturity plus the principal amount of the Bonds does not exceed the total net interest cost to maturity plus the principal amount of the Prior Bonds to be refunded, (b) the final maturity date of the Bonds shall not extend beyond the final maturity date of the Prior Bonds to be refunded, (c) the Bonds shall be issued only as current interest bonds which may be in the form of serial bonds, term bonds, or any combination thereof, and (d) the District has the contractual option to convert the initial federally taxable interest rate to the tax-exempt rate identified in the Term Sheet.

Section 5. Sale of Bonds. The Bonds shall be sold on a private placement basis, pursuant to the Bond Purchase Agreement approved in Section 3. Acceptance and execution of the Term Sheet by the Superintendent is hereby confirmed and ratified by the Board.

Section 6. Execution of Bonds. The Bonds shall be signed by the manual or facsimile signature of the President or Vice President of the Board and shall be attested by the manual or facsimile signature of the Clerk or Secretary of the Board.

Section 7. Security for the Bonds; Pledge of Taxes. The Bonds are general obligations of the District, and the Board has the power to direct the County to levy *ad valorem* taxes upon all property within the District subject to taxation without limitation of rate or amount, for the payment of the principal of and the interest thereon, in accordance with and subject to Sections 15250 and Section 15252 of the Education Code. The District hereby requests the County to levy on all the taxable property in the District, in addition to all other taxes, a continuing direct and *ad valorem* tax annually during the period the Bonds are outstanding in an amount sufficient to pay the principal of and interest on the Bonds when due, which moneys when collected will be paid to the Sonoma County Treasurer and placed in the interest and sinking fund of the District. The District acknowledges that

the Bonds are secured by a statutory lien on all revenues received pursuant to the levy and collection of the voter-approved tax for the Bonds. The District hereby pledges all revenues from the property taxes collected from the levy by the Board of Supervisors of the County for the payment of the Bonds and amounts on deposit in the Debt Service Fund (defined below) to the payment of the principal or redemption price of and interest on the Bonds. This pledge shall be valid and binding from the date hereof for the benefit of the owners of the Bonds and successors thereto. The principal of and interest on the Bonds do not constitute a debt of the County, the State of California, or any of its political subdivisions other than the District, or any of the officers, agents or employees thereof, and neither the County, the State of California, any of its political subdivisions nor any of the officers, agents or employees thereof are liable thereon.

The District shall transmit a copy of this Resolution and the Paying Agent Agreement, together with the debt service schedule for the Bonds, to the office of the County Auditor-Controller and County Treasurer in sufficient time to permit the County to establish tax rates for the Bonds.

Section 8. Establishment of Debt Service Fund; Disbursements. The County Treasurer-Tax Collector or other appropriate County official is requested to establish a debt service fund for the Bonds to be designated the "Bellevue Union School District 2022 Refunding General Obligation Bonds Debt Service Fund" ("Debt Service Fund") which the District officials shall hold as a separate account, distinct from all other funds of the District. All taxes levied by the County, at the request of the District, for the payment of the principal of and interest on the Bonds shall be deposited in the Debt Service Fund by the County promptly upon apportionment of said levy. The County Treasurer shall transfer amounts on deposit in the Debt Service Fund, to the extent necessary to pay the principal of and interest on the Bonds when due and payable, to the Paying Agent which, in turn, shall apply such funds to the payment of the principal of and interest on the Bonds to the registered owner thereof. Any moneys remaining in the Debt Service Fund after the Bonds and the interest thereon have been paid, shall be transferred to any other interest and sinking fund for general obligation bond indebtedness of the District, and in the event there is no such debt outstanding, shall be transferred to the District's general fund, as provided in Section 15234 of the Education Code. As provided in Section 15232 of the Education Code, amounts in the Debt Service Fund shall also be applied to pay the expense of paying the Bonds elsewhere than at the office of the County. Pursuant to such provision, the District hereby authorizes the application of amounts in the Debt Service Fund to reimburse the County for all costs and expenses incurred by it in processing the District's payments from time to time for the services of the Paying Agent which is designated for the Bonds and identified to the County by the District upon the issuance of any series of the Bonds.

Section 9. Investment of Funds. All moneys held in any of funds or accounts established with the County hereunder shall be invested in Authorized Investments (defined below) in accordance with the investment policies of the County, as such policies exist at the time of investment. Obligations purchased as an investment of moneys in any fund or account will be deemed to be part of such fund or account. All interest or gain derived from the investment of amounts in any of the funds or accounts established hereunder will be deposited in the fund or account from which such investment was made, and will be expended for the purposes thereof. The County Treasurer and other officials of the County have no responsibility in the reporting, reconciling and monitoring of the investment of the proceeds of the Bonds. "Authorized Investments" as used herein means

the Investment Pool of the County of Sonoma, the Local Agency Investment Fund, any investments authorized pursuant to Sections 53601 and 53635 of the California Government Code, provided that said investments are part of the County treasury, in accordance with Education Code Section 15146(g). The County Treasurer shall have no responsibility in the reporting, reconciling and monitoring in the investment of proceeds related to any series of the Bonds.

All interest or gain derived from the investment of amounts in any of the funds or accounts established under this Resolution shall be deposited in the fund or account from which such investment was made, and shall be expended for the purposes thereof. The District covenants that all investments of amounts deposited in any fund or account created by or under this Resolution, or otherwise containing proceeds of Bonds issued on a federally tax-exempt basis (if any), shall be acquired and disposed of at the Fair Market Value thereof. For purposes of this Section, the term "Fair Market Value" shall mean, with respect to any investment, the price at which a willing buyer would purchase such investment from a willing seller in a bona fide, arm's length transaction (determined as of the date the contract to purchase or sell the investment becomes binding) if the investment is traded on an established securities market (within the meaning of Section 1273 of the Tax Code) and, otherwise, the term "Fair Market Value" means the acquisition price in a bona fide arm's length transaction (as described above) if (i) the investment is a certificate of deposit that is acquired in accordance with applicable regulations under the Tax Code or (ii) the investment is a United States Treasury Security - State and Local Government Series that is acquired in accordance with applicable regulations of the United States Bureau of Public Debt.

Section 10. Financing Professionals. In connection with the issuance of the Bonds, Isom Advisors, A Division of Urban Futures, Inc. shall serve as the District's municipal advisor, Raymond James & Associates, Inc. shall serve as the District's placement agent, and Jones Hall, A Professional Law Corporation, shall serve as the District's bond counsel. Such engagements are hereby confirmed pursuant to existing engagements agreements or letters, with addendums (if any), needed to reflect the services approved herein.

Section 11. Official Actions. The President of the Board, the Vice President of the Board, the Superintendent, the Chief Business Official, the Clerk and Secretary of the Board, and the written designees of such officials, are each authorized and directed in the name and on behalf of the District to make, execute and deliver all notices, documents, directions and instructions and other necessary documentation which they or any of them might deem necessary or appropriate in order to consummate any of the transactions contemplated by this Resolution, including a placement agent agreement providing for the services of the Placement Agent. In addition, the Superintendent is authorized to make modifications to the terms hereof to accomplish the financing described herein and presented to the Board, and said modifications shall be reflected in the Bond Purchase Agreement and in the Bonds, the terms of which shall be controlling. Whenever in this Resolution any officer of the District is authorized to execute or countersign any document or take any action, such execution, countersigning or action may be taken on behalf of such officer by any person designated by such officer to act on his or her behalf in the case such officer is absent or unavailable.

Section 12. Effective Date. This Resolution shall take effect immediately upon its passage.

I hereby certify that the foregoing Resolution was passed and adopted by the Board of Trustees of the Bellevue Union School District at a regular meeting thereof duly held on April 19, 2022, by a vote of a majority of its members.

Adopted by the following votes:

AYES:

NOES:

ABSENT:

ABSTAIN:

President of the Board

Secretary of the Board

APPENDIX A

REQUIRED DISCLOSURES PURSUANT TO GOVERNMENT CODE SECTION 5852.1*

1. True Interest Cost of the Bonds (Estimated): 2.872%**
2. Finance charge of the Bonds, being the sum of all fees and charges paid to third parties (Estimated): \$200,000
3. Proceeds of the Bonds expected to be received by the District for deposit to the Escrow Fund, net of financing costs (Estimated): \$3,660,753
4. Total Payment Amount for the Bonds, being the sum of all debt service to be paid on the Bonds to final maturity (Estimated): \$5,608,887

**All amounts and percentages are estimates, and are made in good faith by the District based on information available as of the date of adoption of this Resolution with respect to the Bonds. Assumes a principal amount of Bonds of \$3,865,000.*

***Assumes conversion to the Tax-Exempt rate on the Redemption Date of August 1, 2024.*

PAYING AGENT AGREEMENT

**Relating to the Issuance of
\$ _____
Bellevue Union School District
(Sonoma County, California)
2022 Refunding General Obligation Bonds**

This PAYING AGENT AGREEMENT (this “Agreement”), dated as of May 1, 2022 is between BELLEVUE UNION SCHOOL DISTRICT, a school district (the “District”) located in Sonoma County (the “County”) organized and existing under the laws of the State of California (the “State”) and The Bank of New York Mellon Trust Company N.A., acting as agent for the County, the paying agent for the bonds described herein (the “Paying Agent”).

BACKGROUND:

1. Pursuant to the approval of the requisite number of voters of the District on a bond measure presented on the June 3, 2014 ballot, the District has issued the following series of general obligation bonds to finance voter approved facilities improvements (the “Prior Bonds”):

- Bellevue Union School District (County of Sonoma, State of California) General Obligation Bonds, Election of 2014, Series A, issued on November 13, 2014 in the principal amount of \$4,200,000.

2. The Prior Bonds were issued pursuant to the terms of a Resolution adopted by the Board of Trustees of the District on October 21, 2014 (the “Prior Bond Resolution”) and a Paying Agent Agreement, dated as of November 1, 2014 (the “Prior Paying Agent Agreement”) by and between the District and The Bank of New York Mellon Trust Company, N.A. (the “Paying Agent”), all for the purpose of financing voter-approved capital facilities improvements in the District.

3. The Prior Bond Resolution and the Prior Paying Agent Agreement include an optional redemption provision which permits the District to refinance for interest cost savings, at its option, some or all maturities of the Prior Bonds prior to maturity, commencing on August 1, 2024 (the “Redemption Date”).

4. The District has determined by resolution adopted on April 19, 2022 (the “Authorizing Resolution”) to cause the issuance and sale of a series of bonds, to be designated as “Bellevue Union School District 2022 Refunding General Obligation Bonds (Bank Qualified)” (the “Refunding Bonds” or the “Bonds”), the proceeds of which will be applied to refinance for interest cost savings certain maturities of the Prior Bonds, pursuant to the authority contained in the provisions of Articles 9 and 11 of Chapter 3 of Part 1 of Division 2 of Title 5 of the State Government Code, commencing with Sections 53550 and 53580 of said Code (the “Bond Law”).

5. The Bonds have been sold on a private placement basis to First Foundation Public Finance, a Delaware statutory trust and wholly owned subsidiary of

First Foundation Bank (including any sub-division or affiliate thereof, "First Foundation"), and have been issued as of the Closing Date (defined herein) as federally taxable advance refunding bonds bearing Taxable Rate (as defined herein); however, on the Tax-Exempt Conversion Date (as defined herein), the District has the right to elect to change certain material terms of the Bonds as described in Section 2.02 hereof, and as such, cause the reissuance of the Refunding Bonds including a conversion of the interest rate to the Tax-Exempt Rate.

6. Raymond James & Associates, Inc. serves the District as placement agent for the Bonds (the "Placement Agent"), and identified First Foundation as the original purchaser of the Bonds (First Foundation also referred to herein as the "Original Purchaser").

A G R E E M E N T :

In consideration of the foregoing and the material covenants hereinafter contained, the District and the Paying Agent formally covenant, agree and bind themselves as follows:

ARTICLE I

DEFINITIONS; AUTHORITY

SECTION 1.01. *Definitions.* The terms defined in this Section 1.01, as used and capitalized herein, shall, for all purposes of this Agreement, have the meanings given them below, unless the context clearly requires some other meaning.

"Agreement" means this Paying Agent Agreement, as originally entered into and including all amendments hereto and supplements hereof which are duly executed and delivered from time to time in accordance herewith.

"Authorizing Resolution" means the resolution adopted by the Board on April 19, 2022, authorizing the issuance of the Bonds, which is incorporated herein by reference.

"Board" means the Board of Trustees of the District.

"Bond Counsel" means (a) the firm of Jones Hall, A Professional Law Corporation, or (b) any other attorney or firm of attorneys nationally recognized for expertise in rendering opinions as to the legality and tax-exempt status of securities issued by public entities.

"Bond Law" means the provisions of Articles 9 and 11 of Chapter 3 of Part 1 of Division 2 of Title 5 of the State Government Code, commencing with Sections 53550 and 53580 of said Code.

"Bond Purchase Agreement" means the Bond Purchase Agreement between the District and the Bank, under which the Original Purchaser agrees to purchase the Refunding Bonds and pay the purchase price therefor.

"Bonds" means the Bellevue Union School District (Sonoma County, California) 2022 Refunding General Obligation Bonds (Bank Qualified).

"Business Day" means a day of the year, other than a Saturday or Sunday, on which banks are not closed in the city in which the Principal Office of the Paying Agent is located.

"Closing Date" means May 18, 2022, being the date upon which there is a physical delivery of the Bonds in exchange for the amount representing the purchase price of the Bonds by the Original Purchaser.

"Costs of Issuance" means all items of expense directly or indirectly payable by or reimbursable to the District and related to the authorization, issuance, sale and delivery of the Bonds, including but not limited to the costs of preparation and reproduction of documents, filing fees, initial fees and charges of the Paying Agent and its counsel's, legal fees and charges, financial advisor fees and placement agency fees, fees of other consultants and professionals including verification and escrow agent, counsel to the Original Purchaser, and any other cost, charge or fee in connection with the original issuance and sale of the Bonds.

"County" means the County of Sonoma, a political subdivision of the State of California, duly organized and existing under the Constitution and laws of the State of California.

"County Treasurer" means the Treasurer-Tax Collector of Sonoma County, or any authorized deputy thereof.

"Debt Service Fund" means the fund established and held by the Sonoma County Treasurer under Authorizing Resolution.

"Determination of Taxability" means, with respect to any period that the Bonds bear interest at the Tax-Exempt Rate, a final decree or judgment of any federal court or a final action of the Internal Revenue Service or of the United States Treasury Department determining that any interest payable on the Bonds is includable in the gross income of the Owner, although no such decree or action shall be considered final for the purposes of this definition unless the District has been given written notice thereof and, if it is so desired by the District and is legally permissible, the District has been afforded the opportunity to contest the same, at its own expense, either directly or in the name of the Owner and until the conclusion of any appellate review, if sought.

"District" means the Bellevue Union School District, a school district organized under the Constitution and laws of the State of California, and any successor.

"District Representative" means the President of the Board, the Superintendent, the Chief Business Officer, or any other person authorized by resolution of the Board to act on behalf of the District with respect to this Agreement and the Bonds.

"Education Code" means the Education Code of the State of California as in effect on the date of adoption hereof and as amended thereafter.

“Escrow Agent” means The Bank of New York Mellon Trust Company, N.A., in its capacity as escrow agent under the Escrow Agreement, and as paying agent for the Prior Bonds.

“Escrow Agreement” means the document governing the deposit of Refunding Bond proceeds into an escrow fund to provide for the payment and redemption of certain maturities of the Prior Bonds.

“Federal Securities” means (a) any direct general obligations of the United States of America (including obligations issued or held in book entry form on the books of the Department of the Treasury of the United States of America), for which the full faith and credit of the United States of America are pledged; (b) obligations of any agency, department or instrumentality of the United States of America, the timely payment of principal and interest on which are directly or indirectly secured or guaranteed by the full faith and credit of the United States of America.

“Fiscal Year” means any twelve-month period beginning on July 1 in any year and extending to the next succeeding June 30, both dates inclusive, or any other twelve-month period selected and designated by the District as its official fiscal year period pursuant to written notice filed with the Paying Agent and the Owner.

“Institutional Accredited Investor” means an “accredited investor” as described in Section 501(a)(1), (2), (3) or (7) of Regulation D promulgated under the Securities Act.

“Interest Payment Date” means August 1, 2022, and the first day of each succeeding February and August until final maturity of the Bonds.

“Office” means the office or offices of the Paying Agent for the payment of the Bonds and the administration of its duties hereunder, initially being in Dallas, Texas. The Paying Agent may designate and re-designate the Office from time to time by written notice filed with the County Treasurer and the District.

“Original Purchaser” means First Foundation Public Finance, a Delaware statutory trust and wholly owned subsidiary of First Foundation Bank, its successor and assigns, as original purchaser of the Bonds on the Closing Date.

“Outstanding,” when used as of any particular time with reference to Bonds, means all Bonds except (a) Bonds theretofore canceled by the Paying Agent or surrendered to the Paying Agent for cancellation, (b) Bonds paid or deemed to have been paid within the meaning of Section 9.02 and (c) Bonds in lieu of or in substitution for which other Bonds have been authorized, executed, issued and delivered by the District under this Agreement.

“Owner”, whenever used herein with respect to a Bond, means the person in whose name the ownership of such Bond is registered on the Registration Books. The initial Owner shall be the Original Purchaser.

“Paying Agent” means the Paying Agent appointed by the District and acting as paying agent, registrar and authenticating agent for the Bonds, its successors and assigns, and any other corporation or association which may at any time be substituted in its place, as provided in Section 6.01.

“Placement Agent” means Raymond James & Associates, Inc., serving as the placement agent for the Bonds.

“Principal Office” means the office or offices of the Paying Agent for the payment of the Bonds and the administration of its duties hereunder, as such office or offices are identified in a written notice filed with the District by the Paying Agent.

“Prior Bonds” means the following bonds:

- Bellevue Union School District (County of Sonoma, State of California) General Obligation Bonds, Election of 2014, Series A, issued on November 13, 2014 in the principal amount of \$4,200,000.

“Qualified Institutional Buyer” means a “qualified institutional buyer” within the meaning of Rule 144A promulgated under the Securities Act.

“Record Date” means the 15th calendar day of the month preceding an Interest Payment Date, whether or not such day is a Business Day.

“Refunded Bonds” means those maturities of the Prior Bonds refunded with the net proceeds of the Bonds, as more particularly identified in the Escrow Agreement.

“Registration Books” means the records maintained by the Paying Agent for the registration of ownership and transfer of the Bonds under Section 2.08.

“Securities Act” means the Securities Act of 1933, as amended, and the rules, regulations and published interpretations of the Securities and Exchange Commission promulgated thereunder from time to time.

“Refunding Bonds” or “Bonds” means the Bellevue Union School District (Sonoma County, California) 2022 Refunding General Obligation Bonds, at any time Outstanding under this Agreement.

“Tax Code” means the Internal Revenue Code of 1986 as in effect on the Closing Date or (except as otherwise referenced herein) as it may be amended to apply to obligations issued on the Closing Date, together with applicable proposed, temporary and final regulations promulgated, and applicable official public guidance published, under said Code.

“Taxable Rate” means 3.70% per annum based on a 30-day month and a 360-day year for calculating interest.

“Tax-Exempt Rate” means 2.70% per annum based on a 30-day month and a 360-day year for calculating interest.

“Tax-Exempt Conversion Date” means August 1, 2024 and any date during the period of 90 calendar days before August 1, 2024, when interest on the Bonds may be converted to the Tax-Exempt Rate upon satisfaction of the conditions precedent in Section 2.02(e).

"Term Bonds" means the Bonds maturing on August 1, 20____ which are subject to mandatory sinking fund redemption on August 1 of each year in the sinking fund payments amounts and on the dates set forth herein, without premium. The Bonds are issued as a single Term Bond.

"Written Request of the District" means an instrument in writing signed by a District Representative or by any other officer of the District duly authorized to act on behalf of the District under a written certificate of a District Representative.

SECTION 1.02. *Interpretation.*

(a) Unless the context otherwise indicates, words expressed in the singular include the plural and vice versa and the use of the neuter, masculine, or feminine gender is for convenience only and include the neuter, masculine or feminine gender, as appropriate.

(b) Headings of articles and sections herein and the table of contents hereof are solely for convenience of reference, do not constitute a part hereof and do not affect the meaning, construction or effect hereof.

(c) All references herein to "Articles," "Sections" and other subdivisions are to the corresponding Articles, Sections or subdivisions of this Agreement; the words "herein," "hereof," "hereby," "hereunder" and other words of similar import refer to this Agreement as a whole and not to any particular Article, Section or subdivision hereof.

SECTION 1.03. *Authority for this Agreement; Findings.* This Agreement is entered into under the provisions of the Bond Law. The Board has certified that all of the things, conditions and acts required to exist, to have happened or to have been performed precedent to and in the issuance of the Bonds do exist, have happened or have been performed in due and regular time and manner as required by the laws of the State of California.

ARTICLE II

TERMS OF BONDS

SECTION 2.01. *Authorization.* The Board has authorized the issuance of the Bonds under the Authorizing Resolution for the purpose of raising money to refinance for savings certain maturities of the Prior Bonds more particularly identified in the Escrow Agreement and to pay Costs of Issuance. The Bonds shall be issued in the aggregate principal amount of \$_____ under the provisions of the Bond Law, the Authorizing Resolution and this Agreement. The Authorizing Resolution and this Agreement constitute a continuing agreement between the District and the Owners of all of the Outstanding Bonds to secure the full and final payment of principal of and interest on the Bonds, subject to the covenants, agreements, provisions and conditions therein and herein contained. The Bonds are designated the "Bellevue Union School District (Sonoma County, California) 2022 Refunding General Obligation Bonds". Additional designations may be added by an District Representative.

SECTION 2.02. *Terms of Bonds.*

(a) Form; Numbering. The Bonds shall be issued as a single, fully registered Bond, in the denomination of \$_____, without coupons. Bonds shall be lettered and numbered as the Paying Agent may prescribe.

(b) Date of Bonds. The Bonds shall be dated as of the Closing Date.

(c) Maturities: Interest. The Bonds shall be issued as one single Term Bond which matures on August 1, 2044 and bears interest (calculated on the basis of a 360-day comprised of twelve 30-day months) initially at the Taxable Rate (3.70% per annum). The Taxable Rate is subject to Conversion to the Tax-Exempt Rate (2.70% per annum) as described in (e) below. In addition, such rate may be subject to adjustment as provided in Section 7.04.

Each Bond will bear interest from the Interest Payment Date next preceding the date of registration and authentication thereof unless (i) it is authenticated as of an Interest Payment Date, in which event it will bear interest from such date, or (ii) it is authenticated prior to an Interest Payment Date and after the close of business on the preceding Record Date, in which event it will bear interest from such Interest Payment Date, or (iii) it is authenticated on or before the first Record Date, in which event it will bear interest from the dated date of the Bonds; *provided, however*, that if at the time of authentication of a Bond, interest is in default thereon, such Bond will bear interest from the Interest Payment Date to which interest has previously been paid or made available for payment thereon.

(d) Payment. Interest on the Bonds (including the final interest payment upon maturity) and payments of principal upon the mandatory sinking fund redemption thereof is payable by check of the Paying Agent mailed to the Owner thereof at such Owner's address as it appears on the Registration Books at the close of business on the preceding Record Date; provided that at the written request of the Owner, which written request is on file with the Paying Agent as of any Record Date, such payment shall be paid by wire transfer to an account within the United States as shall be specified in such written request. Principal of the Bonds upon the final maturity thereof is payable in

lawful money of the United States of America upon presentation and surrender at the Principal Office of the Paying Agent.

Notwithstanding anything herein to the contrary, so long as the Bonds are owned by the Original Purchaser, (i) the Paying Agent shall pay principal of and interest on the Bonds when due by check or wire transfer in immediately available funds to the Original Purchaser in accordance with such instructions as shall be filed by the Original Purchaser with the Paying Agent from time to time (see the following paragraph), (ii) payments of principal on the Bonds shall be made without the requirement for presentation and surrender of the Bonds by the Original Purchaser, and (iii) the Paying Agent shall not be required to give notice to the Original Purchaser of the redemption of Bonds under Section 2.03(b).

The initial payment instructions are set forth on Appendix C hereto. The Paying Agent can rely on said payment instructions until provided with written notice of a change thereto by the Original Purchaser.

(e) Conversion to Tax-Exempt Rate. The interest rate payable with respect to the Bonds shall convert to the Tax-Exempt Rate, on the Tax-Exempt Conversion Date, upon the happening and the satisfaction of the following conditions precedent to such conversion:

- (i) District Election to Convert. The election in writing provided to the Original Purchaser by the District to convert the interest rate to the Tax-Exempt Rate;
- (ii) Original Purchaser Right to Change Redemption Terms. If the District elects to convert, the Original Purchaser has the right to elect to change the optional redemption terms as of the Tax-Exemption Conversion Date from the terms identified in Section 2.03 hereof. If the Original Purchaser elects in writing to change said redemption terms, it shall identify which of the following two options it has selected:

- (A) OPTION 1: The Bonds are subject to optional redemption, in whole, on any Interest Payment Date, at the price of the principal amount thereof to be redeemed, together with accrued interest to the date fixed for redemption, plus a premium, as set forth in the following table:

Optional Redemption Dates	Prepayment Premium
February 1, 2023 and August 1, 2024	3.0%
February 1, 2025 and August 1, 2026	2.0
February 1, 2027 and August 1, 2028	1.0
February 1, 2029 and thereafter	0.0

- (B) OPTION 2: The Bonds are subject to optional redemption, in whole, on any Interest Payment Date, at the price of the principal amount thereof to be redeemed, together with accrued interest to the date fixed for redemption, as set forth in the following table:

Optional Redemption Dates	Prepayment Premium
August 1, 2028 and thereafter	None.

- (iii) Necessary Document Amendments. The parties hereto execute and deliver appropriate amendments or supplements to this Paying Agent Agreement, if required, subject to the requirements of Section 8.01 hereof relating to amendments hereto;
- (iv) Tax Certificate. Delivery of an arbitrage certificate executed by the District with respect to certain tax matters relating to the interest components of the Bonds after interest with respect thereto is converted to the Tax-Exempt Rate;
- (v) IRS Form 8038G. The filing of an IRS Form 8038-G, executed by the District; and
- (vi) Bond Counsel Opinion. Issuance of an opinion of Bond Counsel to the effect that the conditions precedent set forth above to the conversion of interest with respect to the Bonds the Tax-Exempt Rate have been satisfied and that subject to the District's compliance with certain covenants, interest on the Bonds is excludable from gross income of the owners thereof for federal income tax purposes, is not included as an item of tax preference in computing the alternative minimum tax under the Code. Said opinion shall address bank qualification only in the event the District is able to make the necessary designations in the calendar year of such conversion.

In the event of conversion, the Owner of the Bonds agrees to exchange the original Bond for a Bond containing the terms which apply upon conversion including a new Bond Counsel opinion as referenced in (vi) above.

If the foregoing conditions precedent to the conversion to the Tax-Exempt Rate have not occurred on or prior to August 1, 20____, the interest rate with respect to the Bonds shall remain at the Taxable Rate through final maturity or earlier optional redemption.

From and after the Tax-Exempt Conversion Date (if any), if a Determination of Taxability has occurred, then during the period said Determination of Taxability is in effect, the interest component of the Lease Payments shall be calculated at the Taxable Rate. The District covenants to provide a revised debt service schedule to the County under such circumstances.

SECTION 2.03. Redemption.

(a) *Optional Redemption*. The Bonds are subject to optional redemption, in whole, on any Interest Payment Date, at the price of the principal amount thereof to be

redeemed, together with accrued interest to the date fixed for redemption, plus a premium, as set forth in the following table:

Optional Redemption Dates	Prepayment Premium
February 1, 2023 and August 1, 2024	3.0%
February 1, 2025 and August 1, 2026	2.0
February 1, 2027 and August 1, 2028	1.0
February 1, 2029 and thereafter	0.0

(b) *Mandatory Sinking Fund Redemption.* The Bonds are issued as a single Term Bond maturing on August 1, 2044 which is subject to mandatory sinking fund redemption on the dates and in the amounts as set forth in the following table:

Sinking Fund Redemption Date	Sinking Fund Redemption Amount	Sinking Fund Redemption Date	Sinking Fund Redemption Amount
8/1/23		8/1/34	
8/1/24		8/1/35	
8/1/25		8/1/36	
8/1/26		8/1/37	
8/1/27		8/1/38	
8/1/28		8/1/39	
8/1/29		8/1/40	
8/1/30		8/1/41	
8/1/31		8/1/42	
8/1/32		8/1/43	
8/1/33		8/1/44 (Maturity)	

(c) *Redemption Procedure.* The Paying Agent will cause notice of any redemption to be mailed, first class mail, postage prepaid, at least 20 days but not more than 60 days prior to the date fixed for redemption, to the Owner of the Bonds designated for redemption, at its address appearing on the Registration Books. Such notice may be a conditional notice of redemption and subject to rescission. Such notice shall state the redemption date and the redemption price, and shall require that such Bonds be then surrendered at the Office of the Paying Agent for redemption at the said redemption price, giving notice also that further interest on such Bonds will not accrue from and after the redemption date.

From and after the date fixed for redemption, if notice of such redemption has been duly given and funds available for the payment of the principal of and interest on the Bonds so called for redemption have been duly provided, the Bonds called for redemption will cease to be entitled to any benefit under this Agreement other than the right to receive payment of the redemption price, and no interest will accrue thereon on or after the redemption date specified in the notice. The Paying Agent will cancel all Bonds redeemed under this section and will furnish a certificate of cancellation to the District.

SECTION 2.04. *Form of Bonds.* The Bonds, the form of the Paying Agent's certificate of authentication and registration and the form of assignment to appear thereon shall be substantially in the forms, respectively, with necessary or appropriate variations, omissions and insertions, as permitted or required by this Agreement, as set forth in Appendix A.

SECTION 2.05. *Execution of Bonds.* The Bonds shall be signed by the manual or facsimile signature of the President or Vice President of the Board and shall be attested by the manual or facsimile signature of the Secretary or Clerk of the Board. No Bond shall be valid or obligatory for any purpose or shall be entitled to any security or benefit under this Agreement unless and until the certificate of authentication printed on the Bond is signed by the Paying Agent as authenticating agent.

Only those Bonds bearing a certificate of authentication and registration in the form set forth in Appendix A, executed and dated by the Paying Agent, shall be valid or obligatory for any purpose or entitled to the benefits of this Agreement, and such certificate of the Paying Agent shall be conclusive evidence that the Bonds so registered have been duly authenticated, registered and delivered hereunder and are entitled to the benefits of this Agreement.

SECTION 2.06. *Transfer of Bonds.*

(a) Limitations on Transferability.

(i) Ownership of Bonds may be transferred in whole (not in part), as follows:

- (1) only to a person that is a Qualified Institutional Buyer or Institutional Accredited Investor that is purchasing such Bonds for not more than one account and not with a view to distributing such Bonds,
- (2) only in denominations authorized in Section 2.02(a) of this agreement, and
- (3) only to a purchaser which has signed and filed with the District and the Paying Agent a Purchaser Representation Letter in the form attached hereto as Appendix B.

(ii) No Owner of Bonds shall transfer such Bonds to any person that such Owner does not reasonably believe is a Qualified Institutional Buyer or Institutional Accredited Investor that is purchasing such Bonds for not more than one account and not with a view to distributing such Bonds. The transferor of ownership of Bonds agrees to provide notice to any proposed transferee of such Bonds of the restrictions on transfer described herein.

(iii) Each person to whom ownership of Bonds is transferred pursuant hereto shall be deemed by the acceptance of such ownership to have agreed to be bound by the provisions of this Section.

(iv) The Bonds shall bear a legend describing or referencing the restrictions on transferability set forth in subsection (i) of this subsection.

(b) Transfer Upon Registration Books; New Bonds. Subject to the requirements of subsection (a), any Bond may, in accordance with its terms, be transferred, upon the Registration Books, by the person in whose name it is registered, in person or by his duly authorized attorney, upon surrender of such Bond for cancellation at the Principal

Office at the Paying Agent, accompanied by delivery of a written instrument of transfer in a form approved by the Paying Agent, duly executed. The District and the Paying Agent may charge a reasonable sum for each new Bond issued upon any transfer.

Whenever any Bond or Bonds is surrendered for transfer, the District will execute and the Paying Agent will authenticate and deliver a new Bond or Bonds, for like aggregate principal amount.

(c) Additional Information. The District will furnish, upon request, to the Original Purchaser and to prospective purchasers of the Bonds information with respect to the Bonds satisfying the requirements of Rule 144A(d)(4) under the Securities Act. The District may charge a reasonable sum for copying, mailing and handling.

SECTION 2.07. *Exchange of Bonds*. Subject to the transferability restrictions of Section 2.06, Bonds may be exchanged at the Principal Office of the Paying Agent for a like aggregate principal amount of Bonds of the same maturity. The District and the Paying Agent may charge a reasonable sum for each new Bonds issued upon any exchange (except in the case of any exchange of temporary Bonds for definitive Bonds).

In case any Bond shall become mutilated or be destroyed, stolen or lost, the Paying Agent shall deliver a new Bond of like amount, number, maturity date and tenor in exchange and substitution for and upon cancellation of any such mutilated Bond or in lieu of and in substitution for any such Bond destroyed, stolen or lost, upon the payment of the reasonable expenses and charges of the Paying Agent in connection therewith; and, in the case of a Bond destroyed, stolen or lost, upon filing by the owner with the Paying Agent of evidence satisfactory to the Paying Agent that such Bond was destroyed, stolen or lost, and of the ownership thereof, and upon furnishing to the Paying Agent of an appropriate bond of indemnity in form, substance and amount as may be required by law and as is otherwise satisfactory to the Paying Agent. All Bonds so surrendered to the Paying Agent shall be canceled by it and evidence of such cancellation shall be given to the District. If the mutilated, destroyed, stolen or lost Bond has already matured or been called for redemption in accordance with its terms it shall not be necessary to issue a new Bond prior to payment, provided that the owner shall first provide the Paying Agent with a bond of indemnity as set forth above.

SECTION 2.08. *Registration Books*. The Paying Agent will keep or cause to be kept sufficient books for the registration and transfer of the Bonds, which will at all times be open to inspection by the District upon reasonable notice. Upon presentation for such purpose, the Paying Agent will, under such reasonable regulations as it may prescribe, register or transfer the ownership of the Bonds on the Registration Books.

ARTICLE III

SALE OF BONDS; APPLICATION OF PROCEEDS

SECTION 3.01. *Issuance of Bonds.* Upon the execution and delivery of this Agreement, the District shall execute and deliver the Bonds in the aggregate principal amount of \$_____ to the Paying Agent and the Paying Agent shall authenticate and deliver the Bonds to the Original Purchaser upon receipt of a Written Request of the District therefor.

SECTION 3.02. *Deposit and Application of Proceeds.* On the Closing Date, the proceeds of sale of the Bonds in the amount of \$_____ shall be paid by the Original Purchaser as follows:

- (a) the amount of \$_____ shall be transferred to the Escrow Agent for deposit in the Escrow Fund, to be applied for the purposes set forth in the Escrow Agreement.
- (b) the amount of \$_____ shall be paid by the Original Purchaser to the Paying Agent, acting as custodian, to be applied to pay Costs of Issuance in accordance with Section 3.03 hereof.

SECTION 3.03. *Costs of Issuance Account.* The Paying Agent shall establish a separate account known as the Costs of Issuance Account. There shall be deposited into the Costs of Issuance Account the amount specified in Section 3.02(b). The moneys in the Cost of Issuance Account shall be held uninvested and used solely for the purpose of the payment of Costs of Issuance upon receipt by the Paying Agent of invoices approved by the District, on or after the Closing Date. Any funds remaining in the Costs of Issuance Account on the date which is three months after the Closing Date, shall be transferred by the Paying Agent to the County Treasurer, for deposit to the Debt Service Fund, and the Costs of Issuance Account shall be closed. Prior to such transfer, the Paying Agent will confirm with the District and its financial advisor that the Costs of Issuance Account shall be closed.

ARTICLE IV

SECURITY FOR THE BONDS; PAYMENT OF DEBT SERVICE

SECTION 4.01. *Security for the Bonds.*

(a) The Bonds are general obligations of the District. The Board has the power to direct the County to levy *ad valorem* taxes upon all property within the District that is subject to taxation by the District, without limitation of rate or amount, for the payment of the Bonds and the interest thereon. The District has directed the County in the Authorizing Resolution to levy on all the taxable property in the District, in addition to all other taxes, a continuing direct and *ad valorem* tax annually during the period the Bonds are Outstanding in an amount sufficient to pay the principal of and interest on the Bonds when due, including the principal of any Bonds upon the mandatory sinking fund redemption thereof, which moneys when collected will be paid to the County and placed in the Debt Service Fund.

(b) The principal of and interest on the Bonds does not constitute a debt of the County, the State of California, or any of its political subdivisions other than the District, or any of the officers, agents or employees thereof. Neither the County, the State of California, any of its political subdivisions (other than the District) nor any of the officers, agents or employees thereof are liable for the Bonds. In no event are the principal of and interest on Bonds payable out of any funds or properties of the District other than *ad valorem* taxes levied on taxable property in the District. The Bonds, including the interest thereon, are payable solely from taxes levied under Sections 15250 and 15252 of the Education Code. The District acknowledges that the Bonds are secured by a statutory lien on all revenues received pursuant to the levy and collection of the voter-approved tax for the Bonds.

(c) The District shall transmit a copy of this Agreement, together with the debt service schedule for the Bonds, to the office of the County Auditor-Controller and County Treasurer in sufficient time to permit the County to establish tax rates for the Bonds. In the event that the debt service schedule is revised, the District shall cause to be transmitted to the County Auditor-Controller and County Treasurer in sufficient time for the next property tax levy a revised debt service schedule.

SECTION 4.02. *Establishment of Debt Service Fund.* Pursuant to the Authorizing Resolution, the District has requested that the Sonoma County Treasurer establish, hold and maintain a fund to be known as the "Bellevue Union School District 2022 Refunding General Obligation Bonds Debt Service Fund", as a separate account, distinct from all other funds of the County and the District. All taxes levied by the County, at the request of the District, for the payment of the principal of and interest on the Bonds shall be deposited in the Debt Service Fund by the County promptly upon apportionment of said levy.

SECTION 4.03. *Disbursements from Debt Service Fund.* As provided in the Authorizing Resolution, the County Treasurer shall transfer amounts on deposit in the Debt Service Fund, to the extent necessary to pay the principal of and interest on any series of Bonds when due and payable, to the Paying Agent which, in turn, shall apply such funds to the payment of the principal of and interest on said series of Bonds to the

registered owner thereof. Any moneys remaining in the Debt Service Fund after any of the Bonds and the interest thereon have been paid, shall be transferred to any other interest and sinking fund for general obligation bond indebtedness of the District, and in the event there is no such debt outstanding, shall be transferred to the District's general fund, as provided in Section 15234 of the Education Code. As provided in Section 15232 of the Education Code, amounts in the Debt Service Fund shall also be applied to pay the expense of paying any series of the Bonds elsewhere than at the office of the County. The District has authorized the application of amounts in the Debt Service Fund to reimburse the County for all costs and expenses incurred by it in processing the District's payments from time to time for the services of the Paying Agent which is designated for any series of Bonds.

SECTION 4.04. *Pledge of Taxes.* The District has acknowledged in the Authorizing Resolution that the Bonds are secured by a statutory lien on all revenues received pursuant to the levy and collection of the voter-approved tax for the Bonds. The District has pledged and hereby pledges all revenues from the property taxes collected from the levy by the Board of Supervisors of the County for the payment of the Bonds including the Bonds and amounts on deposit in the Debt Service Fund to the payment of the principal or redemption price of and interest on the Bonds. This pledge shall be valid and binding from the date hereof for the benefit of the owners of the Bonds and successors thereto. The principal of and interest on the Bonds do not constitute a debt of the County, the State of California, or any of its political subdivisions other than the District, or any of the officers, agents or employees thereof, and neither the County, the State of California, any of its political subdivisions nor any of the officers, agents or employees thereof are liable thereon.

SECTION 4.05. *Investments.* All moneys held in any of the funds or accounts established with the County under the Authorizing Resolution will be invested in Authorized Investments in accordance with the investment policies of the County, as such policies exist at the time of investment. Obligations purchased as an investment of moneys in any fund or account will be deemed to be part of such fund or account. All interest or gain derived from the investment of amounts in any of the funds or accounts established hereunder will be deposited in the fund or account from which such investment was made, and will be expended for the purposes thereof. The County Treasurer has no responsibility in the reporting, reconciling and monitoring of the investment of the proceeds of the Bonds.

All interest or gain derived from the investment of amounts in any of the funds or accounts established hereunder shall be deposited in the fund or account from which such investment was made, and shall be expended for the purposes thereof. The District covenants that all investments of amounts deposited in any fund or account created by or under the Authorizing Resolution, or otherwise containing proceeds of the Bonds issued on a federally tax-exempt basis, shall be acquired and disposed of at the Fair Market Value thereof. For purposes of this Section, the term "Fair Market Value" shall mean, with respect to any investment, the price at which a willing buyer would purchase such investment from a willing seller in a bona fide, arm's length transaction (determined as of the date the contract to purchase or sell the investment becomes binding) if the investment is traded on an established securities market (within the meaning of Section 1273 of the Tax Code) and, otherwise, the term "Fair Market Value" means the acquisition price in a bona fide arm's length transaction (as described above) if (i) the investment is a certificate of deposit that is acquired in accordance with

applicable regulations under the Tax Code or (ii) the investment is a United States Treasury Security - State and Local Government Series that is acquired in accordance with applicable regulations of the United States Bureau of Public Debt.

ARTICLE V

FINANCIAL COVENANTS; TAX COVENANTS

SECTION 5.01. *Punctual Payment.* The District will punctually pay, or cause to be paid, the principal of and interest on the Bonds, in strict conformity with the terms of the Bonds and of this Agreement, and it will faithfully observe and perform all of the conditions, covenants and requirements of this Agreement and of the Bonds. In no event is the District obligated to pay principal of and interest on the Bonds out of any funds or properties of the District other than *ad valorem* taxes levied upon all taxable property in the District; provided, however, nothing herein prevents the District from making advances of its own moneys howsoever derived to any of the uses or purposes permitted by law.

SECTION 5.02. *Levy for Payment of Bonds.* The District shall take all steps required by law and by the County to ensure that the Board of Supervisors of the County shall annually levy a tax upon all taxable property in the District sufficient to pay the principal of and interest on the Bonds as and when the same becomes due.

SECTION 5.03. *Books and Accounts.* The District will keep, or cause to be kept, proper books of record and accounts, separate from all other records and accounts of the District in which complete and correct entries shall be made of all transactions relating to the expenditure of the proceeds of the Bonds. Such books of record and accounts shall at all times during business hours be subject to the inspection of the Paying Agent (who shall have no duty to inspect) and the Owners of not less than 10% in aggregate principal amount of the Bonds then Outstanding, or their representatives authorized in writing.

SECTION 5.04. *Protection of Security and Rights of Bond Owners.* The District will preserve and protect the security of the Bonds and the rights of the Bond Owners, and will warrant and defend their rights against all claims and demands of all persons. From and after the sale and delivery of any of the Bonds by the District, the Bonds shall be incontestable by the District.

SECTION 5.05. *Tax Covenants.* The following tax covenants apply to the Refunded Bonds through August 1, 2024, the date upon which the Refunded Bonds will be redeemed with proceeds of the Bonds deposited in the Escrow Fund, and shall apply to the Bonds, but only on or after the Tax Rate Conversion Date and the satisfaction of all conditions of Section 2.02(e). In the event that, upon conversion to the Tax-Exempt Interest Rate, Bond Counsel advises the parties hereto that due to changes in applicable law following the Closing Date, this section shall be amended, the parties agree to undertake such amendment to reflect such changes in law. The District has no liability to the Original Purchaser as a result of changes to the tax covenants set forth below due to changes in applicable law.

(a) Maintenance of Tax-Exemption. The District shall take all actions necessary to assure the exclusion of interest on the applicable series of bonds from the gross income of the owners of said bonds to the same extent as such interest is permitted to be excluded from gross income under the Tax Code as in effect on the Closing Date.

(b) Private Activity Bond Limitation. The District shall assure that the proceeds of the applicable series of bonds are not so used as to cause said bonds to satisfy the private business tests of Section 141(b) of the Tax Code or the private loan financing test of Section 141(c) of the Tax Code.

(c) Federal Guarantee Prohibition. The District shall not take any action or permit or suffer any action to be taken if the result of the same would be to cause any of the applicable series of bonds to be "federally guaranteed" within the meaning of Section 149(b) of the Tax Code.

(d) No Arbitrage. The District shall not take, or permit or suffer to be taken by the Paying Agent or the County or otherwise, any action with respect to the proceeds of the applicable series of bonds which, if such action had been reasonably expected to have been taken, or had been deliberately and intentionally taken, on the applicable original delivery date would have caused said applicable series of bonds to be "arbitrage bonds" within the meaning of Section 148 of the Tax Code.

(e) Rebate of Excess Investment Earnings to United States. The District shall calculate or cause to be calculated excess investment earnings with respect to the applicable series of bonds which are required to be rebated to the United States of America under Section 148(f) of the Tax Code, and shall pay the full amount of such excess investment earnings to the United States of America in such amounts, at such times and in such manner as may be required under the Tax Code, but only if and to the extent such Section 148(f) is applicable to said bonds. Such payments shall be made by the District from any source of legally available funds of the District. The District shall keep or cause to be kept, and retain or cause to be retained for a period of six years following the retirement of the applicable series of bonds, records of the determinations made under this subsection (e). In order to provide for the administration of this subsection (e), the District may provide for the employment of independent attorneys, accountants and consultants compensated on such reasonable basis as the District deems appropriate.

The District may determine to designate, on the Tax-Exempt Conversion Date, the Bonds for purposes of paragraph (3) of section 265(b) of the Tax Code and represents that not more than \$10,000,000 aggregate principal amount of obligations the interest on which is excludable (under section 103(a) of the Tax Code) from gross income for federal income tax purposes (excluding (i) private activity bonds, as defined in section 141 of the Tax Code, except certain qualified 501(c)(3) bonds as defined in section 145 of the Tax Code and (ii) current refunding obligations to the extent the amount of the refunding obligation does not exceed the outstanding amount of the refunded obligation), including the Bonds, has been or will be issued by the District,

including all subordinate entities of the District, during the calendar year of said conversion. If applicable, the District will make said designations in the documentation identified in Section 2.02(e) or as otherwise directed by Bond Counsel.

SECTION 5.06. *Financial Statements; Additional Annual Reporting.* Unless electronically available on a public website including the Electronic Municipal Market Access domain of the Municipal Securities Rulemaking Board, the District shall cause to be prepared and provided to the Original Purchaser complete audited financial statements for the District on an annual basis during the term of the Bonds. A copy of such statements shall be provided or otherwise available on or before March 31 of each year while the Bonds are outstanding, commencing by March 31, 2023.

SECTION 5.07. *Notices Required Under Certain Circumstances.* The District shall provide the Original Purchaser with written notice of any of the following events: (a) the occurrence of a default under any of the documents executed in connection with a debt obligation of the District; or (b) the commencement of litigation in which the District is a named defendant or other governmental proceeding the result of which may have a material adverse effect on the District's finances. Such notice shall be provided within 60 days of the date that the District becomes aware of such action or proceeding.

SECTION 5.08. *No Sovereign Immunity.* The District does not enjoy any rights of immunity on the grounds of sovereign immunity in respect of its obligations under this Agreement. To the extent the District has or hereafter may acquire under any applicable law any rights to immunity from legal proceedings on the grounds of sovereignty, the District hereby waives, but only to the extent permitted by law, such rights to immunity for itself in respect of its obligations arising under or related to this Agreement.

SECTION 5.09. *Further Assurances.* The District will adopt, make, execute and deliver any and all such further agreements, instruments and assurances as may be reasonably necessary or proper to carry out the intention or to facilitate the performance of this Agreement, and for the better assuring and confirming unto the Owners of the Bonds of the rights and benefits provided in this Agreement.

SECTION 5.10. *Records Retention.* The District will retain its records of all accounting and monitoring it carries out with respect to the Bonds for at least three years after the Bonds mature.

ARTICLE VI

THE PAYING AGENT

SECTION 6.01. *Appointment of Paying Agent.* The Bank of New York Mellon Trust Company N.A., as agent for the County, is hereby appointed to act as Paying Agent for the Bonds and, in such capacity, shall also act as registration agent and authentication agent for the Bonds. The Paying Agent undertakes to perform such duties, and only such duties, as are specifically set forth in this Agreement, and even during the continuance of an event of default with respect to the Bonds, no implied covenants or obligations shall be read into this Agreement against the Paying Agent.

The District may remove the Paying Agent initially appointed, with prior written consent of the Original Purchaser (such consent not to be unreasonably withheld) and any successor thereto, and may appoint a successor or successors thereto, but any such successor shall be a bank or trust company doing business and having an office in the State of California, having a combined capital (exclusive of borrowed capital) and surplus of at least \$50,000,000, and subject to supervision or examination by federal or state authority. If such bank or trust company publishes a report of condition at least annually, under law or to the requirements of any supervising or examining authority above referred to, then for the purposes of this Section 6.01 the combined capital and surplus of such bank or trust company shall be deemed to be its combined capital and surplus as set forth in its most recent report of condition so published.

The Paying Agent may at any time resign by giving written notice to the District and the Bond Owners of such resignation. Upon receiving notice of such resignation, the District shall promptly appoint a successor Paying Agent by an instrument in writing within 30 days. Any resignation or removal of the Paying Agent and appointment of a successor Paying Agent will become effective upon acceptance of appointment by the successor Paying Agent.

SECTION 6.02. *Liability of Agents.* The recitals of facts, covenants and agreements herein and in the Bonds contained shall be taken as statements, covenants and agreements of the District, and the Paying Agent assumes no responsibility for the correctness of the same, nor makes any representations as to the validity or sufficiency of this Agreement or of the Bonds, nor shall incur any responsibility in respect thereof, other than as set forth in this Agreement. The Paying Agent is not liable in connection with the performance of its duties hereunder, except for its own negligence or willful misconduct.

In the absence of bad faith, the Paying Agent may conclusively rely, as to the truth of the statements and the correctness of the opinions expressed therein, upon certificates or opinions furnished to the Paying Agent and conforming to the requirements of this Agreement.

The Paying Agent is not liable for any error of judgment made in good faith by a responsible officer of the Paying Agent, in the absence of the gross negligence of the Paying Agent.

The Paying Agent may execute any of the powers hereunder or perform any duties hereunder either directly or by or through agents or attorneys and the Paying Agent shall not be responsible for any misconduct or negligence on the part of any agent or attorney appointed with due care by it hereunder.

SECTION 6.03. *Notice to Agents.* The Paying Agent may rely and shall be protected in acting or refraining from acting upon any notice, resolution, request, consent, order, certificate, report, warrant, bond or other paper or document believed by it to be genuine and to have been signed or presented by the proper party or proper parties. The Paying Agent may consult with counsel, who may be counsel to the District, with regard to legal questions, and the opinion of such counsel shall be full and complete authorization and protection in respect of any action taken or suffered by it hereunder in good faith and in accordance therewith.

Whenever in the administration of its duties under this Agreement the Paying Agent deems it necessary or desirable that a matter be proved or established prior to taking or suffering any action hereunder, such matter (unless other evidence in respect thereof be herein specifically prescribed) may, in the absence of bad faith on the part of the Paying Agent, be deemed to be conclusively proved and established by a certificate of the District, and such certificate shall be full warrant to the Paying Agent for any action taken or suffered under the provisions of this Agreement upon the faith thereof, but in its discretion the Paying Agent may, in lieu thereof, accept other evidence of such matter or may require such additional evidence as to it may seem reasonable.

SECTION 6.04. *Actions Upon Instructions.* The Paying Agent shall have the right to accept and act upon instructions, including funds transfer instructions ("Instructions") given pursuant to this Agreement and delivered using Electronic Means; provided, however, that the District shall provide to the Paying Agent an incumbency certificate listing officers with the authority to provide such Instructions ("Authorized Officers") and containing specimen signatures of such Authorized Officers, which incumbency certificate shall be amended by the District whenever a person is to be added or deleted from the listing. If the District elects to give the Paying Agent Instructions using Electronic Means and the Paying Agent in its discretion elects to act upon such Instructions, the Paying Agent's understanding of such Instructions shall be deemed controlling. The District understands and agrees that the Paying Agent cannot determine the identity of the actual sender of such Instructions and that the Paying Agent shall conclusively presume that directions that purport to have been sent by an Authorized Officer listed on the incumbency certificate provided to the Paying Agent have been sent by such Authorized Officer. The District shall be responsible for ensuring that only Authorized Officers transmit such Instructions to the Paying Agent and that the District and all Authorized Officers are solely responsible to safeguard the use and confidentiality of applicable user and authorization codes, passwords and/or authentication keys upon receipt by the District. The Paying Agent shall not be liable for any losses, costs or expenses arising directly or indirectly from the Paying Agent's reliance upon and compliance with such Instructions notwithstanding such directions conflict or are inconsistent with a subsequent written instruction. The District agrees: (i) to assume all risks arising out of the use of Electronic Means to submit Instructions to the Paying Agent, including without limitation the risk of the Paying Agent acting on unauthorized Instructions, and the risk of interception and misuse by third parties; (ii) that it is fully informed of the protections and risks associated with the various methods of transmitting Instructions to the Paying Agent and that there may be more secure methods of transmitting Instructions than the method(s) selected by the District; (iii) that the security procedures (if any) to be followed in connection with its transmission of Instructions provide to it a commercially reasonable degree of protection in light of its particular needs and circumstances; and (iv) to notify the Paying Agent immediately upon learning of any compromise or unauthorized use of the security procedures.

"Electronic Means" shall mean the following communications methods: e-mail, facsimile transmission, secure electronic transmission containing applicable authorization codes, passwords and/or authentication keys issued by the Paying Agent, or another method or system specified by the Paying Agent as available for use in connection with its services hereunder.

SECTION 6.05. *Compensation; Indemnification.* The District shall pay to the Paying Agent from time to time reasonable compensation for all services rendered under

this Agreement, as set forth in the Paying Agent's current fee schedule then in effect for services as Paying Agent/Bond Registrar for municipalities. In addition, the District also agrees to reimburse the Paying Agent, upon its request, for all reasonable out of pocket expenses, disbursements, and advances, including without limitation the reasonable fees, expenses and disbursements of its agents and attorneys incurred or made by the Paying Agent in connection with entering into and performing under this Agreement or in connection with investigating and defending itself against any claim or liability hereunder. The District shall indemnify the Paying Agent, its officers, directors and employees ("Indemnified Parties") for and hold them harmless against any loss, costs, claims, liability or expense arising out of or in connection with the Paying Agent's acceptance or administration of the Paying Agent's duties hereunder which are not due to the Paying Agent's gross negligence or willful misconduct. No provision of this Agreement shall require the Paying Agent to risk or expend its own funds. The obligations of the District under this Section 6.05 shall survive the termination or discharge of this Agreement.

ARTICLE VII

EVENTS OF DEFAULT AND REMEDIES OF BOND OWNERS

SECTION 7.01. *Events of Default.* Each of the following events shall constitute an Event of Default hereunder:

- (a) default in the due and punctual payment of any installment of the principal of the Bonds when and as the same shall become due and payable;
- (b) default in the due and punctual payment of any installment of interest on the Bonds when and as such interest installment shall become due and payable;
- (c) failure by the District to observe or perform any of the other covenants, agreements or conditions on its part contained in this Agreement or in the Bonds, if such failure has continued for a period of 30 days after written notice thereof, specifying such failure and requesting that it be remedied, has been given to the District; except that, if such failure can be remedied but not within such thirty (30) day period the failure will not constitute an Event of Default if the District commences to cure the failure within such 30-day period and thereafter diligently and in good faith cures the failure in a reasonable period of time, and,
- (d) the filing by the District of a petition or answer seeking reorganization or arrangement under the federal bankruptcy laws or any other applicable law of the United States of America, or if a court of competent jurisdiction shall approve a petition, filed with or without the consent of the District, seeking reorganization under the federal bankruptcy laws or any other applicable law of the United States of America, or if, under the provisions of any other law for the

relief or aid of debtors, any court of competent jurisdiction shall assume custody or control of the District or of the whole or any substantial part of its property.

SECTION 7.02. *Remedies of Bond Owners.* Any Bond Owner has the right, for the equal benefit and protection of all Bond Owners similarly situated:

- (a) by mandamus, suit, action or proceeding, to compel the District and its members, officers, agents or employees to perform each and every term, provision and covenant contained in this Paying Agent Agreement and in the Bonds, and to require the carrying out of any or all such covenants and agreements of the District and the fulfillment of all duties imposed upon it;
- (b) by suit, action or proceeding in equity, to enjoin any acts or things which are unlawful, or the violation of any of the Bond Owners' rights; or
- (c) upon the happening and continuation of any default by the District hereunder or under the Bonds, by suit, action or proceeding in any court of competent jurisdiction, to require the District and its members and employees to account as if it and they were the trustees of an express trust.

SECTION 7.03. *Remedies Not Exclusive.* No remedy herein conferred upon the Owners of Bonds shall be exclusive of any other remedy and that each and every remedy shall be cumulative and shall be in addition to every other remedy given hereunder or thereafter conferred on the Bond Owners.

SECTION 7.04. *Default Payment.* If any payment of principal of or interest on the Bonds is not punctually paid to the Owner of the Bonds, a penalty on said late principal or interest or both for said period shall apply determined at a rate of 3.00% per annum, calculated on a 30/360 day basis (the "Default Payment"). Said rate shall apply only during the period such payment was not paid and in default. The District shall make best efforts to include the amount due as the Default Payment in the next levy by the County and paid to the Owner on the next Payment Date after which the Default Payment was included on the property tax rolls. Debt service on the Bonds including any Default Payment is payable from solely from *ad valorem* property taxes levied and collected by the County for payment thereof, or any other lawfully available funds made available therefor by the District at its option. The District is not liable for any failure of the County to include a Default Payment in the tax levy relating to the Bonds.

SECTION 7.05. *Non-Waiver.* Nothing in this Article VII or in any other provision of Paying Agent Agreement or in the Bonds, affects or impairs the obligation of the District, which is absolute and unconditional, to pay the principal of and interest on the Bonds to the respective Owners of the Bonds at the respective dates of maturity, as herein provided, or affects or impairs the right of action against the District, which is also absolute and unconditional, of such Owners to institute suit against the District to enforce such payment by virtue of the contract embodied in the Bonds.

A waiver of any default by any Bond Owner shall not affect any subsequent default or impair any rights or remedies on the subsequent default. No delay or omission of any Owner of any of the Bonds to exercise any right or power accruing upon any default shall impair any such right or power or shall be construed to be a waiver of any such default or an acquiescence therein, and every power and remedy conferred upon the Bond Owners by this Article VII may be enforced and exercised from time to time and as often as shall be deemed expedient by the Owners of the Bonds.

If a suit, action or proceeding to enforce any right or exercise any remedy be abandoned or determined adversely to the Bond Owners, the District and the Bond Owners shall be restored to their former positions, rights and remedies as if such suit, action or proceeding had not been brought or taken.

ARTICLE VIII

AMENDMENT OF THIS AGREEMENT

SECTION 8.01. *Amendments Effective Without Consent of the Owners.* For any one or more of the following purposes and at any time or from time to time, a Supplemental Agreement may be approved by the District and Paying Agent, which, without the requirement of consent of the Owners of the Bonds, shall be fully effective in accordance with its terms:

- (a) To add to the covenants and agreements of the District in this Agreement, other covenants and agreements to be observed by the District which are not contrary to or inconsistent with this Agreement as theretofore in effect;
- (b) To confirm, as further assurance, any pledge under, and to subject to any lien or pledge created or to be created by, this Agreement, of any moneys, securities or funds, or to establish any additional funds or accounts to be held under this Agreement;
- (c) To cure any ambiguity, supply any omission, or cure or correct any defect or inconsistent provision in this Agreement, which in any event shall not materially adversely affect the interests of the Bond Owners, in the opinion of Bond Counsel filed with the District; or
- (d) To make such additions, deletions or modifications as may be necessary or desirable to assure exemption from federal income taxation of interest on the Bonds, in the opinion of Bond Counsel filed with the District, the Paying Agent and the Original Purchaser.

Notwithstanding the foregoing provisions of this Section 8.01, so long as any of the Bonds are owned by the Original Purchaser, no amendment under this Section 8.01 shall be effective without the prior written consent of the Original Purchaser.

SECTION 8.02. *Amendments Effective With Consent of the Owners.* Any modification or amendment of this Agreement and of the rights and obligations of the District and of the Owners of the Bonds, in any particular, may be made by a

Supplemental Agreement, with the written consent of the Owners of a majority in aggregate principal amount of the Bonds Outstanding at the time such consent is given. No such modification or amendment shall permit a change in the terms of maturity of the principal of any Outstanding Bonds or of any interest payable thereon or a reduction in the principal amount thereof or in the rate of interest thereon, or shall reduce the percentage of Bonds the consent of the Owners of which is required to effect any such modification or amendment, or shall change any of the provisions in Section 7.01 relating to Events of Default, or shall reduce the amount of moneys pledged for the repayment of the Bonds without the consent of all the Owners of such Bonds, or shall change or modify any of the rights or obligations of any Paying Agent without its written assent thereto.

SECTION 8.03. *Prohibited Amendments.* No such modification or amendment shall permit a change in the terms of maturity of the principal of any Outstanding Bonds or of any interest payable thereon or a reduction in the principal amount thereof or in the rate of interest thereon, or shall reduce the percentage of Bonds the consent of the Owners of which is required to effect any such modification or amendment, or shall change any of the provisions in Section 7.01 relating to Remedies, or shall reduce the amount of moneys pledged for the repayment of the Bonds without the consent of all the Owners of such Bonds, or shall change or modify any of the rights or obligations of any Paying Agent without its written assent thereto.

ARTICLE IX

MISCELLANEOUS

SECTION 9.01. *Benefits Limited to Parties.* Nothing in this Agreement, expressed or implied, is intended to give to any person other than the District, the County, the Paying Agent, the Original Purchaser and the Owners of the Bonds, any right, remedy, claim under or by reason of this Agreement. Any covenants, stipulations, promises or agreements in this Agreement contained by and on behalf of the District shall be for the sole and exclusive benefit of the Owners of the Bonds.

SECTION 9.02. *Defeasance.*

(a) Discharge of Agreement. Provided that the District first obtains written confirmation from the Internal Revenue Service, or an opinion of Bond Counsel in form and substance acceptable to the Owner, which provides that doing so will not adversely affect the tax-exempt status of interest on the Bonds, the Bonds may be paid by the District in any of the following ways, provided that the District also pays or causes to be paid any other sums payable hereunder by the District:

- (i) by paying or causing to be paid the principal of and interest on such Bonds, as and when the same become due and payable;
- (ii) by irrevocably depositing, at or before maturity, money or securities in the necessary amount (as provided in Section 9.02(c) hereof) to pay or redeem such Bonds; or
- (iii) by delivering such Bonds to the Paying Agent for cancellation by it.

If the District pays all Outstanding Bonds and also pays or causes to be paid all other sums payable hereunder by the District, then and in that case, at the election of the District (evidenced by a certificate of a District Representative filed with the Paying Agent, signifying the intention of the District to discharge all such indebtedness and this Agreement), and notwithstanding that any Bonds have not been surrendered for payment, this Agreement and other assets made under this Agreement and all covenants, agreements and other obligations of the District under this Agreement shall cease, terminate, become void and be completely discharged and satisfied, except only as provided in Section 9.02(b). In such event, upon request of the District, the Paying Agent shall cause an accounting for such period or periods as may be requested by the District to be prepared and filed with the District and shall execute and deliver to the District all such instruments as may be necessary to evidence such discharge and satisfaction, and the Paying Agent shall pay over, transfer, assign or deliver to the District all moneys or securities or other property held by it under this Agreement which are not required for the payment of Bonds not theretofore surrendered for such payment.

(b) Discharge of Liability on Bonds. Upon the deposit, at or before maturity, of money or securities in the necessary amount (as provided in Section 9.02(c) hereof) to pay or redeem any Outstanding Bond (whether upon or prior to its maturity or the redemption date of such Bond), then all liability of the District in respect of such Bond shall cease and be completely discharged, except only that thereafter the Owner thereof shall be entitled only to payment of the principal of and interest on such Bond by the District, and the District shall remain liable for such payment, but only out of such money or securities deposited with the Paying Agent as aforesaid for such payment, provided further, however, that the provisions of Section 9.02(d) shall apply in all events.

The District may at any time surrender to the Paying Agent for cancellation by it any Bonds previously issued and delivered, which the District may have acquired in any manner whatsoever, and such Bonds, upon such surrender and cancellation, shall be deemed to be paid and retired.

(c) Deposit of Money or Securities with Paying Agent or other Holder. Whenever in this Agreement it is provided or permitted that there be deposited with or held by the Paying Agent or other agent or holder money or securities in the necessary amount to pay any Bonds, the money or securities so to be deposited or held may include money or securities held by the Paying Agent in the funds and accounts established under this Agreement and shall be:

- (i) lawful money of the United States of America in an amount equal to the principal amount of such Bonds and all unpaid interest thereon to maturity, except that, in the case of Bonds which are to be redeemed prior to maturity and in respect of which notice of such redemption has been given as provided herein or provision satisfactory to the Paying Agent has been made for the giving of such notice, the amount to be deposited or held shall be the principal amount or redemption price of such Bonds and all unpaid interest thereon to the redemption date; or
- (ii) Federal Securities (not callable by the issuer thereof prior to maturity) the principal of and interest on which when due, in the

opinion of a certified public accountant delivered to the District, will provide money sufficient to pay the principal or redemption price of and all unpaid interest to maturity, or to the redemption date, as the case may be, on the Bonds to be paid or redeemed, as such principal or redemption price and interest become due, provided that, in the case of Bonds which are to be redeemed prior to the maturity thereof, notice of such redemption has been given as provided herein or provision satisfactory to the Paying Agent has been made for the giving of such notice.

(d) Payment of Bonds After Discharge of Agreement. Notwithstanding any provisions of this Agreement, any moneys held by the Paying Agent for the payment of the principal of, or interest on, any Bonds and remaining unclaimed for two years after the principal of all of the Bonds has become due and payable (whether at maturity or upon a redemption, as provided in this Agreement), if such moneys were so held at such date, or two years after the date of deposit of such moneys if deposited after said date when all of the Bonds became due and payable, shall, upon request of the District, be repaid to the District free from the trusts created by this Agreement, and all liability of the Paying Agent with respect to such moneys shall thereupon cease; *provided, however*, that before the repayment of such moneys to the District as aforesaid, the Paying Agent may (at the cost of the District) first mail to the Owners of all Bonds which have not been paid at the addresses shown on the Registration Books a notice in such form as may be deemed appropriate by the Paying Agent, with respect to the Bonds so payable and not presented and with respect to the provisions relating to the repayment to the District of the moneys held for the payment thereof.

SECTION 9.03. *Execution of Documents and Proof of Ownership by Bond Owners.* Any request, declaration or other instrument which this Agreement may require or permit to be executed by Bond Owners may be in one or more instruments of similar tenor, and shall be executed by Bond Owners in person or by their attorneys appointed in writing.

Except as otherwise herein expressly provided, the fact and date of the execution by any Bond Owner or such Owner's attorney of such request, declaration or other instrument, or of such writing appointing such attorney, may be proved by the certificate of any notary public or other officer authorized to take acknowledgments of deeds to be recorded in the state in which he purports to act, that the person signing such request, declaration or other instrument or writing acknowledged to him the execution thereof, or by an affidavit of a witness of such execution, duly sworn to before such notary public or other officer.

Except as otherwise herein expressly provided, the ownership of registered Bonds and the amount, maturity, number and date of holding the same shall be proved by the Registration Books.

Any request, declaration or other instrument or writing of the Owner of any Bond shall bind all future Owners of such Bond in respect of anything done or suffered to be done by the District or the Paying Agent in good faith and in accordance therewith.

SECTION 9.04. *Waiver of Personal Liability.* No Board member, officer, agent or employee of the District is individually or personally liable for the payment of the principal

of or interest on the Bonds. Nothing herein contained relieves any such Board member, officer, agent or employee from the performance of any official duty provided by law.

SECTION 9.05. *Destruction of Canceled Bonds.* Whenever in this Agreement provision is made for the surrender to the District of any Bonds which have been paid or canceled under the provisions of this Agreement, a certificate of destruction duly executed by the Paying Agent shall be deemed to be the equivalent of the surrender of such canceled Bonds and the District shall be entitled to rely upon any statement of fact contained in any certificate with respect to the destruction of any such Bonds therein referred to.

SECTION 9.06. *Partial Invalidity.* If any section, paragraph, sentence, clause or phrase of this Agreement shall for any reason be held illegal or unenforceable, such holding shall not affect the validity of the remaining portions of this Agreement. The District hereby declares that it would have adopted this Agreement and each and every other section, paragraph, sentence, clause or phrase hereof and authorized the issue of the Bonds pursuant thereto irrespective of the fact that any one or more sections, paragraphs, sentences, clauses, or phrases of this Agreement may be held illegal, invalid or unenforceable. If, by reason of the judgment of any court, the District is rendered unable to perform its duties hereunder, all such duties and all of the rights and powers of the District hereunder shall be assumed by and vest in the Deputy Superintendent of the District for the benefit of the Bond Owners.

SECTION 9.07. *Payment on Business Days.* Whenever in this Agreement any amount is required to be paid on a day which is not a Business Day, such payment shall be required to be made on the Business Day immediately following such day, provided that interest shall not accrue from and after such day.

SECTION 9.08. *Notices.* Any notice, request, complaint, demand or other communication under this Agreement shall be given by first class mail or personal delivery to the party entitled thereto at its address set forth below, or by telecopy or other form of telecommunication, at its number set forth below. Notice shall be effective either (a) upon transmission by facsimile transmission or other form of telecommunication, (b) 48 hours after deposit in the United States mail, postage prepaid, or (c) in the case of personal delivery to any person, upon actual receipt. Notwithstanding the foregoing, e-mailed notices may be provided and will be deemed effective and received upon a reply response from the recipient confirming receipt, but delivery of the original notice via mail or personal delivery shall be provided to the recipient within five days thereof. The District or the Paying Agent may, by written notice to the other parties, from time to time modify the address or number to which communications are to be given hereunder.

If to the District:

Bellevue Union School District
3150 Education Drive,
Santa Rosa, California 95407
Attn: Superintendent

If to the Paying Agent:

County of Sonoma Treasurer
Care of: The Bank of New York Mellon Trust
Company N.A., its agent
2001 Bryan Street, 10th Floor
Dallas, Texas 75201
Attn: Global Corporate Trust

If to the Original Purchaser: First Foundation Public Finance,
First Foundation Bank
2233 Douglas Blvd Suite 300
Roseville, CA. 95661
Attn: Public Finance
Phone: (916) 724-2423

SECTION 9.10. *Unclaimed Moneys.* Anything in this Agreement to the contrary notwithstanding, subject to the laws of the State of California, any moneys held by the Paying Agent for the payment and discharge of any of the Bonds which remain unclaimed for two years after the date when such Bonds have become due and payable, either at their stated maturity dates, if such moneys were held by the Paying Agent at such date, or for two years after the date of deposit of such moneys if deposited with the Paying Agent after said date when such Bonds become due and payable, shall, at the Written Request of the District, be repaid by the Paying Agent to the District, as its absolute property and free from trust, and the Paying Agent shall thereupon be released and discharged with respect thereto and the Bond Owners shall look only to the District for the payment of such Bonds; *provided, however,* that before being required to make any such payment to the District, the Paying Agent shall, at the expense of the District, cause to be mailed to the Owners of all such Bonds, at their respective addresses appearing on the Registration Books, a notice that said moneys remain unclaimed and that, after a date named in said notice, which date shall not be less than 30 days after the date of mailing of such notice, the balance of such moneys then unclaimed will be returned to the District.

SECTION 9.11. *Servicing; Appointment of Servicer.* The Original Purchaser may engage a servicer, and collaterally assign some of all of its rights under this Agreement, to act on behalf of the Original Purchaser under this agreement as the "Servicer." The Original Purchaser shall give written notice to the District and the Paying Agent of its appointment, termination, removal or replacement of any Servicer, which notice shall identify which rights hereunder have been assigned, and the parties may rely on any such notice until any subsequent notice is given. The Original Purchaser is under no obligation to appoint a Servicer; if at any time a Servicer has not been designated by the Original Purchaser, any references to the "Servicer" herein shall refer to the Original Purchaser. Any opinion or certificate provided for herein that is directed to the Servicer shall also be directed to, and may be relied upon by, the Original Purchaser. The Original Purchaser understands and agrees that any Servicer to which it resells or otherwise transfers the Bonds must meet and satisfy the requirements of Section 2.06 and that such transfer must be in whole and not in part.

The Original Purchaser shall be solely responsible for providing the purchase price of the Bonds. From and after the Closing Date, if the Original Purchaser has provided written notice that it has appointed a Servicer, the District and the Paying Agent acknowledge and agree that if all rights of the Original Purchaser have been assigned thereunder, the Servicer shall exercise all of the rights and remedies of the Original Purchaser under this Agreement, shall receive all reports, statements, notices and other communications delivered to the Original Purchaser under this Agreement and shall be entitled to all of the protections afforded the Original Purchaser under this Agreement.

SECTION 9.12. *Execution in Several Counterparts.* This Agreement may be executed in any number of counterparts and each of such counterparts shall for all purposes be deemed to be an original; and all such counterparts, or as many of them as the District and the Paying Agent shall preserve undestroyed, shall together constitute but one and the same instrument.

SECTION 9.13. *Waiver of Jury Trial; Agreement for Judicial Reference; No Sovereign Immunity.* To the fullest extent permitted by law, the District hereby waives its right to trial by jury in any action, proceeding and/or hearing on any matter whatsoever arising out of, or in any way connected with, the Bonds, this Agreement or any documents relating to the Bonds or this Agreement, or the enforcement of any remedy under any law, statute, or regulation. To the extent such waiver is not enforceable, the District hereby consents to the adjudication of any and all such matters pursuant to Judicial Reference as provided in Section 638 of the California Code of Civil Procedure, and the judicial referee shall be empowered to hear and determine any and all issues in such Reference whether fact or law. The District hereby represents that it does not possess and will not invoke a claim of sovereign immunity for disputes arising out of contractual claims relating to the Bonds or this Agreement.

SECTION 9.14. *Governing Law.* This Agreement shall be construed and governed in accordance with the laws of the State of California.

Section 9.15 *Availability of Documentation.* This Paying Agent Agreement and other documentation related to the Bonds may be posted by the District on a national public bond market repository provided that certain information is redacted by the District as reasonably directed by the Original Purchaser. Items that should be redacted include signatures/names, account numbers, wire transfer and payment instructions and any other data that could be construed as sensitive information.

Section 9.16 *Electronic Signatures.* The parties hereto agree that the transaction described in this Agreement may be conducted by electronic means. Each party agrees and acknowledges that it is such party's intent, that if such party signs this Agreement using an electronic signature, it is signing, adopting and accepting this Agreement and that signing this Agreement using an electronic signature is the legal equivalent of having placed the undersigned officer's handwritten signature on this Agreement on paper. Each party acknowledges that it is being provided with an electronic or paper copy of this Agreement in a usable format.

[Signatures appear on the following page.]

IN WITNESS WHEREOF, BELLEVUE UNION SCHOOL DISTRICT has caused this Agreement to be signed in its name by its duly authorized officers and THE BANK OF NEW YORK MELLON TRUST COMPANY N.A., has caused this Agreement to be signed in its corporate name by its duly authorized officer, all as of the day and year first above written.

BELLEVUE UNION SCHOOL DISTRICT

By _____
Chief Business Officer

**THE BANK OF NEW YORK MELLON
TRUST COMPANY N.A., AS AGENT FOR
THE COUNTY OF SONOMA**
as Paying Agent

By _____
Authorized Officer

APPENDIX A
FORM OF BOND

REGISTERED BOND NO. _____

\$_____

BELLEVUE UNION SCHOOL DISTRICT
(Sonoma County, California)
2022 REFUNDING GENERAL OBLIGATION BOND
(Federally Taxable)

INTEREST RATE PER ANNUM	MATURITY DATE:	DATED DATE:
3.70%*	____ 1, 20__	May __, 2022

*Rate subject to conversion to the Tax-Exempt Rate of 2.70% per annum as described herein.

REGISTERED OWNER: [FORM ONLY]

PRINCIPAL AMOUNT: *** [form only] _____ DOLLARS***

THIS BOND IS SUBJECT TO RESTRICTIONS ON TRANSFERABILITY AND MAY ONLY BE TRANSFERRED IN ACCORDANCE WITH THE PROVISIONS SET FORTH HEREIN. NO TRANSFER, SALE OR OTHER DISPOSITION OF THIS BOND MAY BE MADE EXCEPT TO A PERSON THAT IS A QUALIFIED INSTITUTIONAL BUYER OR AN INSTITUTIONAL ACCREDITED INVESTOR.

THE INTEREST ON THIS BOND IS SUBJECT TO CONVERSION FROM THE ANNUAL INTEREST RATE IDENTIFIED ABOVE TO A TAX-EXEMPT RATE OF 2.70% PER ANNUM UPON CERTAIN CONDITIONS PRECEDENT DESCRIBED IN THIS BOND.

The Bellevue Union School District (the "District"), located in the County of Sonoma (the "County"), for value received, hereby promises to pay to the Registered Owner named above, or registered assigns, the principal amount on the Maturity Date, each as stated above, and interest thereon, calculated on a 30/360 day basis, until the principal amount is paid or provided for, at the Interest Rate stated above (subject to adjustment as provided in the following paragraph), such interest to be paid on February 1 and August 1 of each year, commencing August 1, 2022 (the "Interest Payment Dates"). This Bond will bear interest from the Interest Payment Date next preceding the date of authentication hereof, unless (a) it is authenticated as of a business day following the 15th day of the month immediately preceding any Interest Payment Date and on or before such Interest Payment Date, in which event it shall bear interest from such Interest Payment Date, or (b) it is authenticated on or before July 15, 2022, in which event it shall bear interest from the Dated Date referred to above.

Subject to the following paragraph, principal and interest are payable in lawful money of the United States of America to the person in whose name this Bond is registered (the "Registered Owner") on the Bond registration books maintained by the Paying Agent, initially being the County of Sonoma through The Bank of New York Mellon Trust Company, N.A., Dallas, Texas, as its agent (the "Paying Agent"). Principal hereof is payable upon presentation and surrender of this Bond at the office of the Paying Agent. Interest hereon is payable by check mailed by the Paying Agent on each Interest Payment Date to the Registered Owner of this Bond by first-class mail at the address appearing on the Bond registration books at the close of business on the preceding Record Date; provided that at the written request of the Registered Owner, which written request is on file with the Paying Agent as of any Record Date, such payment shall be paid by wire to such account as shall be specified in such written request. Principal of the Bonds upon the final maturity thereof is payable in lawful money of the United States of America upon presentation and surrender at the Principal Office of the Paying Agent.

Notwithstanding the foregoing, so long as this Bond is owned by First Foundation Public Finance, a Delaware statutory trust and wholly owned subsidiary of First Foundation Bank, its successor and assigns (the "Original Purchaser"), the following shall apply: (a) this Bond is not required to be presented and surrendered to the Paying Agent for payment at any time prior to the final maturity thereof, and (b) the Paying Agent will pay the principal of and interest on this Bond by wire transfer to the Original Purchaser in accordance with wire transfer instructions provided by the Original Purchaser to the Paying Agent from time to time; provided that principal on this Bond which is payable at maturity shall be made only upon presentation and surrender hereof at the corporate trust office of the Paying Agent as set forth in the preceding paragraph.

This Bond is one of a duly authorized issue of bonds of the District designated as "Bellevue Union School District 2022 Refunding General Obligation Bonds (Federally Taxable)" (the "Bonds") in an aggregate principal amount of \$_____ issued as one term bond subject to mandatory sinking fund redemption as provided below and all issued pursuant to the provisions of Sections 53550 et seq. of the California Government Code (the "Bond Law"), pursuant to a resolution of the District adopted April 19, 2022 (the "Resolution"), authorizing the issuance of the Bonds. Reference is hereby made to the Resolution, the Paying Agent Agreement, dated May ___, 2022, by and between the District and the Paying Agent (the "Paying Agent Agreement") and the Bond Law for a description of the terms on which the Bonds are issued and the rights thereunder of the owners of the Bonds and the rights, duties and immunities of the Paying Agent and the rights and obligations of the District thereunder, to all of the provisions of which Resolution and Paying Agent Agreement the Owner of this Bond, by acceptance hereof, assents and agrees. All capitalized terms herein shall have the same meaning as the capitalized terms in the Resolution.

The Bonds have been issued to refund on an advance basis certain maturities of the District's outstanding general obligation bonds.

The Bonds are general obligations of the District. The Board has the power to direct the County to levy *ad valorem* taxes upon all property within the District that is subject to taxation by the District, without limitation of rate or amount, for the payment of the Bonds and the interest thereon. The Bonds, including the interest thereon, are payable solely from taxes levied under Sections 15250 and 15252 of the California Education Code. The Bonds are secured by a statutory lien on all revenues received pursuant to the levy and collection of the voter-approved tax for the Bonds.

The principal of and interest on this Bond do not constitute a debt of the County, the State of California, or any of its political subdivisions other than the District, or any of the officers, agents and employees thereof, and none of the County, the State of California, any of its political subdivisions, or any of the officers, agents and employees thereof shall be liable hereon. Except as provided in the Resolution, in no event shall the principal of and interest on this Bond be payable out of any funds or properties of the District other than *ad valorem* taxes levied upon all taxable property in the District.

The Bonds of this issue are issuable only as a single, fully registered Bond in the original denomination of \$_____ principal amount. This Bond is exchangeable and transferable for Bonds of other authorized denominations at the principal corporate trust office of the Paying Agent, by the Registered Owner or by a person legally empowered to do so, upon presentation and surrender hereof to the Paying Agent, together with a request for exchange or an assignment signed by the Registered Owner or by a person legally empowered to do so, in a form satisfactory to the Paying Agent, all subject to the terms, limitations and conditions provided in the Bond Resolution. Any tax or governmental charges shall be paid by the transferor. The District and the Paying Agent may deem and treat the Registered Owner as the absolute owner of this Bond for the purpose of receiving payment of or on account of principal or interest and for all other purposes, and neither the District nor the Paying Agent shall be affected by any notice to the contrary.

The Bonds are subject to optional redemption, in whole, on any Interest Payment Date, at the price of the principal amount thereof to be redeemed, together with accrued interest to the date fixed for redemption, plus a premium, as set forth in the following table:

Optional Redemption Dates	Prepayment Premium
February 1, 2023 and August 1, 2024	3.0%
February 1, 2025 and August 1, 2026	2.0
February 1, 2027 and August 1, 2028	1.0
February 1, 2029 and thereafter	0.0

The Bonds are subject to mandatory sinking fund redemption on the dates and in the amounts as set forth in the following table:

Sinking Fund Redemption Date	Sinking Fund Redemption Amount	Sinking Fund Redemption Date	Sinking Fund Redemption Amount
8/1/23		8/1/34	
8/1/24		8/1/35	
8/1/25		8/1/36	

8/1/26		8/1/37	
8/1/27		8/1/38	
8/1/28		8/1/39	
8/1/29		8/1/40	
8/1/30		8/1/41	
8/1/31		8/1/42	
8/1/32		8/1/43	
8/1/33		8/1/44 (Maturity)	

If any such Term Bonds are redeemed pursuant to the optional redemption provisions described above, the total amount of all future sinking fund payments with respect to such Term Bonds shall be reduced by the aggregate principal amount of such Term Bonds so redeemed, to be allocated among such payments on a pro rata basis in integral multiples of \$5,000 principal amount or on such other basis as the District may determine as set forth in written notice given by the District to the Paying Agent.

The Paying Agent will cause notice of any optional redemption to be mailed, first class mail, postage prepaid, at least 20 days but not more than 60 days prior to the date fixed for redemption, to the Owner of this Bond designated for redemption, at its address appearing on the Registration Books. Such notice may be a conditional notice of redemption and subject to rescission. Such notice shall state the redemption date and the redemption price, and shall require that such Bonds be then surrendered at the Office of the Paying Agent for redemption at the said redemption price, giving notice also that further interest on such Bonds will not accrue from and after the redemption date. Scheduled mandatory sinking fund redemptions in accordance with the foregoing table do not require notice of redemption to the Owner of this Bond.

Neither the District nor the Paying Agent will be required: (a) to issue or transfer any Bond during a period beginning with the opening of business on the 15th calendar day next preceding either any Interest Payment Date or any date of selection of any Bond to be redeemed and ending with the close of business on the Interest Payment Date or a day on which the applicable notice of redemption is given, or (b) to transfer any Bond which has been selected or called for redemption in whole or in part.

CONVERSION TO TAX-EXEMPT RATE

The interest rate payable with respect to this Bond shall convert to the Tax-Exempt Rate, on the Tax-Exempt Conversion Date, upon the happening and the satisfaction of the following conditions precedent to such conversion:

- (i) District Election to Convert. The election in writing provided to the Original Purchaser by the District to convert the interest rate to the Tax-Exempt Rate;
- (ii) Original Purchaser Right to Change Redemption Terms. If the District elects to convert, the Original Purchaser has the right to elect to change the optional redemption terms as of the Tax-Exemption Conversion Date from the original terms identified below. If the Original Purchaser elects in writing to change said redemption terms, it shall identify which of the following two options it has selected:

- (A) OPTION 1: The Bonds are subject to optional redemption, in whole, on any Interest Payment Date, at the price of the principal amount thereof to be redeemed, together with accrued interest to the date fixed for redemption, plus a premium, as set forth in the following table:

Optional Redemption Dates	Prepayment Premium
February 1, 2023 and August 1, 2024	3.0%
February 1, 2025 and August 1, 2026	2.0
February 1, 2027 and August 1, 2028	1.0
February 1, 2029 and thereafter	0.0

- (B) OPTION 2: The Bonds are subject to optional redemption, in whole, on any Interest Payment Date, at the price of the principal amount thereof to be redeemed, together with accrued interest to the date fixed for redemption, as set forth in the following table:

Optional Redemption Dates	Prepayment Premium
August 1, 2028 and thereafter	None.

- (iii) Necessary Document Amendments. The parties covenant to execute and deliver appropriate amendments or supplements to the Paying Agent Agreement, if required, subject to the requirements thereof relating to amendments;
- (iv) Tax Certificate. Delivery of an arbitrage certificate executed by the District with respect to certain tax matters relating to the interest components of the Bonds after interest with respect thereto is converted to the Tax-Exempt Rate;
- (v) IRS Form 8038G. The filing of an IRS Form 8038-G, executed by the District; and
- (vi) Bond Counsel Opinion. Issuance of an opinion of Bond Counsel to the effect that the conditions precedent set forth above to the conversion of interest with respect to the Bonds the Tax-Exempt Rate have been satisfied and that subject to the District's compliance with certain covenants, interest on the Bonds is excludable from gross income of the owners thereof for federal income tax purposes, is not included as an item of tax preference in computing the alternative minimum tax under the Code. Said opinion shall address bank qualification only in the event the District is able to make the necessary designations in the calendar year of such conversion.

In the event of conversion, the Owner agrees to exchange the original Bond for a Bond containing the terms which apply upon conversion including a new Bond Counsel opinion as referenced in (vi) above.

If the foregoing conditions precedent to the conversion to the Tax-Exempt Rate have not occurred on or prior to August 1, 20____, the interest rate with respect to the Bonds shall remain at the Taxable Rate through final maturity or earlier optional redemption.

From and after the Tax-Exempt Conversion Date (if any), if a Determination of Taxability (as defined in the Paying Agent Agreement) has occurred, then during the period said Determination of Taxability is in effect, the interest component of the Lease Payments shall be calculated at the Taxable Rate. The District covenants to provide a revised debt service schedule to the County under such circumstances.

RESTRICTION ON TRANSFERABILITY

(i) Ownership of this Bond may be transferred in whole (not in part), as follows:

- (1) only to a person that is (a) a “qualified institutional buyer” as that term is defined in Rule 144A under the Securities Act of 1933, as amended (the “Securities Act”), or (b) an “accredited investor” as that term is defined in Regulation D under the Securities Act, that is purchasing such Bond for not more than one account and not with a view to distributing such Bond,
- (2) only in a single denomination in the principal amount hereof, and
- (3) only to a purchaser which has signed and filed with the District and the Paying Agent a Purchaser Representation Letter in the form attached to this Bond.

(ii) No Owner of this Bond shall transfer such Bond to any person that such Owner does not reasonably believe is a “qualified institutional buyer” or “accredited investor” as referenced in (1) above that is purchasing such Bonds for not more than one account and not with a view to distributing such Bonds. The transferor of ownership of this Bond agrees to provide notice to any proposed transferee of such Bonds of the restrictions on transfer described herein.

(iii) Each person to whom ownership of this Bond is transferred pursuant hereto shall be deemed by the acceptance of such ownership to have agreed to be bound by the restriction on transferability.

Any Owner effecting a transfer of a Bond shall, and does hereby agree to, indemnify the District and the Paying Agent against any liability that may result if such transfer is not made in accordance with the provisions hereof.

In the case of an Event of Default (as defined in the Paying Agent Agreement), a penalty may apply determined at the interest rate set forth above plus 3.00%, calculated on a 30/360 day basis (the “Default Payment”), applicable only during the period such

payment was not paid and in default and subject to other restrictions identified in the Paying Agent Agreement. Debt service on the Bonds including any Default Payment is payable from solely from *ad valorem* property taxes levied and collected by the County for payment thereof, or any other lawfully available funds made available therefor by the District at its option. The District is not liable for any failure of the County to include a Default Payment in the tax levy relating to the Bonds.

It is certified, recited and declared that all acts and conditions required by the Constitution and laws of the State of California to exist, to be performed or to have been met precedent to and in the issuing of the Bonds in order to make them legal, valid and binding general obligations of the District, have been performed and have been met in regular and due form as required by law; that payment in full for the Bonds has been received; that no statutory or constitutional limitation on indebtedness or taxation has been exceeded in issuing the Bonds; and that due provision has been made for levying and collecting *ad valorem* property taxes on all of the taxable property within the District in an amount sufficient to pay principal and interest when due.

The District and the Paying Agent may treat the Owner hereof as the absolute owner hereof for all purposes, and the County, the District and the Paying Agent shall not be affected by any notice to the contrary.

This Bond shall be not be valid or obligatory for any purpose and shall not be entitled to any security or benefit under the Paying Agent Agreement until the Certificate of Authentication below has been manually signed by the Paying Agent.

IN WITNESS WHEREOF, the Bellevue Union School District has caused this Bond to be executed by the manual or facsimile signature of the President of its Board of Trustees, and attested by the manual or facsimile signature of the Secretary or Clerk of its Board of Trustees, all as of the date stated above.

* * * * *

FORM OF ASSIGNMENT

For value received, the undersigned do(es) hereby sell, assign and transfer unto

(Name, Address and Tax Identification or Social Security Number of Assignee)

the within Bond and do(es) hereby irrevocably constitute and appoint _____, attorney, to transfer the same on the registration books of the Bond Registrar, with full power of substitution in the premises.

Dated: _____

Signature Guaranteed:

Note: Signature(s) must be guaranteed by an eligible guarantor institution.

Note: The signature(s) on this Assignment must correspond with the name(s) as written on the face of the within Bond in every particular without alteration or enlargement or any change whatsoever.

APPENDIX B

FORM OF PURCHASER REPRESENTATION LETTER

[Date]

Bellevue Union School District
3150 Education Drive,
Santa Rosa, California 95407

The Bank of New York Mellon Trust Company N.A.
[ADDRESS]

Re: Bellevue Union School District (Sonoma County)
2022 Refunding General Obligation Bonds

To the Addressees:

The undersigned is a duly authorized officer of _____, a [state/federal bank] organized and existing under the laws of the [State of _____/United States of America] (the "Purchaser") and is purchasing the above-referenced bonds (the "Bonds"). The Purchaser acknowledges that the purpose of the sale of the Bonds is to refinance voter-approved capital facilities and equipment improvements at District facilities and that the Bonds are secured by voter-approved *ad valorem* tax levies and collections, unlimited as to rate or amount.

The undersigned represents, warrants, and covenants in conjunction with its purchase of the Bonds that:

1. Purchaser has such knowledge and experience in financial and business matters that it is capable of evaluating the merits and risks of prospective investments without reliance upon others. In reaching the conclusion that it desires to acquire the Bonds, Purchaser has carefully evaluated all risks associated with this purchase and acknowledges that it is able to bear the economic risk of this purchase.
2. The Purchaser is (a) a "qualified institutional buyer" as that term is defined in Rule 144A under the Securities Act of 1933, as amended (the "Securities Act"), or (b) an "accredited investor" as that term is defined in Regulation D under the Securities Act.
3. Purchaser is purchasing the Bonds for not more than one account and not with a view to distributing such Bonds. Purchaser agrees to the terms and provisions set forth in the Bonds and the Paying Agent Agreement, including specifically to the restrictions on subsequent transfers described in Section 2.06(a) of the Paying Agent Agreement.
4. The Purchaser understands that the Bonds are not, and are not intended to be, registered under the Securities Act and that such registration is not legally required as of the date hereof, and further understands that the Bonds (a) are not being registered or otherwise qualified for sale under the "Blue Sky" laws and regulations of any state, (b) will not be listed in any stock or other securities exchange, (c) will not carry a rating from any rating agency, (d) will not be assigned a CUSIP number, (e) will be registered in the

name of the Purchaser and not in the name of The Depository Trust Company, and (f) will be delivered in a form that may not be readily assignable.

5. The representations in this letter shall not relieve the Issuer from any obligation to disclose any information required by the documents in connection with the issuance of the Bonds or required by applicable law.

Very truly yours,

[ORIGINAL PURCHASER AND
SUBSEQUENT TRANSFEREES, IF
ANY]

By:_____

Name:_____

Title:_____

APPENDIX C

DEBT SERVICE PAYMENT INSTRUCTIONS

Please wire the funds to:

[TO COME - PROVIDED BY FIRST FOUNDATION AS ORIGINAL PURCHASER]

\$ _____
Bellevue Union School District
(Sonoma County, California)
2022 Refunding General Obligation Bonds
(Federally Taxable)

BOND PURCHASE AGREEMENT

_____, 2022

Board of Trustees
Bellevue Union School District
3150 Education Drive,
Santa Rosa, California 95407

Ladies and Gentlemen:

The undersigned, First Foundation Public Finance, a Delaware statutory trust and wholly owned subsidiary of First Foundation Bank (the "Purchaser"), does hereby offer to enter into this Bond Purchase Agreement (this "Purchase Agreement") with the Bellevue Union School District, a school district organized and existing under the laws of the State of California (the "District"), which, upon your acceptance hereof, will be binding upon the District and the Purchaser. This offer is made subject to acceptance by the District prior to 11:59 p.m., California time, on the date hereof.

Section 1. Purchase and Sale of the Bonds. Upon the terms and conditions and upon the basis of the representations, warranties and covenants herein set forth, the District hereby agrees to sell to the Purchaser and the Purchaser hereby agrees to purchase from the District, all (but not less than all) of the \$_____ aggregate principal amount of the District's 2022 Refunding General Obligation Bonds (the "Bonds"), at a purchase price of \$_____ (representing the principal amount of the Bonds).

Section 2. Role of the Purchaser. The District represents, warrants and covenants that: (i) the transaction contemplated herein and in the Paying Agent Agreement is an arm's length commercial transaction between the District and the Purchaser and its affiliates, (ii) in connection with such transaction, the Purchaser and its affiliates are acting solely as a principal and not as an advisor including, without limitation, a "Municipal Advisor" as such term is defined in Section 15B of the Securities and Exchange Act of 1934, as amended, and the related final rules (the "Municipal Advisor Rules"), agent or a fiduciary of the District, (iii) the Purchaser and its affiliates are relying on the bank exemption in the Municipal Advisor Rules, (iv) the Purchaser and its affiliates have not provided any advice or assumed any advisory or fiduciary responsibility in favor of the District with respect to the transaction contemplated hereby or by the Paying Agent Agreement and the discussions, undertakings and procedures leading thereto (whether or not the Purchaser, or any affiliate of the Purchaser, has provided other services or advised, or is currently providing other services or advising the District on other matters), (v) the Purchaser and its

affiliates have financial and other interests that differ from those of the District, and (vi) the District has consulted with its own financial, legal, accounting, tax and other advisors, as applicable, to the extent it deemed appropriate.

Section 3. The Bonds. The Bonds shall (a) be dated the date of their delivery, being May ___, 2022 (the "Closing Date"), (b) mature on the date and accrue interest computed at the rate as set forth in Exhibit A hereto, and (c) be subject to redemption as set forth in Exhibit A hereto, which is incorporated herein by reference. The parties hereto agree that, notwithstanding terms contained in the Resolution (defined below), the Bonds shall not be (i) assigned a rating by any rating agency, (ii) registered with The Depository Trust Company or any other securities depository, (iii) issued pursuant to any type of offering document or official statement, or (iv) assigned CUSIP numbers by Standard & Poor's CUSIP Service Bureau. In addition, the Bonds are "Cinderella Bonds", with an interest rate conversion feature as set forth in Exhibit A hereto.

The Bonds are authorized pursuant to the provisions of the Resolution of the Board of Trustees of the District adopted on April 19, 2022 (the "Resolution") and the provisions of Articles 9 and 11 of Chapter 3 of Part 1 of Division 2 of Title 5 of the State Government Code, commencing with Sections 53550 and 53580 of said Code and other applicable law (collectively, the "Bond Law").

The Bonds shall be executed and delivered under and in accordance with the provisions of the Paying Agent Agreement, dated as of May 1, 2022 (the "Paying Agent Agreement"), by and between the District and The Bank of New York Mellon Trust Company N.A., agent for Sonoma County, as paying agent (the "Paying Agent") and are authenticated by the Paying Agent under the Paying Agent Agreement. All capitalized terms used herein without definition shall have the meanings given to them in the Paying Agent Agreement.

The net proceeds of the Bonds will be deposited into an Escrow Fund established under an Escrow Agreement, dated May ___, 2022 (the "Escrow Agreement"), by and between the District and The Bank of New York Mellon Trust Company, N.A., as escrow agent (the "Escrow Agent") in order to refund on an advance basis certain maturities of outstanding bonds more particularly described in the Escrow Agreement (the "Refunded Bonds").

The Bonds include restrictions on transferability which by entering into this Purchase Agreement the Purchaser hereby agrees and consents to.

Section 4. Provision of District Information. The District has provided certain information to the Purchaser in connection with the Purchaser's consideration of in the purchase of the Bonds.

Section 5. Representations, Warranties and Covenants of the District. The District represents, warrants and covenants to the Purchaser that:

Section 5. Representations, Warranties and Covenants of the District. The District represents, warrants and covenants to the Purchaser that:

(a) Organization. The District is, and will be on the Closing Date, a school district duly organized and validly existing pursuant to the Constitution and laws of the State of California, with the power to issue the Bonds pursuant to the Bond Law, to adopt the Resolution and to enter into this Purchase Agreement.

(b) Enforceability of Documents. (i) At or prior to the Closing Date, the District will have taken all action required by it to authorize the issuance and delivery of the Bonds; (ii) the District has all necessary power and authority to execute and deliver this Purchase Agreement, the Paying Agent Agreement and the Escrow Agreement; to adopt the Resolution; to issue and to deliver the Bonds; to perform its obligations under each such document or instrument (collectively, the "District Documents"); and to carry out and effectuate the transactions contemplated by the District Documents; and (iii) when duly authenticated by the Paying Agent, the Bonds will constitute legally valid and binding obligations of the District, enforceable against the District in accordance with their terms except as the enforcement thereof may be limited by bankruptcy, insolvency, reorganization, moratorium or other laws affecting the enforcement of creditors' rights generally and by the application of equitable principles if equitable remedies are sought.

(c) Authorization. By official action of the District prior to or concurrently with the acceptance hereof, the District has duly authorized and approved the execution and delivery of the District Documents, the performance by the District of the obligations on its part contained therein and the consummation by the District of all other transactions contemplated by the Resolution and this Purchase Agreement.

(d) No Conflicts. The issuance of the Bonds, the adoption of the Resolution, the execution and delivery of the other District Documents, and compliance with the provisions on the District's part contained herein and therein will not conflict with or constitute a breach of or default under any law, administrative regulation, judgment, decree, loan agreement, indenture, bond, note, resolution, agreement or other instrument to which the District is a party or is otherwise subject, nor will any such execution, delivery, adoption or compliance result in the creation or imposition of any lien, charge or other security interest or encumbrance of any nature whatsoever upon any of the properties or assets of the District under the terms of any such law, administrative regulation, judgment, decree, loan agreement, indenture, bond, note, resolution, agreement or other instrument.

(e) Consents. Except as has already been obtained, there is no consent, approval, authorization, other order of, or filing with, or certification by, any regulatory authority having jurisdiction over the District required for the issuance, sale or validity of the Bonds or the consummation by the District of the other transactions contemplated by this Purchase Agreement in connection with the issuance of said Bonds.

(f) Litigation. There is no action, suit, proceeding, inquiry or investigation, at law or in equity, before or by any court, governmental agency, public board or body, pending or, to the best knowledge of the District and except as disclosed in writing to the Purchaser, threatened against the District (i) affecting the existence of the District or the titles of its officers required to approve or sign documents necessary for the delivery of the Bonds, to their respective offices or seeking to prohibit, restrain or enjoin the issuance of the Bonds or the execution and delivery of the Paying Agent Agreement or this Purchase Agreement; (ii) affecting delivery of the Bonds; (iii) in any material way contesting or affecting the validity or enforceability of the Bonds or any other District Document, (iv) contesting the powers of the District or its authority to enter into, adopt or perform its obligations under any of the foregoing, including, but not limited to, the consummation of the transactions contemplated in this Purchase

Agreement; (v) seeking to restrain or enjoin the sale, issuance or delivery of any of the Bonds, the application of the proceeds of the sale of the Bonds, or the collection of the *ad valorem* tax authorized to be levied to pay the principal of and interest on the Bonds, or the application thereof, or (vi) wherein an unfavorable decision, ruling or finding would materially adversely affect the validity or enforceability of the Bonds or any other District Document, or in which a final adverse decision could materially adversely affect the operations of the District, the exclusion of the interest paid on the Bonds from gross income for federal tax purposes and the exemption of such interest from California personal income taxation.

(g) No Violation of Debt Limitation. The District, has not been, is not presently and, as a result of the sale, issuance and delivery of the Bonds, will not be in violation of any debt limitation, appropriation limitation or any other provision of the California Constitution applicable to the Bonds that would materially adversely affect the District's obligations under this Purchase Agreement.

(h) Certificates. Any certificate signed by any officer of the District and delivered to the Purchaser shall be deemed a representation and warranty by the District to the Purchaser as to the statements made therein and the person signing the same shall do so in the person's official capacity and not in the person's individual capacity.

(i) Security for the Bonds. The Bonds are general obligations of the District, and the District has the power to direct the County of Sonoma (the "County") to levy *ad valorem* taxes upon all property within the District subject to taxation without limitation of rate or amount, for the payment of the Bonds and the interest thereon, in accordance with and subject to Sections 15250 and Section 15252 of the Education Code of the State of California.

(j) Compliance with Applicable Tax Laws. The District shall not knowingly take or omit to take any action that, under existing law, may adversely affect the exemption from any applicable State tax of the interest on the Bonds.

(k) No Other Debt. Between the date hereof and the Closing Date, without the prior written consent of the Purchaser, the District will not have issued any other bonds, notes or other obligations for borrowed money, excluding obligations sold to the Purchaser.

(l) Certificates. Except as specifically provided, any certificates signed by any officer of the District and delivered to the Purchaser shall be deemed a representation and warranty by the District to the Purchaser, but not by the person signing the same, as to the statements made therein.

(m) No Financial Advisory or Fiduciary Relationship. The District represents, warrants and covenants that: (i) the transaction contemplated herein and in the Paying Agent Agreement is an arm's length commercial transaction between the District and the Purchaser and its affiliates, (ii) in connection with such transaction, the Purchaser and its affiliates are acting solely as a principal and not as an advisor including, without limitation, a "Municipal Advisor" as such term is defined in Section 15B of the Securities and Exchange Act of 1934, as amended, and the related final rules (the "Municipal Advisor Rules"), agent or a fiduciary of the District, (iii) the

Purchaser and its affiliates are relying on the Bank exemption in the Municipal Advisor Rules, (iv) the Purchaser and its affiliates have not provided any advice or assumed any advisory or fiduciary responsibility in favor of the District with respect to the transaction contemplated hereby or by the Paying Agent Agreement and the discussions, undertakings and procedures leading thereto (whether or not the Purchaser, or any affiliate of the Purchaser, has provided other services or advised, or is currently providing other services or advising the District on other matters), (v) the Purchaser and its affiliates have financial and other interests that differ from those of the District, and (vi) the District has consulted with its own financial, legal, accounting, tax and other advisors, as applicable, to the extent it deemed appropriate.

(n) Levy of Tax. The District hereby agrees to take any and all actions as may be required by San Diego County (the "County") or otherwise necessary in order to arrange for the levy and collection of taxes and payment of the Bonds. In particular, the District hereby agrees to provide to the Treasurer-Tax Collector for the County a copy of the Resolution, a copy of the full debt service schedule for the Bonds, in accordance with Education Code Sections 15250 et seq., Government Code Section 53559 and policies and procedures of the County.

(p) The District's audited financial statements as of and for the fiscal year ended June 30, 2021 are a fair presentation of the financial position of the District as of the date thereof and the results of its operations and changes in its fund balances for the period specified.

(q) The District is not listed on the Specially Designated Nationals and Blocked Person List or other similar lists maintained by the U.S. Department of the Treasury's Office of Foreign Assets Control, and any successor thereto, the Secretary of the Treasury, or included in any Executive Orders, that prohibits or limits the Purchaser from making any advance or extension of credit to the District or from otherwise conducting business with the District.

(r) The District shall cause its books and accounts to be audited annually by an independent accountant. For so long as the Purchaser is the owner of the Bonds, the District will file a copy of said annual audit report with the Purchaser within 270 days following June 30 of each year (by March 30). In addition, information for the most recently completed fiscal year for (i) the District's total assessed valuation, (ii) top twenty secured property taxpayers and (iii) secured tax charges and delinquencies but only if the District is not participating in the County "Teeter Plan", shall also be provided by said date, but only if such information is not otherwise available on the Municipal Securities Rulemaking Board's platform known as the Electronic Municipal Market Access with respect to other outstanding debt of the District.

Section 6. Representations, Warranties and Covenants of the Purchaser. The Purchaser represents to and agrees with the District that, as of the date hereof and as of the Closing Date:

(a) The Purchaser is a Delaware a statutory trust and a wholly owned subsidiary of First Foundation Bank, a banking corporation, and has such knowledge and experience in financial and business matters as to be capable of evaluating the merits and risks of a purchase of the Bonds.

(b) No official statement or other offering document has been prepared with respect to the Bonds, and the Purchaser has conducted its own investigation into the merits and risks of the Bonds and has received, or been afforded access to, from the District or otherwise, all the information which it as a reasonable purchasers has requested of the District as a result of the Purchaser attaching significance thereto in making its decision with regard to the Bonds.

(c) Any certificate signed by any officer of the Purchaser and delivered to the District shall be deemed a representation and warranty by the Purchaser to the District as to the statements made therein and the person signing the same shall do so in the person's official capacity and not in the person's individual capacity.

The Purchaser agrees to execute and deliver the Purchaser Representation Letter dated as of the Closing Date in the form attached hereto as Exhibit C.

In addition, the Purchaser hereby agrees and covenants, upon the direction of the District on or after the Tax-Exempt Conversion Date, to select a redemption feature as set forth in the Paying Agent Agreement that will enable the District to successfully convert the interest rate on the Bonds to the Tax-Exempt Rate. The Purchaser agrees to execute and deliver any other certificates or documentation Bond Counsel deems necessary for said conversion.

Section 7. Conditions to Closing. The Purchaser has entered into this Purchase Agreement in reliance upon the representations and warranties of the District contained herein and the performance by the District of its obligations hereunder, both as of the date hereof and as of the Closing Date. The Purchaser's obligations under this Purchase Agreement are and shall be subject to the following further conditions as of the Closing Date:

(a) From the time of the execution and delivery of this Purchase Agreement to the Closing Date, there shall not have been any (i) material adverse change in the financial condition or general affairs of the District; (ii) event, court decision, proposed law or rule that may have the effect of changing the federal income tax incidents of the Bonds or the contemplated transactions; or (iii) international or national crisis, suspension of stock exchange trading or banking moratorium materially affecting, in the Purchaser's opinion, the value of the Bonds to the Purchaser.

(b) The Purchaser hereby enters into this Agreement in reliance upon its own due diligence and the representations and warranties of the District contained herein and the representations and warranties to be contained in the documents and instruments to be delivered on the Closing Date and upon the performance by the District and the Paying Agent of their respective obligations both on and as of the date hereof and as of the Closing Date. Accordingly, the obligations of the Purchaser under this Purchase Agreement to purchase, to accept delivery of and to pay for the Bonds shall be subject, at the option of the Purchaser, to the accuracy in all material respects of the representations and warranties of the District contained herein as of the date hereof and as of the Closing Date, to the accuracy in all material respects of the statements of the officers and other officials of the District and the Paying Agent made in any certificate or document furnished pursuant to the provisions hereof, to the performance by the District and the Paying Agent of their respective obligations to be performed hereunder and under the District Documents, at or prior to the Closing Date, and also shall be subject to the following additional conditions:

(i) At the Closing Date, the District Documents shall have been duly authorized, executed and delivered by the respective parties thereto, all in substantially the forms heretofore submitted to the Purchaser, with only such changes as shall have been agreed to in writing by the Purchaser, and shall be in full force and effect, and the Resolution shall be in full force and effect;

(ii) On the Closing Date, all necessary action of the District relating to the execution and delivery of the Bonds will have been taken and will be in full force and effect and will not have been amended, modified or supplemented; and

(iii) At or prior to the Closing Date, the Purchaser shall have received the following documents, in each case satisfactory in form and substance to the Purchaser:

(A) Bond Opinion. The unqualified approving opinion of Jones Hall, A Professional Law Corporation, as bond counsel ("Bond Counsel"), dated the Closing Date, addressed to the District, as to the validity of the Bonds substantially in the form set forth in Exhibit B to this Purchase Agreement;

(B) Reliance Letter. A reliance letter from Bond Counsel permitting the Purchaser to rely upon the approving opinion referred to in subparagraph 7(b)(iii)(A), above;

(C) Supplemental Opinion. A supplemental opinion of Bond Counsel, dated the Closing Date and addressed to the Purchaser, which may take the form of one or more opinions, to the effect that:

(1) the Bonds are exempt from registration under the Securities Act of 1933, as amended, and the Resolution is exempt from qualification pursuant to the Trust Indenture Act of 1939, as amended;

(2) assuming due authorization, execution and delivery by the other parties thereto, this Purchase Contract and the Paying Agent Agreement have been duly approved, authorized, executed and delivered by the District and constitute the legal, valid and binding agreements of the District, except as the enforcement thereof may be limited by bankruptcy, insolvency, reorganization, arrangement, moratorium and other laws affecting the enforcement of creditors' rights generally and by the application of equitable principles (regardless of whether such enforceability is considered in equity or at law), to the exercise of judicial discretion in appropriate cases, and to the limitations on legal remedies against school districts in the State of California and except that no opinion is expressed with respect to any indemnification or contribution provisions contained in this Purchase Contract;

(3) no authorization, approval, consent or other order of the State or any local agency of the State, other than such authorizations, approvals and consents which have been obtained, is required for the valid authorization, execution and delivery by the District of this Purchase Contract or the Paying Agent Agreement or the consummation by the District of the other transactions contemplated by such agreement (provided no opinion need be expressed as to any action required under the state securities or blue sky laws in connection with the purchase of the Bonds by the Purchaser); and

(4) that the Refunded Bonds have been defeased within the meaning of the documentation authorizing the issuance thereof.

(D) Certificate of the District. A certificate signed by a duly authorized official of the District to the effect that (A) this Purchase Agreement, the Bonds and the Paying Agent Agreement have been duly executed and delivered, (B) the representations, warranties and covenants of the District herein are true and correct in all material respects as of the Closing Date, (C) the District has complied with all the terms of the District Documents to be complied with by the District prior to or concurrently with the Closing Date and such documents are in full force and effect, and (D) (i) as of the Closing Date there is no legal or governmental proceeding or litigation which has been filed against the District wherein an unfavorable decision, ruling or finding might adversely affect the transactions contemplated in or the validity of the Bonds; and (ii) the adoption, execution and delivery of the Bonds, and the compliance by the District with the provisions of the Bonds, this Purchase Agreement, the Paying Agent Agreement and the Escrow Agreement would not conflict with or constitute a breach of or default under any court decree or order or any agreement, indenture, lease or other instrument or any existing law or administrative regulation, decree or order to which the District is subject or by which the District is or may be bound;

(E) Resolution. A certificate of an officer of the District, together with a fully executed copy of the Resolution, to the effect that such copy is a true and correct copy of the Resolution and that the Resolution is duly adopted and has not been modified, amended, rescinded or revoked except as provided herein, and is in full force and effect on the Closing Date;

(F) Paying Agent Agreement. An executed copy of the Paying Agent Agreement;

(G) Escrow Agreement. An executed copy of the Escrow Agreement;

(H) Purchase Agreement. An executed copy of this Purchase Agreement;

(I) Paying Agent Certificate. A certificate of the Paying Agent relating to the execution of the Paying Agent Agreement;

(J) Escrow Agent Certificate. A certificate of the Escrow Agent relating to the execution of the Escrow Agreement;

(K) Escrow Verification. A verification of Causey, Demgen & Moore verifying the sufficiency of funds deposited in the Escrow Fund for the defeasance of the Refunded Bonds.

(L) Additional Documents. Such additional legal opinions, certificates, proceedings, instruments and other documents as Bond Counsel or the Purchaser may reasonably request to evidence (i) compliance by the District and the Paying Agent with legal requirements, (ii) the truth and accuracy, as of the Closing Date, of the representations of the District herein contained, and (iii) the due performance or satisfaction by the District at or prior to the Closing Date of all agreements then to be performed and all conditions then to be satisfied by the District.

Section 8. Additional Closing Conditions for the District. The District has entered into this Purchase Agreement in reliance upon the representations and warranties of the Purchaser contained herein and the performance by the Purchaser of its obligations hereunder, both as of the date hereof and as of the Closing Date. The obligations of the District hereunder are and shall be subject to the receipt of the Purchaser, in form satisfactory to the District and signed by an authorized officer of the Purchaser, confirming delivery of the Bonds to the Purchaser and the satisfaction of all conditions and terms of this Purchase Agreement by the District and confirming to the District that as of the Closing Date all of the representations of the Purchaser contained in this Purchase Agreement are true and correct in all material respects.

Section 9. Termination. All of the opinions, letters, certificates, instruments and other documents mentioned above or elsewhere in this Agreement shall be deemed to be in compliance with the provisions hereof if, but only if they are in form and substance satisfactory to the Purchaser. Receipt of, and payment for, the Bonds shall constitute evidence of the satisfactory nature of such as to the Purchaser. The performance of any and all obligations of the District hereunder and the performance of any and all conditions contained herein for the benefit of the Purchaser may be waived by the Purchaser in the Purchaser's sole discretion.

If the District shall be unable to satisfy the conditions to the obligations of the Purchaser to purchase, accept delivery of and pay for the Bonds contained in this Agreement, or if the obligations of the Purchaser to purchase, accept delivery of and pay for the Bonds shall be terminated for any reason permitted by this Agreement, this Agreement shall terminate, and neither of the Purchaser nor the District shall be under further obligation hereunder; provided, however, that the respective obligations of the District and the Purchaser set forth in Section 10 hereof shall continue in full force and effect.

Section 10. Expenses. The fees and disbursements of Bond Counsel, the fees and disbursements of Isom Advisors, A Division of Urban Futures, Inc., as municipal advisor to the

District, the cost of preparing the Bonds, fees of the Raymond James & Associates, as placement agent, fees of the California Debt and Investment Advisory Commission, the fees of the Paying Agent and Escrow Agent, fees of counsel to the Purchaser, verification fees and other miscellaneous expenses of the District incurred in connection with the offering and delivery of the Bonds shall all be the obligation of the District. The Purchaser shall have no responsibility for any expenses associated with the issuance of the Bonds, including, but not limited to, the expenses identified above as the obligation of the District.

Section 11. Applicable Law. This Purchase Agreement shall be governed by the laws of the State of California, exclusive of the choice of law provisions thereof.

Section 12. Waiver of Jury Trial. (a) TO THE MAXIMUM EXTENT PERMITTED BY LAW, EACH OF THE DISTRICT AND THE PURCHASER IRREVOCABLY WAIVES ANY AND ALL RIGHT TO TRIAL BY JURY IN ANY LEGAL PROCEEDINGS ARISING OUT OF OR RELATING TO THIS PURCHASE CONTRACT OR THE TRANSACTIONS CONTEMPLATED HEREBY. THE DISTRICT FURTHER AGREES THAT, IN THE EVENT OF LITIGATION, IT WILL NOT PERSONALLY OR THROUGH ITS AGENTS OR ATTORNEYS SEEK TO REPUDIATE THE VALIDITY OF THIS SECTION 12, AND IT ACKNOWLEDGES THAT IT FREELY AND VOLUNTARILY ENTERED INTO THIS AGREEMENT TO WAIVE TRIAL BY JURY IN ORDER TO INDUCE THE PURCHASER TO ENTER INTO THIS PURCHASE CONTRACT.

(b) To the extent the foregoing waiver of a jury trial is unenforceable under applicable California law, the parties agree to refer, for a complete and final adjudication, any and all issues of fact or law involved in any litigation or proceeding (including all discovery and law and motion matters, pretrial motions, trial matter and post-trial motions up to and including final judgment), brought to resolve any dispute (whether based on contract, tort or otherwise) between the parties hereto arising out of, in connection with or otherwise related or incidental to this Purchase Contract to a judicial referee who shall be appointed under a general reference pursuant to California Code of Civil Procedure Section 638, which referee's decision will stand as the decision of the court. Such judgment will be entered on the referee's statement of judgment in the same manner as if the action had been tried by the court. The parties shall select a single neutral referee, who shall be a retired state or federal judge with at least five years of judicial experience in civil matters; provided that the event the parties cannot agree upon a referee, the referee will be appointed by the court. The referee's fees shall be borne by the party who does not prevail, as determined by the referee.

Section 13. Parties in Interest; Survival of Representations and Warranties. This Purchase Agreement is made solely for the benefit of the District and the Purchaser (including the successors or assigns thereof) and no other person shall acquire or have any right hereunder or by virtue hereof. All representations, warranties and agreements of the District in this Purchase Agreement shall remain operative and in full force and effect regardless of any investigation made by or on behalf of the Purchaser and shall survive the delivery of and payment for the Bonds.

Section 14. Electronic Signatures. This Purchase Agreement and the documents and closing certificates identified in Section 7(b) may be executed and delivered by facsimile signature or other electronic or digital means (including, without limitation, Adobe's Portable Document Format ("PDF")). Any such signature shall be of the same force and effect as an original signature, it being the express intent of the parties to create a valid and legally enforceable contract between them. The exchange and delivery of said documents and certificates and the related signature pages via facsimile or as an attachment to electronic mail (including in PDF) shall constitute effective execution and delivery by the parties and may be used by the parties for all purposes. Notwithstanding the foregoing, at the request of either party, the parties hereto agree to exchange inked original replacement signature pages as soon thereafter as reasonably practicable.

This Purchase Agreement may be executed by the parties hereto in separate counterparts, each of which when so executed and delivered shall be an original, but all such counterparts shall together constitute but one and the same instrument.

FIRST FOUNDATION PUBLIC FINANCE, a
Delaware statutory trust and wholly owned
subsidiary of First Foundation Bank,
as Purchaser

By: _____
Authorized Representative

The foregoing is hereby accepted and
agreed to as of the date first above written:

BELLEVUE UNION SCHOOL DISTRICT

By: _____
Chief Business Official

Dated: _____, 2022

[Signature Page of Purchase Agreement]

EXHIBIT A

\$ _____
**BELLEVUE UNION SCHOOL DISTRICT
(SONOMA COUNTY, CALIFORNIA)
2022 REFUNDING GENERAL OBLIGATION BONDS
(FEDERALLY TAXABLE)**

- a. Purchase Price: \$ _____
- b. Principal Amount: \$ _____
- c. Denominations: A single denomination in the original amount of \$ _____
- d. Form: The Bond shall be delivered as a single current interest term bond in fully registered form, without coupons, dated as of the date of issuance thereof, and shall be registered in the name of the owner thereof, initially, First Foundation Public Finance, a Delaware statutory trust and wholly owned subsidiary of First Foundation Bank (and its successors and assigns), all as provided in the Resolution and the Paying Agent Agreement. The Bonds shall be available, if so requested by the Purchaser, at such place as the Purchaser and the District agree upon, for examination by the Purchaser at least 24 hours prior to the Closing Date and on the Closing Date shall be delivered to the Purchaser.
- e. Interest Rate; Payable: Initial Taxable Rate: 3.70% per annum. Interest Rate if Converted to Tax-Exempt Rate: 2.70% per annum (as of the date of conversion). Payments of interest shall be payable on February 1 and August 1 of each year, commencing August 1, 2022 (each, a "Payment Date"). *Conditions for interest rate conversion and related documentation set forth in the Paying Agent Agreement.*
- f. Maturity Schedule: The Bonds shall be issued as a single Term Bond which matures on August 1, 2044 and bears interest as forth in (e), with mandatory sinking fund redemption as set forth in (h) below.
- g. Optional Redemption: The Bonds are subject to optional redemption, in whole, on any Interest Payment Date, at the price of the principal amount thereof to be redeemed, together with accrued interest to the date fixed for redemption, plus a premium, as set forth in the following table:

Optional Redemption Dates	Prepayment Premium
February 1, 2023 and August 1, 2024	3.0%
February 1, 2025 and August 1, 2026	2.0
February 1, 2027 and August 1, 2028	1.0
February 1, 2029 and thereafter	0.0

h. **Mandatory Sinking Fund Redemption:** The Bonds are subject to mandatory sinking fund redemption on the dates and in the amounts, as set forth below, at a redemption price equal to 100% of the principal amount thereof to be redeemed (without premium), together with interest accrued thereon to the date fixed for redemption.

Sinking Fund Redemption Date	Sinking Fund Redemption Amount	Sinking Fund Redemption Date	Sinking Fund Redemption Amount
8/1/23		8/1/34	
8/1/24		8/1/35	
8/1/25		8/1/36	
8/1/26		8/1/37	
8/1/27		8/1/38	
8/1/28		8/1/39	
8/1/29		8/1/40	
8/1/30		8/1/41	
8/1/31		8/1/42	
8/1/32		8/1/43	
8/1/33		8/1/44 (Maturity)	

i. **Closing Date:** May __, 2022 or such other date mutually agreed to by the District and the Purchaser.

j. **Delivery:** Payment by Purchaser shall be made by wire transfer to the Paying Agent of the Purchase Price on the Closing Date, or as otherwise directed by the District. Delivery of the Bonds shall be made to the Purchaser on the Closing Date and delivery of the other documents shall be made at the offices of Jones Hall, A Professional Law Corporation, 475 Sansome Street, 17th Floor, San Francisco, California 94111, or such other place as shall have been mutually agreed upon by the District and the Purchaser.

EXHIBIT B
FORM OF OPINION OF BOND COUNSEL

[LETTERHEAD OF JONES HALL]

May ___, 2022

Board of Trustees
Bellevue Union School District
3150 Education Drive,
Santa Rosa, California 95407

OPINION: \$_____ Bellevue Union School District (Sonoma County, California)
2022 Refunding General Obligation Bonds (Federally Taxable)

Members of the Board of Trustees:

We have acted as bond counsel to the Bellevue Union School District (the "District") in connection with the issuance by the District of its Bellevue Union School District (Sonoma County, California) 2022 Refunding General Obligation Bonds in the aggregate principal amount of \$_____ (the "Bonds"), under the provisions of Articles 9 and 11 of Chapter 3 of Part 1 of Division 2 of Title 5 of the California Government Code (the "Bond Law"), a resolution of the Board of Trustees of the District (the "Board") adopted on April 19, 2022 (the "Resolution") and a Paying Agent Agreement, dated as of May 1, 2021, between the District and The Bank of New York Mellon Trust Company N.A., agent for the County of Sonoma, as paying agent for the Bonds (the "Paying Agent Agreement"). We have examined the law and such certified proceedings and other papers as we have deemed necessary to render this opinion.

As to questions of fact material to our opinion, we have relied upon representations of the Board contained in the Resolution and in the certified proceedings and other certifications and opinions furnished to us, without undertaking to verify such facts by independent investigation.

Based upon the foregoing, we are of the opinion, under existing law, as follows:

1. The District is a duly created and validly existing school district with the power to issue the Bonds under the Bond Law and to perform its obligations under the Resolution and the Bonds.

2. The Resolution has been duly adopted by the Board and constitutes a valid and binding obligation of the District enforceable against the District in accordance with its terms.

3. The Bonds have been duly issued by the District, and are valid and binding general obligations of the District.

4. The Board of Supervisors of Sonoma County is obligated under the laws of the State of California to cause to be levied a tax without limit as to rate or amount upon the property in the District subject to taxation by the District for the payment when due of the principal of and interest on the Bonds.

5. The interest on the Bonds is exempt from personal income taxation imposed by the State of California.

We express no opinion regarding any other tax consequences arising with respect to the ownership, sale or disposition of, or the amount, accrual or receipt of interest on, the Bonds.

The rights of the owners of the Bonds and the enforceability of the Bonds are limited by bankruptcy, insolvency, reorganization, moratorium and other similar laws affecting creditors' rights generally, and by equitable principles, whether considered at law or in equity.

This opinion is given as of the date hereof, and we assume no obligation to revise or supplement this opinion to reflect any facts or circumstances that may hereafter come to our attention, or any changes in law that may hereafter occur.

Respectfully submitted,

A Professional Law Corporation

EXHIBIT C

FORM OF PURCHASER REPRESENTATION LETTER

Board of Trustees
Bellevue Union School District
3150 Education Drive,
Santa Rosa, California 95407

DATE: _____

OPINION: \$_____ Bellevue Union School District (Sonoma County, California)
2022 Refunding General Obligation Bonds (Federally Taxable)

To the Addressee:

The undersigned is a duly authorized officer of First Foundation Public Finance, a Delaware statutory trust and wholly owned subsidiary of First Foundation Bank (the "Purchaser") and is purchasing the above-referenced bonds (the "Bonds") from the Bellevue Union School District (the "District").

The Purchaser acknowledges that the proceeds from the sale of the Bonds will be used to refinance voter-approved capital facilities and equipment improvements at District facilities and that the Bonds are secured by voter-approved *ad valorem* tax levies and collections, unlimited as to rate or amount.

The undersigned represents, warrants, and covenants in conjunction with its purchase of the Bonds that:

1. Purchaser has such knowledge and experience in financial and business matters that it is capable of evaluating the merits and risks of prospective investments without reliance upon others. In reaching the conclusion that it desires to acquire the Bonds, Purchaser has carefully evaluated all risks associated with this purchase and acknowledges that it is able to bear the economic risk of this purchase.

2. The Purchaser is (a) a "qualified institutional buyer" as that term is defined in Rule 144A under the Securities Act of 1933, as amended (the "Securities Act"), or (b) an "accredited investor" as that term is defined in Regulation D under the Securities Act.

3. Purchaser is purchasing the Bonds for not more than one account and not with a view to distributing such Bonds. Purchaser agrees to the terms and provisions set forth in the Bonds, including specifically to the restrictions on subsequent transfers described therein.

4. The Purchaser understands that the Bonds are not, and are not intended to be, registered under the Securities Act and that such registration is not legally required as of the date hereof, and further understands that the Bonds (a) are not being registered or otherwise qualified for sale under the "Blue Sky" laws and regulations of any state, (b) will not be listed in any stock

or other securities exchange, (c) will not carry a rating from any rating agency, (d) will not be assigned a CUSIP number, (e) will be registered in the name of the Purchaser and not in the name of The Depository Trust Company, and (f) will be delivered in a form that may not be readily assignable.

5. The representations in this letter shall not relieve the District from any obligation to disclose any information required by the documents in connection with the issuance of the Bonds or required by applicable law.

Very truly yours,

**FIRST FOUNDATION PUBLIC FINANCE, a
Delaware statutory trust and wholly
owned subsidiary of First Foundation
Bank**

By: _____
Authorized Officer

ESCROW AGREEMENT

**Relating to the advance refunding of
certain maturities of**

**\$4,200,000
original principal amount of
Bellevue Union School District
(Sonoma County, California)
General Obligation Bonds
Election of 2014, Series A
(Bank Qualified)**

This ESCROW AGREEMENT (this "Agreement"), dated as of May 1, 2022, is between the BELLEVUE UNION SCHOOL DISTRICT, a school district organized and existing under the Constitution and laws of the State of California (the "District"), and THE BANK OF NEW YORK MELLON TRUST COMPANY, N.A., a national banking association organized and existing under the laws of the United States of America, acting as escrow agent and paying agent for the Prior Bonds described below (the "Escrow Agent" and the "Prior Paying Agent").

B A C K G R O U N D :

1. The District has caused the issuance of the above-captioned bonds (the "2014A Bonds" and also the "Prior Bonds").
2. The Prior Bonds were issued pursuant to a resolution adopted by the District's Board of Trustees on October 21, 2014 (the "Prior Bond Resolution") and a Paying Agent Agreement, dated as of November 1, 2014 (the "Prior Paying Agent Agreement").
3. In order to provide for the advance refinancing of a portion of the Prior Bonds and achieve savings in interest costs, the Board of Trustees of the District has caused the issuance of its "Bellevue Union School District (Sonoma County, California) 2022 Refunding General Obligation Bonds" in the aggregate principal amount of \$_____ (the "2022 Bonds"), under a resolution adopted by the Board of Trustees of the District on April 19, 2022 (the "Bond Resolution") and a Paying Agent Agreement, dated as of May 1, 2022, by and between the District and the Escrow Agent, serving as paying agent.
4. The District wishes to appoint the Escrow Agent in order to establish an irrevocable escrow fund to be funded with the proceeds of the 2022 Bonds for the purpose of providing for the payment and redemption of the refunded portions of the Prior Bonds as more particularly identified on Exhibit A hereto (the "Refunded Bonds") through and including their respective redemption dates.

A G R E E M E N T :

In consideration of the premises and the material covenants contained herein, the District, the Prior Paying Agent and the Escrow Agent hereby agree as follows:

SECTION 1. *Definition of Federal Securities.* As used herein, the term "Federal Securities" means any non-callable direct obligations of the United States of America or other non-callable obligations the payment of the principal of and interest on which is guaranteed by a pledge of the full faith and credit of the United States of America.

SECTION 2. *Appointment of Escrow Agent; Establishment of Escrow Fund.* The District hereby appoints the Escrow Agent to act as escrow agent for purposes of administering the funds required to pay and redeem the Refunded Bonds as provided herein.

The Escrow Agent is hereby directed to establish an escrow fund (the "Escrow Fund") to be held by the Escrow Agent as an irrevocable escrow securing the payment and redemption of the Refunded Bonds in accordance with the provisions of the Prior Bond Resolution. If at any time the Escrow Agent receives actual knowledge that the cash and investments in the Escrow Fund will not be sufficient to make any payment required by Section 3 in respect of the Refunded Bonds, the Escrow Agent shall notify the District of such fact and the District shall immediately cure such deficiency from any source of legally available funds. The Escrow Agent has no liability for any such insufficiency.

SECTION 3. *Deposit of Amounts in Escrow Fund.* On _____, 2022 (the "Closing Date"), the District shall cause to be transferred to the Escrow Agent for deposit into the Escrow Fund the amount of \$_____ in immediately available funds, to be derived from the proceeds of the 2022 Bonds.

SECTION 4. *Investment of Amounts in Escrow Fund.* On the Closing Date, the Escrow Agent shall invest \$_____ of the funds deposited with it pursuant to Section 3 in the Escrow Fund in the Federal Securities identified in Exhibit B hereto, and hold the remaining \$_____ in cash, uninvested which shall be sufficient to make the payments required by Section 5 hereof as certified by Causey Demgen & Moore P.C., Denver, Colorado, as verification agent. The Escrow Agent shall have no lien upon or right of set off against the cash at any time on deposit in the Escrow Fund.

If the Escrow Agent learns that the Department of the Treasury or the Bureau of the Fiscal Service will not, for any reason, accept a subscription of state and local government series securities ("SLGS") that is to be submitted pursuant to this Agreement, the Escrow Agent shall promptly request alternative written investment instructions from the District with respect to funds which were to be invested in SLGS. The Escrow Agent shall follow such instructions and, upon the maturity of any such alternative investment, the Escrow Agent shall hold such funds uninvested and without liability for interest until receipt of further written instructions from the District. In the absence of investment instructions from the District, the Escrow Agent shall hold such funds uninvested. The Escrow Agent may conclusively rely upon the District's selection of an alternative investment as a determination of the alternative investment's legality and suitability and shall not be liable for any losses, fees, taxes or other charges

related to the alternative investments or for compliance with any yield restriction applicable thereto.

SECTION 5. *Application of Funds.* All Federal Securities and cash on deposit in the Escrow Fund shall be and are hereby irrevocably pledged as a special fund for the payment of the principal of and interest on the Refunded Bonds at the times and in the amounts set forth in the schedule set forth on Exhibit C. The Escrow Agent shall transfer such amounts to the Prior Paying Agent as indicated in such schedule.

Following payment in full of the principal of and interest on the Refunded Bonds and any amounts then owed to the Escrow Agent, all amounts on deposit in the Escrow Fund shall be transferred by the Escrow Agent upon the written direction of the District to the Sonoma County Treasurer-Tax Collector to be deposited in the Debt Service Fund established pursuant to the Bond Resolution and applied to pay interest next coming due and payable on the 2022 Bonds.

SECTION 6. *Defeasance Notice; Notice of Redemption.* The District hereby instructs the Prior Paying Agent to provide a Notice of Defeasance of the Refunded Bonds with the Municipal Securities Rulemaking Board Electronic Municipal Market Access ("EMMA") and to holders of the Refunded Bonds within ten business days of the Closing Date. The sole remedy for the Prior Paying Agent's failure to file such notice with EMMA shall be an action in mandamus by the holders of the Refunded Bonds for specific performance or similar remedy to compel performance. The form of such Defeasance Notice is set forth as Exhibit D hereto. In addition, the Prior Paying Agent shall provide notice of redemption to the Refunded Bond Owners in accordance with Prior Bond Resolution, not less than thirty or more than sixty days prior to the redemption date.

SECTION 7. *Compensation to Escrow Agent.* The District shall pay the Escrow Agent full compensation for its services under this Agreement, including out-of-pocket costs such as publication costs, legal fees and other costs and expenses relating hereto and, in addition, all fees, costs and expenses relating to the purchase, substitution or withdrawal of any securities after the date hereof. Under no circumstances shall amounts deposited in or credited to the Escrow Fund be deemed to be available for said purposes. The Escrow Agent has no lien upon or right of set off against the cash at any time on deposit in the Escrow Fund.

SECTION 8. *Immunities and Liability of Escrow Agent.* The Escrow Agent undertakes to perform only such duties as are expressly set forth in this Agreement and no implied duties, covenants or obligations shall be read into this Agreement against the Escrow Agent. The Escrow Agent shall not have any liability hereunder except to the extent of its gross negligence or willful misconduct. In no event shall the Escrow Agent be liable for any special, indirect or consequential damages. The Escrow Agent shall not be liable for any loss from any investment made by it in accordance with the terms of this Agreement. The Escrow Agent shall not be liable for the recitals or representations contained in this Agreement and shall not be responsible for the validity of this Agreement, the sufficiency of the Escrow Fund or the moneys and securities to pay the principal and interest with respect to the Refunded Bonds.

Whenever in the administration of this Agreement the Escrow Agent deems it necessary or desirable that a matter be proved or established prior to taking or not

taking any action, such matter may be deemed to be conclusively proved and established by a certificate of an authorized representative of the District and shall be full protection for any action taken or not taken by the Escrow Agent in good faith reliance thereon.

The Escrow Agent may conclusively rely as to the truth and accuracy of the statements and correctness of any opinions or calculations provided to it in connection with this Agreement and shall be protected in acting, or refraining from acting, upon any notice, instruction, request, certificate, document, opinion or other writing furnished to the Escrow Agent in connection with this Agreement and believed by the Escrow Agent to be signed by the proper party, and it need not investigate any fact or matter stated therein. The Escrow Agent may consult with counsel and the advice or any opinion of counsel shall be full and complete authorization and protection in respect of any action taken or omitted by it hereunder in good faith and in accordance with such advice or opinion of counsel.

None of the provisions of this Agreement shall require the Escrow Agent to expend or risk its own funds or otherwise to incur any liability, financial or otherwise, in the performance of any of its duties hereunder. The Escrow Agent may execute any of the trusts or powers hereunder or perform any duties hereunder either directly or by or through agents, attorneys, custodians or nominees appointed with due care, and shall not be responsible for any willful misconduct or negligence on the part of any agent, attorney, custodian or nominee so appointed. The Escrow Agent shall not be liable to the parties hereto or deemed in breach or default hereunder if and to the extent its performance hereunder is prevented by reason of force majeure. The term "force majeure" means an occurrence that is beyond the control of the Escrow Agent and could not have been avoided by exercising due care. Force majeure shall include acts of God, terrorism, war, riots, strikes, fire, floods, earthquakes, epidemics or other similar occurrences.

The Escrow Agent may at any time resign by giving 30 days written notice of resignation to the District. Upon receiving such notice of resignation, the District shall promptly appoint a successor and, upon the acceptance by the successor of such appointment, release the resigning Escrow Agent from its obligations hereunder by written instrument, a copy of which instrument shall be delivered to each of the District, the resigning Escrow Agent and the successor. If no successor shall have been so appointed and have accepted appointment within 30 days after the giving of such notice of resignation, the resigning Escrow Agent may petition any court of competent jurisdiction for the appointment of a successor.

Any bank, corporation or association into which the Escrow Agent may be merged or converted or with which it may be consolidated, or any bank, corporation or association resulting from any merger, conversion or consolidation to which the Escrow Agent shall be a party, or any bank, corporation or association succeeding to all or substantially all of the corporate trust business of the Escrow Agent shall be the successor of the Escrow Agent hereunder without the execution or filing of any paper with any party hereto or any further act on the part of any of the parties hereto except on the part of any of the parties hereto where an instrument of transfer or assignment is required by law to effect such succession, anything herein to the contrary notwithstanding.

The Escrow Agent shall have the right to accept and act upon instructions, including funds transfer instructions ("Instructions") given pursuant to this Agreement and delivered using Electronic Means ("Electronic Means" shall mean the following communications methods: e-mail, facsimile transmission, secure electronic transmission containing applicable authorization codes, passwords and/or authentication keys issued by the Escrow Agent, or another method or system specified by the Escrow Agent as available for use in connection with its services hereunder); provided, however, that the District shall provide to the Escrow Agent an incumbency certificate listing officers with the authority to provide such Instructions ("Authorized Officers") and containing specimen signatures of such Authorized Officers, which incumbency certificate shall be amended by the District whenever a person is to be added or deleted from the listing. If the District elects to give the Escrow Agent Instructions using Electronic Means and the Escrow Agent in its discretion elects to act upon such Instructions, the Escrow Agent's understanding of such Instructions shall be deemed controlling. The District understands and agrees that the Escrow Agent cannot determine the identity of the actual sender of such Instructions and that the Escrow Agent shall conclusively presume that directions that purport to have been sent by an Authorized Officer listed on the incumbency certificate provided to the Escrow Agent have been sent by such Authorized Officer. The District shall be responsible for ensuring that only Authorized Officers transmit such Instructions to the Escrow Agent and that the District and all Authorized Officers are solely responsible to safeguard the use and confidentiality of applicable user and authorization codes, passwords and/or authentication keys upon receipt by the District. The Escrow Agent shall not be liable for any losses, costs or expenses arising directly or indirectly from the Escrow Agent's reliance upon and compliance with such Instructions notwithstanding such directions conflict or are inconsistent with a subsequent written instruction. The District agrees: (i) to assume all risks arising out of the use of Electronic Means to submit Instructions to the Escrow Agent, including without limitation the risk of the Escrow Agent acting on unauthorized Instructions, and the risk of interception and misuse by third parties; (ii) that it is fully informed of the protections and risks associated with the various methods of transmitting Instructions to the Escrow Agent and that there may be more secure methods of transmitting Instructions than the method(s) selected by the District; (iii) that the security procedures (if any) to be followed in connection with its transmission of Instructions provide to it a commercially reasonable degree of protection in light of its particular needs and circumstances; and (iv) to notify the Escrow Agent immediately upon learning of any compromise or unauthorized use of the security procedures.

The District acknowledges that to the extent regulations of the Comptroller of the Currency or other applicable regulatory entity grant the District the right to receive brokerage confirmations of security transactions as they occur, the District specifically waives receipt of such confirmations to the extent permitted by law. The Escrow Bank will furnish the District periodic transaction statements which include detail for all investment transactions made by the Escrow Bank hereunder; provided that the Escrow Bank is not obligated to provide an accounting for any fund or account that (a) has a balance of \$0.00 and (b) has not had any activity since the last reporting date.

The District shall indemnify, defend and hold harmless the Escrow Agent and its officers, directors, employees, representatives and agents, from and against and reimburse the Escrow Agent for any and all claims, obligations, liabilities, losses, damages, actions, suits, judgments, reasonable costs and expenses (including reasonable attorneys' and agents' fees and expenses) of whatever kind or nature

regardless of their merit, demanded, asserted or claimed against the Escrow Agent directly or indirectly relating to, or arising from, claims against the Escrow Agent by reason of its participation in the transactions contemplated hereby, except to the extent caused by the Escrow Agent's gross negligence or willful misconduct. The provisions of this Section 8 shall survive the termination of this Agreement or the earlier resignation or removal of the Escrow Agent.

SECTION 9. *Termination of Agreement.* Upon payment in full of the Refunded Bonds, and upon payment of all fees, expenses and charges of the Escrow Agent as described above, this Agreement shall terminate and the Escrow Agent shall be discharged from any further obligation or responsibility hereunder.

SECTION 10. *Execution in Counterparts.* This Agreement may be executed in several counterparts, each of which shall be an original and all of which shall constitute but one and the same instrument. The exchange of copies of this Agreement and of signature pages by facsimile or PDF transmission shall constitute effective execution and delivery of this Agreement as to the parties hereto and may be used in lieu of the original Agreement and signature pages for all purposes.

SECTION 11. *Applicable Law.* This Agreement shall be governed by and construed in accordance with the laws of the State of California.

BELLEVUE UNION SCHOOL DISTRICT

By: _____
Superintendent

**THE BANK OF NEW YORK MELLON
TRUST COMPANY, N.A.**
*as Escrow Agent and Prior Paying
Agent*

By: _____
Authorized Officer

EXHIBIT A

IDENTIFICATION OF REFUNDED BONDS

2014A Bonds

Maturities Payable from Escrow	CUSIP†	Principal Amount	Redemption Date	Redemption Price
	079113		8/1/2024	
	079113		8/1/2024	
	079113		8/1/2024	
	079113		8/1/2024	
	079113		8/1/2024	
	079113		8/1/2024	
	079113		8/1/2024	
	079113		8/1/2024	

† CUSIP Copyright American Bankers Association. CUSIP data herein is provided by Standard & Poor's CUSIP Service Bureau, a division of McGraw Hill Companies, Inc.

EXHIBIT B

IDENTIFICATION OF ORIGINAL FEDERAL SECURITIES

Type	Maturity Date	Par	Rate	Total Cost
TOTALS				

EXHIBIT C
REFUNDED BONDS PAYMENT SCHEDULE

Payment Date	Interest	Principal Redeemed	Redemption Premium	Total Payment
TOTALS				

EXHIBIT D

FORM OF DEFEASANCE NOTICE

NOTICE OF PARTIAL ADVANCE DEFEASANCE

Relating to the advance refunding of
certain maturities of

\$4,200,000

**Bellevue Union School District
(Sonoma County, California)
General Obligation Bonds
Election of 2014, Series A**

NOTICE IS HEREBY GIVEN by the Bellevue Union School District of Sonoma County, California (the "District") that, on _____, 2022, an irrevocable escrow fund has been established with The Bank of New York Mellon Trust Company, N.A., Los Angeles, California, as escrow agent (the "Escrow Agent"), securing the payment a portion of certain maturities of the above-captioned bonds (the "Prior Bonds") as more particularly identified in the following table (those portions to be refunded, being the "Refunded Bonds"):

BELLEVUE UNION SCHOOL DISTRICT Identification of Refunded 2014A Bonds*

Maturities Payable from Escrow	CUSIP†	Principal Amount	Redemption Date	Redemption Price
	079113		8/1/2024	
	079113		8/1/2024	
	079113		8/1/2024	
	079113		8/1/2024	
	079113		8/1/2024	
	079113		8/1/2024	
	079113		8/1/2024	
	079113		8/1/2024	

**Preliminary; subject to change. Represents all remaining outstanding maturities of the 2011 Refunding Bonds.*

† CUSIP Copyright American Bankers Association. CUSIP data herein is provided by Standard & Poor's CUSIP Service Bureau, a division of McGraw Hill Companies, Inc. Neither the District nor the Underwriter is responsible for the accuracy of such data.

The deposit for purposes of defeasing the Refunded Bonds has been made pursuant to an Escrow Agreement, dated _____, 2022 (the "Escrow Agreement"), by and between the District and the Escrow Agent. Under the Escrow Agreement, moneys have been deposited with the Escrow Agent which have been verified to be sufficient to pay principal of and interest and redemption price of the Refunded Bonds through and including the Redemption Date identified above, including accrued interest. Such

moneys have been irrevocably pledged to the payment of principal, interest and premium on the Refunded Bonds, and will be invested in federal securities which have been verified to be sufficient in time and amount to pay debt service and redemption price of the Refunded Bonds in accordance with the above table.

THIS IS NOT A NOTICE OF REDEMPTION. THIS NOTICE IS FOR INFORMATION PURPOSES ONLY, AND DOES NOT REQUIRE OR SOLICIT THE PRESENT SURRENDER OR EXCHANGE OF THE DESCRIBED BONDS.

Dated: _____, 2022

The Bank of New York Mellon Trust
Company, N.A.,
as Paying Agent



March 28, 2022

RE: **Bellevue Union School District
Refunding General Obligation Bonds**

Based upon your request and preliminary review of the information provided to-date, First Foundation Public Finance ("FFPF") would like express its interest in underwriting and obtaining credit approval for the following Credit Facility to the Bellevue Union School District, CA ("Borrower") based on the terms outlined below. This Letter is provided by First Foundation Public Finance for discussion purposes only. *It is not intended to be binding, does not create any obligation on the part of First Foundation Public Finance to Sponsor or any third party, and is not a commitment to lend or agreement of any kind. No obligation whatsoever on the part of First Foundation Public Finance shall arise until execution and delivery of a formal commitment or loan documentation by a duly authorized officer of First Foundation Public Finance, which obligation shall be subject to all of the conditions contained therein.*

The proposed loan conditions are:

STRUCTURE: Term / Cinderella (taxable converting to tax-exempt)

PURPOSE: Refunding of existing General Obligation Bonds

MAX. LOAN AMT: \$4,000,000

INTEREST RATE: Taxable: 3.70% Tax-exempt BQ: 2.70%

RATE LOCK: The Rate will be locked for 60 days prior to dosing. If the Credit Facility fails to close within this period, FFPF reserves the right to adjust the rate.

TERM: 22-years

REPAYMENT: Semi-annual interest and principal payments

AVERAGE LIFE: 15.89-years

PRE-PAYMENT: Prepayment on any payment date at 103% in years 1-2, declining to 102% in years 3-4, and 101% in years 5-6. Redeemable at par beginning in year 7 and thereafter.

COLLATERAL: Obligation to levy property taxes

ADDITIONAL TERMS: Documents to be prepared by the Borrower's Bond Counsel for review by FFPF's counsel Nixon Peabody, LLP. Legal fees and expenses of Nixon Peabody, LLP should not exceed \$8,500. All other filing fees and related fees shall be paid by the Borrower in connection with the issuance (including applicable CDIA fees).

Periodic financial and collateral reporting by the Borrower, as well as representations and warranties of the Borrower regarding its status and ability to repay, taxability gross-up and covenants and conditions that are appropriate for a Credit Facility of the scope and nature proposed above will be determined as part of FFPF's underwriting and credit approval process.

PDF's of all executed and other documents listed on the Closing Index shall be provided to FFPF no later than 24 hours before the time of the requested wire; provided, that if any documents can only be signed after receipt of the wire, those documents shall be provided immediately after receipt of the wire.

A default rate of Interest + 3.00% will be required.

Notice: The Federal Equal Credit Opportunity Act prohibits creditors from discriminating against credit applicants on the basis of race, color, religion, national origin, sex, marital status, age (provided the applicant has the capacity to enter into a binding contract); because all or part of the applicant's income derives from any public assistance program; or because the applicant has in good faith exercised any right under the Consumer Credit Protection Act. The federal agency that administers compliance with this law concerning this creditor is the Federal Deposit Insurance Corporation, Consumer Response Center, 1100 Walnut Street, Box #11, Kansas City, MO 64106.

Bellevue Union School District

Agenda Item for Board Meeting of June 30, 2020

Agenda Category: Review and Action

Agenda Item Title: Social Emotional Learning Curriculum Adoption

Prepared By: Tracy Whitaker, M.A., Director of Student Services & COVID-19 Coordinator

Background: The district has embarked on a collaborative process to select a comprehensive curriculum that will support the social emotional development of our students. The MTSS Committee and Mental Health Team engaged in discussion, brought input from each site, narrowed down criteria, previewed selected curriculum, and made a recommendation as to which curriculum would best meet the needs of the district. Character Strong's Purposeful People curriculum supports Pre-K–5th grade. The Character Strong SEL Curriculum supports 6th grade.

Recommended Action:

It is recommended that the Board of Trustees approve

Supporting Documents:

Purposeful People one page summary
Purposeful People Vertical Alignment At-A-Glance
Purposeful People Expansion
Purposeful People Scope & Sequence
Purposeful People CASEL Alignment
Character Strong Middle School Scope & Sequence (6th grade only)
Character Strong Middle School SEL Curriculum & CASEL Framework

3 THINGS TO KNOW

1. Grade-level-specific curriculum resources
2. Educator-friendly website organization
3. Partnership between character development and social & emotional skills

RESEARCH-BACKED OUTCOMES

We combined the character traits you know and love with social & emotional learning skills to produce 3 important outcomes for students:



Be Kind
social skills

Respect
Empathy
Cooperation



Be Strong
executive functioning

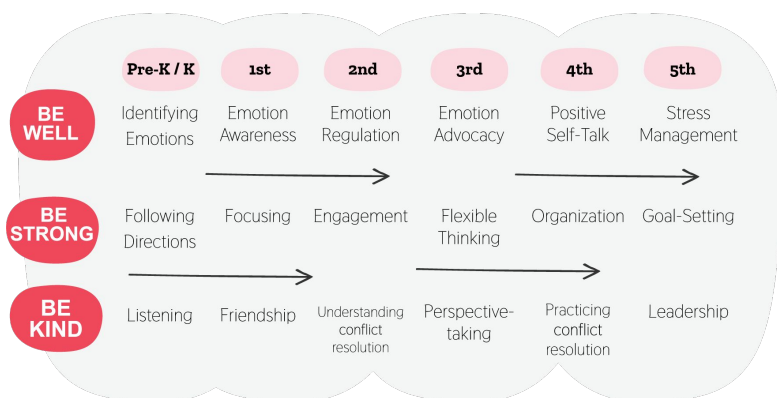
Responsibility
Perseverance
Courage



Be Well
emotion regulation

Gratitude
Honesty
Creativity

VERTICALLY-ALIGNED SEL FOCUS



ADDITIONAL RESOURCES

- Original music and videos
- Sortable book and video libraries
- Emotion regulation tools
- Conflict resolution tools
- Assessment tools
- Implementation videos
- Curriculum integration resources
- Student recognition resources
- Staff and family resources
- Playground activities...and more!

FLEXIBLE IMPLEMENTATION OPTIONS

- Curriculum organized by monthly character traits
- Multiple implementation options (daily, weekly, or anything in between)
- 5 lesson parts for each week

ANIMATED CHARACTERS





CHARACTERSTRONG MIDDLE SCHOOL SEL Curriculum & CASEL Framework

Anchor Standard	Learning Standards	Grade 6	Grade 7	Grade 8
Self-Awareness	Student demonstrates an understanding of one's emotions	S17: Understanding Emotions S18: Regulating Emotions, Part 1 S27: Connecting Motivation & Emotion S28: Regulating Emotions, Part 2	S08: Understanding Emotions S09: Identifying Emotions S10: Expanding Emotion Vocabulary	S14-15: Understanding How Emotions Work S25: Developing Strategies for Teamwork S26: Regulating Emotions on a Team S27: Engaging in Empathy on a Team
	Student demonstrates knowledge of personal strengths, challenges, cultural, linguistic assets, and aspirations.	S03: Middle School Mythbusting (Belonging) S04: Middle School Mythbusting (Test-Taking) S05: Developing Community Agreements S07: Understanding the CharacterDare Process S10: Exploring Values S22: Strengthening Friendships	S20: Understanding Mental Health and Well-being S05: Identifying Values S06: Connecting Values & Actions	S09: Developing Anchor Values S10: Building Positive Habits S11: Evaluating Habits S12-13: Increasing Self-Acceptance S34-35: Reflecting on the Year
	Student demonstrates awareness of personal rights and responsibilities.	S06: Upholding Community Agreements S33-35: Reflecting on the Year	S04: Upholding Community Agreements S33-35: Reflecting on the Year	S04: Upholding Community Agreements S10: Building Positive Habits S29-33: Being School Leaders
	Student demonstrates an awareness of when help is needed and who can provide it.	S08: Get to Know Your School: Who's Here?	S15: Understanding Social Connections	S27: Engaging in Empathy on a Team S29-33: Being School Leaders



CHARACTERSTRONG MIDDLE SCHOOL SEL Curriculum & CASEL Framework

Anchor Standard	Learning Standards	Grade 6	Grade 7	Grade 8
Self-Management	Student demonstrates the skills to manage and express one's emotions, thoughts, impulses, and stress in constructive ways.	S17: Understanding Emotions S18: Regulating Emotions, Part 1 S27: Connecting Motivation & Emotion	S11: Practicing Emotion Regulation S12: Applying Emotion Regulation S13: Understanding Stress S14: Coping with Stress	S11: Evaluating Habits S16: Reflecting on Emotion Regulation S17: Practicing Self Regulation S18: Building an Emotion Regulation Toolbox S25: Developing Strategies for Teamwork S26: Regulating Emotions on a Team
	Student demonstrates the skills to set, monitor, adapt, achieve, and evaluate goals.	S07: Understanding the CharacterDare Process S33-35: Reflecting on the Year	S13: Understanding Stress S14: Coping with Stress S34-35: Reflecting on the	S11: Evaluating Habits S21: Regulating Emotions in Academics S34-35: Reflecting on the Year
Social Awareness	Student demonstrates empathy for other people's emotions, perspectives, cultures, languages, and histories.	S15: Understanding Others' Perspectives S16: Practicing Perspective-Taking S23: Applying Listening Skills, Part 2 S24: Listening with Empathy	S15: Understanding Social Connections S16: Developing Social Awareness S17: Understanding Effective Empathy S18: Recognizing When People Need Support S19: Practicing Effective Empathy	S22: Using Values to Increase Belonging S23: Understanding the Value of Teamwork S24: Practicing Effective Teamwork for Impact S25: Developing Strategies for Teamwork S26: Regulating Emotions on a Team S27: Engaging in Empathy on a Team
	Student contributes productively to one's school, workplace, and community.	S04: Middle School Mythbusting (Test-Taking) S12: Practicing Values S32: Helping Others Resolve Conflict	S15: Understanding Social Connections S19: Practicing Effective Empathy	S23: Understanding the Value of Teamwork S24: Practicing Effective Teamwork for Impact S25: Developing Strategies for Teamwork S29-33: Being School Leaders



CHARACTERSTRONG MIDDLE SCHOOL SEL Curriculum & CASEL Framework

Anchor Standard	Learning Standards	Grade 6	Grade 7	Grade 8
Social Awareness	Student demonstrates an awareness and respect for one's similarities and differences with others.	S06: Upholding Community Agreements S10: Exploring Values S11: Understanding Values S21: Developing Friendships S22: Strengthening Friendships S25: Exercising Perspective-Taking S29: Making New Friends S30: Becoming a Better Friend	S01: Building Connections S02: Building Community S16: Developing Social Awareness	S01: Building Connections S02: Building Community S25: Developing Strategies for Teamwork
	Student recognizes leadership capacity in themselves and others.	S05: Developing Community Agreements S32: Helping Others Resolve Conflict	S06: Connecting Values & Actions S07: Applying Values S33-35: Reflecting on the Year	S22: Using Values to Increase Belonging S23: Understanding the Value of Teamwork S24: Practicing Effective Teamwork for Impact S25: Developing Strategies for Teamwork S29-33: Being School Leaders



CHARACTERSTRONG MIDDLE SCHOOL SEL Curriculum & CASEL Framework

Anchor Standard	Learning Standards	Grade 6	Grade 7	Grade 8
Relationship Skills	Student uses a range of communication skills to interact effectively with individuals of diverse backgrounds, abilities, languages, and lifestyles.	S09: Get to Know Your School: What's Here? S13: Building Listening Skills	S24: Communicating with Assertiveness S25: Practicing Assertiveness S26: Learning to Compromise	S25: Developing Strategies for Team S27: Engaging in Empathy on a Team S28: Exercising Listening on a Team
	Student cultivates constructive relationships with individuals of diverse backgrounds, abilities, languages, and lifestyles.	S01: Building Connections S02: Building Community S03: Middle School Mythbusting S13: Building Listening Skills S14: Applying Listening Skills (1) S15: Understanding Others' Perspectives S16: Practicing Perspective-Taking S21: Developing Friendships S24: Listening With Empathy S25: Exercising Perspective-Taking S29: Making New Friends S30: Becoming a Better Friend	S01: Building Connections S02: Building Community S19: Practicing Effective Empathy S26: Learning to Compromise	S01: Building Connections S02: Building Community S23: Using Values to Increase Belonging S24: Practicing Effective Teamwork for Impact
	Student demonstrates the skills to respectfully engage in and resolve interpersonal conflicts in various contexts.	S08: Get to Know Your School: Who's Here? S19: Using Values in Conflict Resolution S20: Understanding Conflict Resolution S22: Strengthening Friendships S23: Applying Listening Skills (2)	S26: Learning to Compromise S27: Handling Conflict S28: Reflecting on Conflict Resolution	S19: Connecting Values & Emotion Regulation S24: Practicing Effective Teamwork for Impact S25: Developing Strategies for Team work Challenges



CHARACTERSTRONG MIDDLE SCHOOL SEL Curriculum & CASEL Framework

Anchor Standard	Learning Standards	Grade 6	Grade 7	Grade 8
Responsible Decision-Making	Student considers the well-being of self and others when making decisions.	S05: Developing Community Agreements S06: Upholding Community Agreements S26: Connecting Through Perspective-Taking S31: Resolving Conflicts with Friends	S21: Exercising Well-Being S22: Increasing Personal Well-Being S23: Developing Well-Being Habits S29-32: Well-Being in Action	S17: Practicing Self-Regulation S18: Building an Emotion Regulation Toolbox S19: Connecting Values & Emotion Regulation S20: Practicing Emotion Regulation S21: Regulating Emotions in Academics S27: Engaging in Empathy on a Team S29-33: Being School Leaders
	Student uses a systematic approach to decision making in a variety of situations.	S26: Connecting Through Perspective-Taking S27: Connecting Motivation & Emotions	S23: Developing Well-Being Habits S27: Handling Conflict	S10: Building Positive Habits S25: Developing Strategies for Teamwork Challenges
	Student applies problem-solving skills to engage responsibly in a variety of situations.	S04: Middle School Mythbusting S19: Using Values in Conflict Resolution S20: Understanding Conflict Resolution S26: Connecting Through Perspective S27: Connecting Motivation & Emotions S33-34: Reflecting on the Year	S23: Developing Well-Being Habits S27: Learning to Compromise S33-35: Reflecting on the Year	S11: Evaluating Habits S24: Practicing Effective Teamwork S23: Understanding the Value of Teamwork



CHARACTERSTRONG MIDDLE SCHOOL SEL Curriculum & ASCA Standards

Category	Standards	Grade 6	Grade 7	Grade 8
Mindset Standards	M1: Belief in development of whole self, including a healthy balance of mental, social/emotional, and physical well-being	S03: Middle School Mythbusting (Belonging) S07: Understanding the CharacterDare Process S10: Exploring Values S13: Building Listening Skills S14: Applying Listening Skills: Part 1 S15: Understanding Others' Perspectives S16: Practicing Perspective-Taking S33-35: Reflecting On The Years	S09: Identifying Emotions S10: Expanding Emotion Vocabulary S11: Practicing Emotion Regulation S12: Applying Emotion Regulation S14: Coping with Stress S20: Understanding Mental Health & Well-Being S21: Exercising Well-Being S23: Developing Well-Being Habits S29-32: Well-Being In Action S33-35: Reflecting On The Year	S14-15: Understanding How Emotions Work S20: Practicing Emotion Regulation
	M2: Self-confidence in ability to succeed	S05: Developing Community Agreements S06: Upholding Community Agreements S07: Understanding the CharacterDare Process	S24: Communicating with Assertiveness S25: Practicing Assertiveness S31-32: Well-Being In Action	S09: Developing Anchor Values S10: Building Positive Habits S11: Evaluating Habits S12-13: Increasing Self-Acceptance S20: Practicing Emotion Regulation S21: Regulating Emotions in Academics
	M3: Sense of belonging in the school environment	S01: Building Connections S02: Building Community S08: Get to Know Your School: Who's Here? S09: Get to Know Your School: What's Here? S10: Exploring Values S29: Making New Friends S30: Becoming A Better Friend	S15: Understanding Social Connections S17: Understanding Effective Empathy S18: Recognizing When People Need Support S19: Practicing Effective	S22: Using Values to Increase Belonging



CHARACTERSTRONG MIDDLE SCHOOL SEL Curriculum & ASCA Standards

Category	Standards	Grade 6	Grade 7	Grade 8
Mindset Standards	M4: Understanding that postsecondary education and life-long learning are necessary for long-term career success			S09: Developing Anchor Values S10: Building Positive Habits S11: Evaluating Habits S21: Regulating Emotions in Academics
	M5: Belief in using abilities to their fullest to achieve high-quality results and outcomes	S04: Middle School Mythbusting (Test Taking) S33-35: Reflecting On The Year	S21: Exercising Well-Being S22: Increasing Personal Well-Being S23: Developing Well-Being Habits S30-32: Well-Being In Action	S09: Developing Anchor Values S10: Building Positive Habits S11: Evaluating Habits S12-13: Increasing Self-Acceptance S21: Regulating Emotions in Academics
	M6: Positive attitude toward work and learning	S33-35: Reflecting On The Year	S33-35: Reflecting On The Year	S10: Building Positive Habits S11: Evaluating Habits S12-13: Increasing Self-Acceptance S21: Regulating Emotions in Academics



CHARACTERSTRONG MIDDLE SCHOOL SEL Curriculum & ASCA Standards

Category	Standards	Grade 6	Grade 7	Grade 8
Behavior Standards	Learning Strategies: Processes and tactics students employ to aid in the cognitive work of thinking, remembering, or learning.	S03: Middle School Mythbusting (Belonging) S04: Middle School Mythbusting (Test Taking) S05: Developing Community Agreements S06: Upholding Community Agreements	S21: Exercising Well-Being S22: Increasing Personal Well-Being S23: Developing Well-Being Habits S26: Learning to Compromise S27: Handling Conflict S28: Reflecting on Conflict Resolution S30-32: Well-Being In Action S33-35: Reflecting On The Year	S09: Developing Anchor Values S10: Building Positive Habits S11: Evaluating Habits S13: Increasing Self-Acceptance S21: Regulating Emotions in Academics
	Self-Management Skills: Continued focus on a goal despite obstacles (grit or persistence) and avoidance of distractions or temptations to prioritize higher pursuits over lower pleasures (delayed gratification, self-discipline, self-control).	S04: Middle School Mythbusting S05: Developing Community Agreements S06: Upholding Community Agreements S07: Understanding the CharacterDare Process S11: Understanding Values S17: Understanding Emotions S18: Regulating Emotions Part 1 S19: Using Values in Conflict Resolution S20: Understanding Conflict Resolution S27: Connecting Motivation & Emotions S28: Regulating Emotions Part 2 S31: Resolving Conflicts with Friends S32: Helping Others Resolve Conflicts S33-35: Reflecting On The Year	S09: Identifying Emotions S10: Expanding Emotion Vocabulary S11: Practicing Emotion Regulation S12: Applying Emotion Regulation S13: Understanding Stress S14: Coping with Stress S21: Exercising Well-Being S22: Increasing Personal Well-Being S23: Developing Well-Being Habits S26: Learning to Compromise S27: Handling Conflict S28: Reflecting on Conflict Resolution S30-32: Well-Being in Action	S09: Developing Anchor Values S10: Building Positive Habits S11: Evaluating Habits S12-13: Increasing Self-Acceptance S14-15: Understanding How Emotions Work S16: Reflecting on Emotion Regulation S17: Practicing Self Regulation S18: Building an Emotion Regulation Toolbox S19: Connecting Values & Emotion Regulation S20: Practicing Emotion Regulation S21: Regulating Emotions in Academics S22: Using Values to Increase Belonging



CHARACTERSTRONG MIDDLE SCHOOL SEL Curriculum & ASCA Standards

Category	Standards	Grade 6	Grade 7	Grade 8
Behavior Standards	Social Skills: Acceptable behaviors that improve social interactions, such as those between peers or between students and adults.	S01: Building Connections S02: Building Community S03-04: Middle School Mythbusting S05: Developing Community Agreements S06: Upholding Community Agreements S08: Get To Know Your School: Who's There? S09: Get to Know Your School: What's There? S11: Understanding Values S12: Practicing Values S13: Building Listening Skills S14: Applying Listening Skills Part 1 S15: Understanding Others' Perspectives S16: Practicing Perspective-Taking S17: Understanding Emotions S18: Regulating Emotions Part 1 S19: Using Values in Conflict Resolution S20: Understanding Conflict Resolution S21: Developing Friendships S22: Strengthening Friendships S23: Applying Listening Skills (Part 2) S24: Listening with Empathy	S09: Identifying Emotions S10: Expanding Emotion Vocabulary S11: Practicing Emotion Regulation S12: Applying Emotion Regulation S13: Understanding Stress S14: Coping with Stress S15: Understanding Social Connection S16: Developing Social Awareness S17: Understanding Effective Empathy S18: Recognizing When People Need Support S19: Practicing Effective Empathy S24: Communicating with Assertiveness S25: Practicing Assertiveness S26: Learning to Compromise S27: Handling Conflict S28: Reflecting on Conflict Resolution	S14-15: Understanding How Emotions Work S16: Reflecting on Emotion Regulation S17: Practicing Self Regulation S18: Building an Emotion Regulation Toolbox S19: Connecting Values & Emotion Regulation S20: Practicing Emotion Regulation S22: Using Values to Increase Belonging

CASEL S.A.F.E. Elements	PurposeFull People Components
SEQUENCED: Connected and coordinated activities to foster skills development	School-wide monthly focus on 1 character trait that is broken up into 4 weeks worth of activities that follows a sequenced order with Start-Connect-Grow-Respond-Exit
ACTIVE: Employing active forms of learning to help students strengthen new skills	All lessons and activities are designed for active student learning, collaboration, or real life application
FOCUSED: Dedicated time and attention to developing personal and social skills	Each week contains activities intentionally designed to build relationships through collaboration, community circles, and student-to-student interaction
EXPLICIT: Targeting specific social and emotional skills	The GROW section in each week provides explicit SEL lessons unique to each grade level



Components of the Curriculum



Be Kind

1 CHARACTER TRAITS

Respect, Empathy, Cooperation

2 SEL OUTCOME

Social Skills

3 SEL GRADE LEVEL FOCUS

PK/K- Listening
1ST - Friendship
2ND - Understanding Conflict Resolution
3RD - Perspective-Taking
4TH - Practicing Conflict Resolution
5TH - Leadership



Be Strong

1 CHARACTER TRAITS

Responsibility, Perseverance, Courage

2 SEL OUTCOME

Executive Functioning

3 SEL GRADE LEVEL FOCUS

PK/K- Following Directions
1ST - Focusing
2ND - Engagement
3RD - Flexible Thinking
4TH - Organization
5TH - Goal-Setting



Be Well

1 CHARACTER TRAITS

Gratitude, Honesty, Creativity

2 SEL OUTCOME

Emotional Regulation

3 SEL GRADE LEVEL FOCUS

PK/K- Identifying Emotions
1ST - Emotion Awareness
2ND - Emotion Regulation
3RD - Emotion Advocacy
4TH - Positive Self-Talk
5TH - Stress Management

Weekly Lesson Components: START, CONNECT, GROW, RESPOND, EXIT

These five components are the building blocks of PurposeFull People and are designed to be taught each week. Designed for flexibility, lessons can stand alone or be combined in a variety of ways. Educators can present all five lesson components in one 45-60 minute weekly lesson, deliver one component per day (10-20 minutes), or adjust lessons to meet a variety of scheduling needs.

START

Intentional activities and rituals designed to build deep understanding of each character trait through the lens of social and emotional learning. START lessons include character-trait sing-alongs, stories, quotes, and illustrations to spark rich discussion and application.

CONNECT

Fun, engaging activities that build relationships among students, creating positive classroom culture. CONNECT lessons are slide-based and interactive.

GROW

These lessons are the heart of the content, centered around the grade level SEL focus, overarching outcome, and character trait. GROW lessons range from explicit SEL instruction to unique opportunities to put character traits into practice.

RESPOND

This section contains a toolkit of strategies and resources that can be used to help kids respond to a variety of situations. RESPOND includes calming activities for emotion regulation, brain boosters to increase energy and focus, and circle prompts that can be used for reflection and discussion in Morning Meetings, Community Circles, etc.

EXIT

EXIT activities focus on connections and reflections. They create rituals and routines around the end of the day, building a positive classroom culture.

PURPOSEFULL PEOPLE OUTCOME BE Kind		CHARACTER TRAITS: Empathy, Respect, Cooperation SEL FOCUS: Social Skills				
PurposeFull People		CASEL Core SEL Competencies				
Activity Component	Grade Levels (GROW SECTION: SEL FOCUS)	Self-Awareness	Self-Management	Social Awareness	Relationship Skills	Responsible Decision Making
START	PK-5					
CONNECT	PK-5					
GROW	PK/KINDERGARTEN Listening					
	1ST GRADE Friendship					
	2ND GRADE Understanding Conflict Resolution					
	3RD GRADE Perspective-Taking					
	4TH GRADE Practicing Conflict Resolution					
	5TH GRADE Leadership					
RESPOND	PK-5					
EXIT	PK-5					

PURPOSEFULL PEOPLE OUTCOME BE STRONG		CHARACTER TRAITS: Courage, Perseverance, Responsibility SEL FOCUS: Executive Functioning				
PurposeFull People		CASEL Core SEL Competencies				
Activity Component	Grade Levels (GROW SECTION: SEL FOCUS)	Self-Awareness	Self-Management	Social Awareness	Relationship Skills	Responsible Decision Making
START	PK-5					
CONNECT	PK-5					
GROW	PK/KINDERGARTEN Following Directions					
	1ST GRADE Focusing					
	2ND GRADE Engagement					
	3RD GRADE Flexible Thinking					
	4TH GRADE Organization					
	5TH GRADE Goal-Setting					
RESPOND	PK-5					
EXIT	PK-5					

PURPOSEFULL PEOPLE OUTCOME BE WELL		CHARACTER TRAITS: Gratitude, Honesty, Creativity SEL FOCUS: Emotional Regulation				
PurposeFull People		CASEL Core SEL Competencies				
Activity Component	Grade Levels (GROW SECTION: SEL FOCUS)	Self-Awareness	Self-Management	Social Awareness	Relationship Skills	Responsible Decision Making
START	PK-5					
CONNECT	PK-5					
GROW	PK/KINDERGARTEN Identifying Emotions					
	1ST GRADE Emotion Awareness					
	2ND GRADE Emotion Regulation					
	3RD GRADE Emotion Advocacy					
	4TH GRADE Positive Self-Talk					
	5TH GRADE Stress Management					
RESPOND	PK-5					
EXIT	PK-5					

Elementary Curriculum Overview

PURPOSEFULL PEOPLE EXPANSION AT A GLANCE

CharacterStrong is launching an expansion of our elementary curriculum, PurposeFull People, this summer! The goal of the PurposeFull People expansion is two-fold:

- (1) provide **grade-level-specific curriculum** resources presented in a educator-friendly format;
- (2) build in **explicit lessons for key social and emotional skills**, creating a curriculum that deeply integrates character development with social & emotional learning (SEL).

Months of collecting educator input and consulting with researchers resulted in the following list of specific expansion goals. Click to view details and descriptions of each:

1. [Grade-level specific curriculum \(PreK to 5th grade\)](#)
2. [Character traits + 3 SEL outcomes, including explicit SEL lessons](#)
3. [Website reorganized for easier lesson-planning, while maintaining flexibility](#)
4. [5 Flexible Components of each weekly lesson](#)
5. [Tools for emotion regulation and conflict resolution](#)
6. [Original animated videos, live action video, and songs](#)
7. [NEW Campus resources, including data-collection tools](#)

FAQs

RESEARCH

1. *Grade-level specific curriculum (PreK to 5th grade)*

Educators will access their lessons and activities from their own grade level curriculum page! Each grade level page includes 9 character traits, which each contain a month's worth of lessons and activities. The content is organized by week and created for flexible implementation.

2. Character traits + 3 SEL outcomes, including explicit SEL lessons



3. Website reorganized for easier lesson-planning, while maintaining flexibility

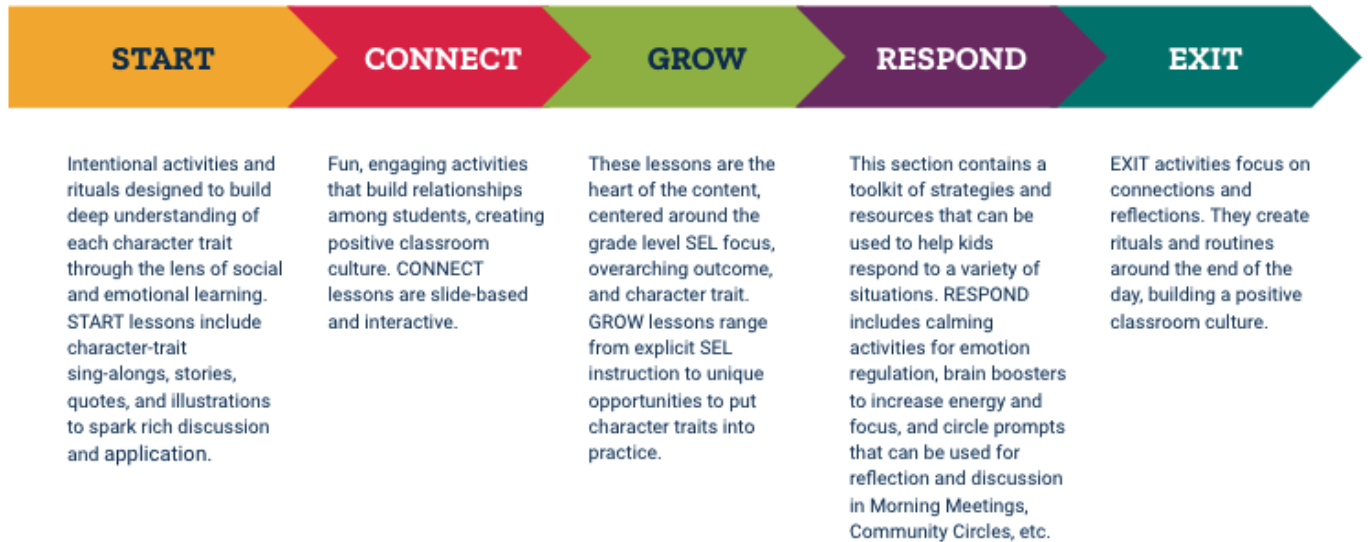
Since our implementation calendars are widely used by educators, we moved to a more chronological organization of our curriculum website. This means that when educators access the website, they will see lessons organized by each week of the month. They will still have the ability to skip around and access any lessons they choose, but the default view allows users to move through the week's lessons without depending on the implementation calendar resources.

4. 5 Flexible Components of each weekly lesson



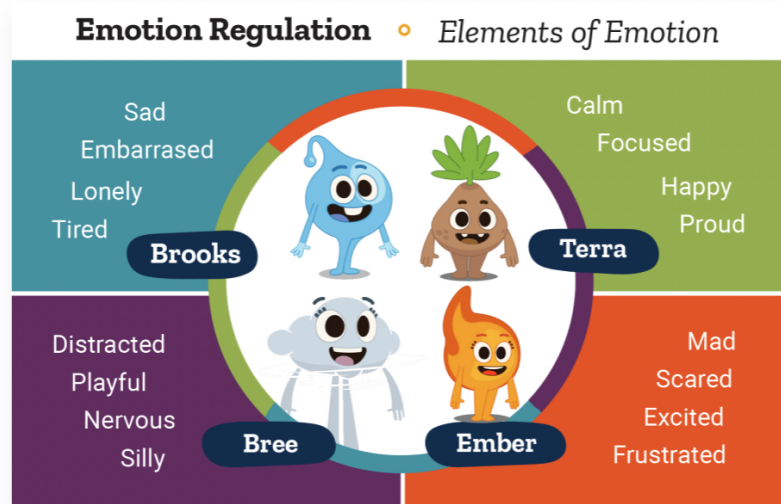
These five components are the building blocks of PurposeFull People and are designed to be taught each week. We streamlined and simplified the previous lesson components, while continuing our commitment to flexibility for educators. Educators can present all five components in one 45-60 minute lesson each week, divide it out and teach one component per day, or adjust to meet a variety of scheduling needs.

Lesson components:



5. Specific, original tools for emotion regulation and conflict resolution

We have created our own tools to assist students in identifying their emotions for the purpose of building self-awareness and self-regulation skills (see the PreK-2nd grade version below). Research shows that we can more easily regulate our



emotions when we can accurately identify our emotions. In addition, learning strategies for self-management when conflict arises is critical to making good decisions. We have created a Conflict Resolution tool to equip students to more effectively manage conflict.

6. *Original animated videos, live action videos, and songs*

We partnered with songwriters, vocalists, video producers, animators, and designers to construct characters, songs, video resources, and stories to enhance our curriculum. Original characters will create engagement and excitement around

Be Kind



Sol

Be Strong



Ida

Be Well



Tré

social, emotional
and character
development!

7. *New Campus Resources, including data collection tools*

Our Campus Resources page provides centralized access to a wide variety of tools to support a comprehensive approach to SEL and character development work.

- Original music and videos
- Sortable book and video libraries
- Downloadable tools and posters
 - Emotion regulation tools
 - Conflict resolution tools
 - Illustrations and quotes
 - Definition posters
- Assessment tools
- Implementation videos
- Curriculum integration resources
- Student recognition resources
- Staff and family resources
- Playground activities...and more!

FAQs

Does PurposeFull People include explicit SEL lessons?

Yes! Each grade level has its own focus in each of these overarching SEL topics: executive functioning, social skills, and emotion regulation. SEL lessons are concentrated in the GROW lesson each week (20-30 minutes per week).

Are lessons scripted?

Not typically. We respect the desire and ability for each educator to practice autonomy when implementing PurposeFull People. Lessons include instructions and specific discussion prompts, but there is flexibility and freedom for each teacher to make lessons their own.

How much time should be allocated for PfP lessons?

Time allotment is 100% flexible! Our model is a weekly collection of 5 lessons that can be delivered in a variety of ways: daily, twice a week, or weekly in a larger chunk of time. A week's worth of lessons total 45-60 minutes that can be divided up in a variety of ways!

Is there a recommended order in which schools should teach the character traits?

Our curriculum is designed for flexibility, so schools can choose any order. However, the default layout on our website begins with Respect, which includes some beginning-of-the-year protocols such as community agreements and circles. The default layout also arranges the traits so that instruction spirals through Be Kind, Be Well, and Be Strong all year. (Suggested order: begin with Respect in September, followed by Responsibility, Gratitude, Empathy, Perseverance, Honesty, Cooperation, Courage, and Creativity)

Who should deliver the lessons - counselor or classroom teacher?

Both! Because this work is rooted in building-relationships, we recommend that classroom teachers lead this work with their students. Research tells us that in order to impact student outcomes, schools need a comprehensive approach to SEL and character education.

Does PurposeFull People align with CASEL and/or ACSA?

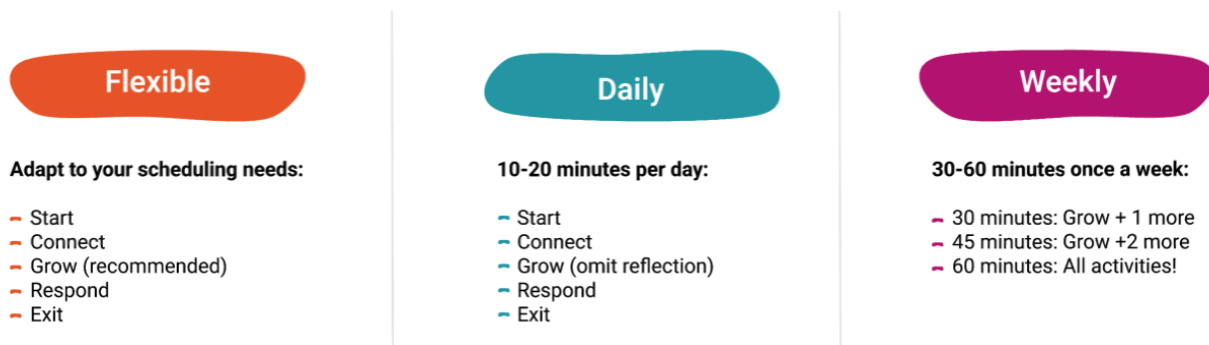
Yes! We have alignment documents that specify the details.

Can PurposeFull People be adapted and delivered virtually?

Some aspects of the curriculum can be adapted, however the primary focus is on in-person classroom connection. Research tells us this is the most effective approach to character development.

What are the options for implementation?

Each grade level has 5 activities in each given week: *Start, Connect, Grow, Respond, Exit*. Our curriculum is designed to accommodate a variety of implementation options! Here are the two most commonly utilized::



RESEARCH

Over the past two decades, a large body of scientific evidence has accumulated on the benefits of social-emotional learning and character education at the elementary level. PurposeFull People was designed to include evidence-based social-emotional learning and character education content and instructional strategies that intentionally target the promotion of outcomes that serve as enablers to students' school and life success, including acquisition and use of social-emotional competencies and improvements in sense of belonging, well-being, and engagement in school. Together, these outcomes (a) result in improved academic performance, (b) prepare students to transition successfully into middle school, and (c) are predictors of longer term success into adulthood (Bywater & Sharples, 2012; Corrales et al., 2016; Lei et al., 2018).

- Bywater, T. & Sharples, J. (2012) Effective evidence-based interventions for emotional well-being: Lessons for policy and practice, *Research Papers in Education*, 27(4), 389–408.
- Corrales, T., Waterford, M., Goodwin-Smith, I., Wood, L., Yourell, T., & Ho, C. (2016). Childhood adversity, sense of belonging and psychosocial outcomes in emerging adulthood: A test of mediated pathways. *Children and Youth Services Review*, 63, 110–119.
- Lei, H., Yunhuo, C. and Zhou, W. (2018), Relationship between student engagement and academic achievement: a meta-analysis. *Social Behavior and Personality*, 46, 517-528.

Social-Emotional Learning

A meta-analysis by Durlak and colleagues (2011) of 213 rigorous studies including over 270,000 students demonstrated that students who received SEL programming performed better than students who did not. Specifically, findings indicate that SEL programming was associated with an 11 percent gain on measures of academic achievement, and similar significant improvements were noted in student conduct and discipline, prosocial behavior, and emotional distress. A close inspection reveals that of the 213 studies, 120 (56%) were conducted in elementary schools, with consistent findings indicating that SEL programming is effective across elementary grades. Other researchers have conducted larger scale reviews and replicated these findings, which is one of the reasons why SEL programming has become an essential ingredient to Tier 1 universal supports in elementary schools (Corcoran et al., 2018; Sklad et al., 2012).

- Corcoran, R.P., Cheung, A.C.K., Kim, E., & Xie, C. (2018). Effective universal school-based social and emotional programs for improving academic achievement: A systematic review and meta-analysis of 50 years of research *Educational Research Review*, 25 (2018), pp. 56-72.

- Durlak, J. A., Weissberg, R. P., Dymnicki, A. B., Taylor, R. D., & Schellinger, K. B. (2011). The impact of enhancing students' social and emotional learning: A meta-analysis of school-based universal interventions. *Child Development*, 82, 405–432.
- Sklad, M., Diekstra, R., Ritter, M. D., Ben, J., & Gravesteyn, C. (2012). Effectiveness of school-based universal social, emotional, and behavioral programs: Do they enhance students' development in the area of skill, behavior, and adjustment? *Psychology in the Schools*, 49(9), 892–909.

Character Education

With regard to character education, a meta analysis of 52 studies was conducted by Jeynes (2019) to examine the relationship between character education and student achievement and behavioral outcomes. Results indicated that character education was associated with higher levels of educational outcomes, including grades and test scores. The delivery of character education programming was also associated with increased self-discipline. While the effects for high school character education was higher than middle school and elementary, findings for elementary still found positive, significant effects on the above outcomes.

- Jeynes, W. H. (2019). A meta-analysis on the relationship between character education and student achievement and behavioral outcomes. *Education and Urban Society*, 51 (1), 33–71.
- Johnson, K. (2021). A preliminary meta-Analysis of character education research Fairleigh Dickinson University. ProQuest Dissertations Publishing.

Teaching Social Skills

Numerous studies have investigated the impact of teaching elementary-aged students social skills. The findings from this research are clear: teaching social skills interventions to children between the ages of 5-11 leads to a range of beneficial outcomes, including (a) increases in social competencies such as cooperation, assertiveness, and conflict resolution, (b) improvements in prosocial interactions and social inclusion, and (c) decreases in aggressive and disruptive behaviors (e.g., Durlak et al., 2010; Gresham et al., 2004; January et al., 2011). The research also reveals some nuanced findings that impact whether a program that teaches social skills is likely to be effective or not. First, social skills programs that use a direct and explicit instructional approach that involves telling (what the skill is and why it is important), showing (modeling what the skill looks like), doing (providing opportunities to practice the skill), and performance feedback (observing students to) are more effective than programs that use other types of instructional approaches (Gresham, 2017, Lane et al. 2005). Second, students need to receive a certain amount of instruction and support over time to acquire and apply social skills (Gresham et al., 2004). Third, students need to be supported to generalize the skills beyond the lessons through prompts and reminders, recognizing and acknowledging attempts to apply certain skills, and addressing missed opportunities to use the skills (Fox & McEvoy, 1993; DiPerna et al., 2017). Last, teachers need to maintain fidelity to teaching the social skills as planned to ensure students receive the instruction and support in a way that is likely to lead to beneficial outcomes (Durlak et al., 2008).

- DiPerna, J.C., Lei, P., Cheng, W. Hart, S. & Bellinger, J. (2017). A cluster randomized trial of the social skills Improvement system-classwide intervention program (SSIS-CIP) in first grade *Journal of Education & Psychology*, 23, 145-167.
- Durlak, J. A., & Dupre, E. . P. (2008). Implementation matters: A review of research on the influence of implementation on program outcomes and the factors affecting implementation. *American Journal of Community Psychology*, 41, 327–350.

- Durlak, J. A., Weissberg, R. P., & Pachan, M. (2010). A meta-analysis of after-school programs that seek to promote personal and social skills in children and adolescents. *American Journal of Community Psychology*, 45, 294–309.
- Fox, J.J., & McEvoy, M.A. (1993). Assessing and enhancing generalization and social validity of social-skills interventions with children and adolescents. *Behavior Modification*, 17, 339–366.
- Gresham, F. M., Cook, C. R. , & Crews, S. D. (2004). Social skills training for children and youth with emotional and behavioral disorders: Validity considerations and future directions. *Behavioral Disorders*, 30(1), 32-47.
- Gresham, F. M. (2017). Evidence-based interventions for social skill deficits in children and adolescents. In *Handbook of evidence-based interventions for children and adolescents* (pp. 365–376). New York city: Springer Publishing Company, LLC.
- January, A.M, Casey, R.J., & Paulson, D. (2011). A meta-analysis of classroom-wide interventions to build social skills: Do they work? *School Psychology Review*, 40 (2), 242-256.
- Lane, K. L., Menzies, H. M., Barton-Arwood, S. M., Doukas, G. L., & Munton, S. M. (2005). Designing, implementing, and evaluating social skills interventions for elementary students: Step-by-step procedures based on actual school-based investigations. *Preventing School Failure*, 49(2), 18-26.

Teaching Executive Functioning Skills

Executive function skills include cognitive flexibility (ability to adapt to new, changing, or unplanned events), inhibition (self-control, self-regulation to resist temptations to engage in behaviors that are ill-advised), attention regulation (focusing and concentrating in the face of distractions), and organization (planning, time management, and keeping track of materials) (Diamond, 2013). Executive functioning skills have been shown to be more important predictors of school success than IQ (Blair & Razza, 2007). Executive functioning skills also predict a person's success throughout their life, including career (Prince, et al., 2007) and mental and physical health in adulthood (Dunn, 2010; Kusche et al., 1993). A meta analysis including 12 studies involving 1054 children found that teaching children executive functioning skills improved organizational skills. Also, a review published in *JAMA Pediatrics* (Pandey et al., 2018) revealed that universal programs focused on teaching executive functioning skills to children are associated with several social-emotional outcomes such as improvements in academic achievement, promotion of mental health, decreases in behavioral problems, and reductions in school discipline. Other meta-analyses have found that programs that teach specific executive functioning skills demonstrate improvements in organizational skills, self-control, and ability to maintain attention to focus on tasks at hand (e.g., Bikic et al., 2017; Diamond & Lee, 2011). The science on teaching executive skills has revealed some important quality indicators of effective programs, including explicit instruction that involves opportunities for rehearsal and feedback, supplemental strategies to promote the generalization and use of the skills beyond the lessons, and supports to maintain fidelity of implementation.

- Bikic, A., Reichow, B., McCauley, S.A., Ibrahim, K., & Sukhodolsky, D.G. (2017). Meta-analysis of organizational skills interventions for children and adolescents with attention-Deficit/Hyperactivity disorder. *Clinical Psychology Review*, 52, 108–123.
- Diamond, A. (2013). Executive functions. *Annual Review of Psychology*, 64, 135–168.
- Diamond, A., & Lee, K. (2011). Interventions shown to aid executive function development in children 4 to 12 years old. *Science*, 333(6045), 959–964.
- Pandey, A., Hale, D., Das, S., Goddings, A.L., Blakemore, S.J., & Viner, R.M. (2018). Effectiveness of universal self-regulation–Based interventions in children and adolescents *JAMA Pediatrics*, 172 (6), 566.

- Piquero, A. R., Jennings, W. G., Farrington, D. P., Diamond, B., & Gonzalez, J. M. R. (2016). A meta-analysis update on the effectiveness of early self-control improvement programs to improve self-control and reduce delinquency. *Journal of Experimental Criminology*, 12, 249–264.

Teaching Emotional Regulation Skills

The research is clear that teaching elementary-aged children emotion recognition and regulation skills is effective when done properly. This body of research shows that when elementary students are intentionally supported to acquire skills to regulate emotions in response to situations it leads to several positive short-term outcomes, including improved confidence, greater persistence and resilience in the face of adversity, increased engagement in school along with better test scores and grades, and reductions in behaviors that interfere with learning (Corcoran et al., 2018; Kraag et al., 2006; Moltretch et al., 2010). From a long-term perspective, teaching emotion regulation skills leads to greater college and career readiness and success, healthier relationships, better mental health, and greater civic engagement (Greenberg et al., 2017). There is also evidence that when teaching emotion regulation skills is able to boost the effect of Tier 1 Positive Behavioral Intervention and Supports by producing more significant reductions in externalizing and internalizing problems among elementary students (Cook et al., 2015). Research examining what makes for effective programs that teach emotion recognition and regulation skills has revealed that following combination of components are important: (a) psychoeducation to increase children's understanding of emotions to develop a vocabulary to label their emotional experiences, (b) strategies to increase self-awareness and recognition of emotions and how they impact their behavior in certain situations, and (c) explicit teaching of emotion regulation skills to manage thoughts (e.g., positive self-talk, reappraisal, acceptance) and actions (e.g., such as deep breathing, guided imagery, progressive muscle relaxation, physical activity, mindfulness practices) (Barret et al., 2001; Macklem, 2011). In addition, there is a need for strategies that are infused throughout the day to prompt, encourage, and motivate students to apply their emotion knowledge and skills (Hoffman et al., 2020).

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Curriculum Components



Be Kind
social skills

CHARACTER TRAITS

Respect, Empathy, Cooperation

SEL GRADE LEVEL FOCUSES

PK/K- Listening

Building character through practicing active listening skills, including listening with eyes, ears, brain, and heart

1ST - Friendship

Instruction centered around characteristics of a good friend and strategies for building friendships

2ND - Understanding Conflict Resolution

Building understanding of conflict; utilizing the three steps of the Tree of Choices to regulate emotions and resolve conflict

3RD - Perspective-Taking

Learning to understand, appreciate, and respect points of view that differ from our own

4TH - Practicing Conflict Resolution

Utilizing self-management as a tool for resolving conflict and equipping students to utilize the 3 steps of the Tree of Choices

5TH - Leadership

Building character through leadership, including responsible decision-making and relationship skills



Be Strong
executive functioning

CHARACTER TRAITS

Responsibility, Perseverance, Courage

SEL GRADE LEVEL FOCUSES

PK/K- Following Directions

Explicit teaching of task initiation and working memory; equipping students to follow 3-step directions

1ST - Focusing

Equipping students with self-management skills including attention, time-management, and organization.

2ND - Engagement

Building character through teaching metacognition, attention, participation, and self-control to promote student engagement

3RD - Flexible Thinking

Equipping students to expand their cognitive flexibility, including thinking of multiple solutions to problems

4TH - Organization

Teaching skills to improve organization, such as time-management and breaking projects into smaller pieces.

5TH - Goal-Setting

Explicit teaching and practice of planning and time management, including setting measurable goals and objectives



Be Well
emotion regulation

CHARACTER TRAITS

Gratitude, Honesty, Creativity

SEL GRADE LEVEL FOCUSES

PK/K- Identifying Emotions

Explicit teaching of emotion vocabulary and learning to identify and name emotions

1ST - Emotion Awareness

Building self-awareness through emotion vocabulary; learning to identify the emotions of oneself and others

2ND - Emotion Regulation

Equipping students with emotion regulation strategies in order to improve self-regulation skills

3RD - Emotion Advocacy

Students continue building emotion management skills, while learning to advocate for their needs

4TH - Positive Self-Talk

Equipping students with skills and strategies to transform negative thinking into positive thinking

5TH - Stress Management

Equipping students to practice self-regulation, including tools to manage stress and solve problems

Weekly Lesson Components: START, CONNECT, GROW, RESPOND, EXIT

These five components are the building blocks of PurposeFull People and are designed to be taught each week. Designed for flexibility, lessons can stand alone or be combined in a variety of ways. Educators can present all five lesson components in one 45-60 minute weekly lesson, deliver one component per day (10-20 minutes), or adjust lessons to meet a variety of scheduling needs.

START

Intentional activities and rituals designed to build deep understanding of each character trait through the lens of social and emotional learning. START lessons include character-trait sing-alongs, stories, quotes, and illustrations to spark rich discussion and application.

CONNECT

Fun, engaging activities that build relationships among students, creating positive classroom culture. CONNECT lessons are slide-based and interactive.

GROW

These lessons are the heart of the content, centered around the grade level SEL focus, overarching outcome, and character trait. GROW lessons range from explicit SEL instruction to unique opportunities to put character traits into practice.

RESPOND

This section contains a toolkit of strategies and resources that can be used to help kids respond to a variety of situations. RESPOND includes calming activities for emotion regulation, brain boosters to increase energy and focus, and circle prompts that can be used for reflection and discussion in Morning Meetings, Community Circles, etc.

EXIT

EXIT activities focus on connections and reflections. They create rituals and routines around the end of the day, building a positive classroom culture.

PURPOSEFULL PEOPLE OUTCOME RESPECT		OUTCOME: Be Kind SEL FOCUS: Social Skills
Activity Component	Grade Levels (GROW SECTION: SEL FOCUS)	Overview
START	PK-5	Use of definition, illustrations and activities to foster understanding and application of Respect
CONNECT	PK-5	Activities that build relationships, foster engagement, and promote social skills
GROW	PK/KINDERGARTEN Listening	Explicit teaching and practice of listening skills with a focus on Respect, including active listening with eyes, ears, brain, and heart.
	1ST GRADE Friendship	Explicit teaching and practice of friendship skills with a focus on Respect, including characteristics of a good friend and strategies for building friendships
	2ND GRADE Understanding Conflict Resolution	Explicit teaching and practice of Conflict Resolution skills with a focus on Respect, including utilizing the three steps of the Tree of Choices to regulate emotions and resolve conflict
	3RD GRADE Perspective-Taking	Explicit teaching and practice of perspective-taking with a focus on Respect and seeking to understand other people's point of view
	4TH GRADE Practicing Conflict Resolution	Explicit teaching and practice of Conflict Resolution skills with a focus on Respect, including utilizing the three steps of the Tree of Choices to regulate emotions and resolve conflict
	5TH GRADE Leadership	Explicit teaching and practice of leadership skills with a focus on Respect, including traits of a leader and building interpersonal skills
RESPOND	PK-5	Emotion regulation tools and activities; circle prompts to build community and promote authentic reflection
EXIT	PK-5	Use of reflection and classroom connection activities to end the day, week or month

PURPOSEFULL PEOPLE OUTCOME RESPONSIBILITY		OUTCOME: Be Strong SEL FOCUS: Executive Functioning Skills
Activity Component	Grade Levels (GROW SECTION: SEL FOCUS)	Overview
START	PK-5	Use of definition, illustrations and activities to foster understanding and application of Responsibility
CONNECT	PK-5	Activities that build relationships, foster engagement, and promote social skills
GROW	PK/KINDERGARTEN Following Directions	Explicit teaching and practice of task initiation and working memory with a focus on Responsibility
	1ST GRADE Focusing	Explicit teaching and practice of attention, planning, and time management with a focus on Responsibility
	2ND GRADE Engagement	Explicit teaching and practice of metacognition, attention, and self-control with a focus on Responsibility
	3RD GRADE Flexible Thinking	Explicit teaching and practice of flexibility with a focus on Responsibility, including equipping students to expand their cognitive flexibility by thinking of multiple solutions to problems.
	4TH GRADE Organization	Explicit teaching and practice of organization skills with a focus on Responsibility, including instruction around time-management and breaking projects into smaller pieces.
	5TH GRADE Goal-Setting	Explicit teaching and practice of planning and time management with a focus on Responsibility, including setting measurable goals and objectives.
RESPOND	PK-5	Emotion regulation tools and activities; circle prompts to build community and promote authentic reflection
EXIT	PK-5	Use of reflection and classroom connection activities to end the day, week or month

PURPOSEFULL PEOPLE OUTCOME GRATITUDE		OUTCOME: Be Well SEL FOCUS: Emotional Regulation
Activity Component	Grade Levels (GROW SECTION: SEL FOCUS)	Overview
START	PK-5	Use of definition, illustrations and activities to foster understanding and application of Gratitude
CONNECT	PK-5	Activities that build relationships, foster engagement, and promote social skills
GROW	PK/KINDERGARTEN Identifying Emotions	Explicit teaching of emotion vocabulary and practicing emotion identification with a focus on Gratitude
	1ST GRADE Emotion Awareness	Explicit teaching of emotion vocabulary to build personal awareness with a focus on Gratitude. Building skills around accurately naming emotions.
	2ND GRADE Emotion Regulation	Explicit teaching and practice of emotion regulation skills with a focus on Gratitude; students continue building emotion vocabulary while learning strategies for managing their emotions
	3RD GRADE Emotion Advocacy	Explicit teaching and practice of emotion advocacy with a focus on Gratitude; students continue building emotion vocabulary and management skills, while learning to advocate for their needs
	4TH GRADE Positive Self-Talk	Explicit teaching and practice of positive self-talk with a focus on Gratitude; students learn to refocus negative thinking into positive thinking
	5TH GRADE Stress Management	Explicit teaching and practice of stress management skills with a focus on Gratitude; students continue utilizing strategies for emotion regulation along with practical tools to manage stress and solve problems
RESPOND	PK-5	Emotion regulation tools and activities; circle prompts to build community and promote authentic reflection
EXIT	PK-5	Use of reflection and classroom connection activities to end the day, week or month

PURPOSEFULL PEOPLE OUTCOME EMPATHY		OUTCOME: Be Kind SEL FOCUS: Social Skills
Activity Component	Grade Levels (GROW SECTION: SEL FOCUS)	Overview
START	PK-5	Use of definition, illustrations and activities to foster understanding and application of Empathy
CONNECT	PK-5	Activities that build relationships, foster engagement, and promote social skills
GROW	PK/KINDERGARTEN Listening	Explicit teaching and practice of listening skills with a focus on Empathy, including active listening with eyes, ears, brain, and heart.
	1ST GRADE Friendship	Explicit teaching and practice of friendship skills with a focus on Empathy, including characteristics of a good friend and strategies for building friendship
	2ND GRADE Understanding Conflict Resolution	Explicit teaching and practice of Conflict Resolution skills with a focus on Empathy, including utilizing the three steps of the Tree of Choices to regulate emotions and resolve conflict
	3RD GRADE Perspective-Taking	Explicit teaching and practice of perspective-taking with a focus on Empathy and seeking to understand other people's point of view
	4TH GRADE Practicing Conflict Resolution	Explicit teaching and practice of Conflict Resolution skills with a focus on Empathy, including utilizing the three steps of the Tree of Choices to regulate emotions and resolve conflict
	5TH GRADE Leadership	Explicit teaching and practice of leadership skills with a focus on Empathy, including traits of a leader and building interpersonal skills
RESPOND	PK-5	Emotion regulation tools and activities; circle prompts to build community and promote authentic reflection
EXIT	PK-5	Use of reflection and classroom connection activities to end the day, week or month

PURPOSEFULL PEOPLE OUTCOME PERSEVERANCE		OUTCOME: Be Strong SEL FOCUS: Executive Functioning Skills
Activity Component	Grade Levels (GROW SECTION: SEL FOCUS)	Overview
START	PK-5	Use of definition, illustrations and activities to foster understanding and application of Perseverance
CONNECT	PK-5	Activities that build relationships, foster engagement, and promote social skills
GROW	PK/KINDERGARTEN Following Directions	Explicit teaching and practice of task initiation and working memory with a focus on Perseverance
	1ST GRADE Focusing	Explicit teaching and practice of attention, planning, and time management with a focus on Perseverance
	2ND GRADE Engagement	Explicit teaching and practice of metacognition, attention, and self-control with a focus on Perseverance
	3RD GRADE Flexible Thinking	Explicit teaching and practice of flexibility with a focus on Perseverance, including equipping students to expand their cognitive flexibility by thinking of multiple solutions to problems.
	4TH GRADE Organization	Explicit teaching and practice of organization skills with a focus on Perseverance, including instruction around time-management and breaking projects into smaller pieces.
	5TH GRADE Goal-Setting	Explicit teaching and practice of planning and time management with a focus on Perseverance, including setting measurable goals and objectives.
RESPOND	PK-5	Emotion regulation tools and activities; circle prompts to build community and promote authentic reflection
EXIT	PK-5	Use of reflection and classroom connection activities to end the day, week or month

PURPOSEFULL PEOPLE OUTCOME HONESTY

OUTCOME: Be Well
SEL FOCUS: Emotional Regulation

Activity Component	Grade Levels (GROW SECTION: SEL FOCUS)	Overview
START	PK-5	Use of definition, illustrations and activities to foster understanding and application of Honesty
CONNECT	PK-5	Activities that build relationships, foster engagement, and promote social skills
GROW	PK/KINDERGARTEN Identifying Emotions	Explicit teaching of emotion vocabulary and emotion identification with a focus on Honesty
	1ST GRADE Emotion Awareness	Explicit teaching of emotion vocabulary to build personal awareness with a focus on Honesty. Building skills around accurately naming emotions.
	2ND GRADE Emotion Regulation	Explicit teaching and practice of emotion regulation skills with a focus on Honesty; students continue building emotion vocabulary while learning strategies for managing their emotions
	3RD GRADE Emotion Advocacy	Explicit teaching and practice of emotion advocacy with a focus on Honesty; students continue building emotion vocabulary and management skills, while learning to advocate for their needs
	4TH GRADE Positive Self-Talk	Explicit teaching and practice of positive self-talk with a focus on Honesty; students learn to refocus negative thinking into positive thinking
	5TH GRADE Stress Management	Explicit teaching and practice of stress management skills with a focus on Honesty; students continue utilizing strategies for emotion regulation along with practical tools to manage stress and solve problems
RESPOND	PK-5	Emotion regulation tools and activities; circle prompts to build community and promote authentic reflection
EXIT	PK-5	Use of reflection and classroom connection activities to end the day, week or month

PURPOSEFULL PEOPLE OUTCOME COOPERATION		OUTCOME: Be Kind SEL FOCUS: Social Skills
Activity Component	Grade Levels (GROW SECTION: SEL FOCUS)	Overview
START	PK-5	Use of definition, illustrations and activities to foster understanding and application of Cooperation
CONNECT	PK-5	Activities that build relationships, foster engagement, and promote social skills
GROW	PK/KINDERGARTEN Listening	Explicit teaching and practice of listening skills with a focus on Cooperation, including active listening with eyes, ears, brain, and heart.
	1ST GRADE Friendship	Explicit teaching and practice of friendship skills with a focus on Cooperation, including characteristics of a good friend and strategies for building friendship
	2ND GRADE Understanding Conflict Resolution	Explicit teaching and practice of Conflict Resolution skills with a focus on Cooperation, including utilizing the three steps of the Tree of Choices to regulate emotions and resolve conflict
	3RD GRADE Perspective-Taking	Explicit teaching and practice of perspective-taking with a focus on Cooperation and seeking to understand other people's point of view
	4TH GRADE Practicing Conflict Resolution	Explicit teaching and practice of Conflict Resolution skills with a focus on Cooperation, including utilizing the three steps of the Tree of Choices to regulate emotions and resolve conflict
	5TH GRADE Leadership	Explicit teaching and practice of leadership skills with a focus on Cooperation, including traits of a leader and building interpersonal skills
RESPOND	PK-5	Emotion regulation tools and activities; circle prompts to build community and promote authentic reflection
EXIT	PK-5	Use of reflection and classroom connection activities to end the day, week or month

PURPOSEFULL PEOPLE OUTCOME COURAGE		OUTCOME: Be Strong SEL FOCUS: Executive Functioning Skills
Activity Component	Grade Levels (GROW SECTION: SEL FOCUS)	Overview
START	PK-5	Use of definition, illustrations and activities to foster understanding and application of Courage
CONNECT	PK-5	Activities that build relationships, foster engagement, and promote social skills
GROW	PK/KINDERGARTEN Following Directions	Explicit teaching and practice of task initiation and working memory with a focus on Courage
	1ST GRADE Focusing	Explicit teaching and practice of attention, planning, and time management with a focus on Courage
	2ND GRADE Engagement	Explicit teaching and practice of metacognition, attention, and self-control with a focus on Courage
	3RD GRADE Flexible Thinking	Explicit teaching and practice of flexibility with a focus on Courage, including equipping students to expand their cognitive flexibility by thinking of multiple solutions to problems.
	4TH GRADE Organization	Explicit teaching and practice of organization skills with a focus on Courage, including instruction around time-management and breaking projects into smaller pieces.
	5TH GRADE Goal-Setting	Explicit teaching and practice of planning and time management with a focus on Courage, including setting measurable goals and objectives.
RESPOND	PK-5	Emotion regulation tools and activities; circle prompts to build community and promote authentic reflection
EXIT	PK-5	Use of reflection and classroom connection activities to end the day, week or month

PURPOSEFULL PEOPLE OUTCOME CREATIVITY		OUTCOME: Be Well SEL FOCUS: Emotional Regulation
Activity Component	Grade Levels (GROW SECTION: SEL FOCUS)	Overview
START	PK-5	Use of definition, illustrations and activities to foster understanding and application of Creativity
CONNECT	PK-5	Activities that build relationships, foster engagement, and promote social skills
GROW	PK/KINDERGARTEN Identifying Emotions	Explicit teaching of emotion vocabulary and emotion identification with a focus on Creativity
	1ST GRADE Emotion Awareness	Explicit teaching of emotion vocabulary to build personal awareness with a focus on Creativity. Building skills around accurately naming emotions.
	2ND GRADE Emotion Regulation	Explicit teaching and practice of emotion regulation skills with a focus on Creativity; students continue building emotion vocabulary while learning strategies for managing their emotions
	3RD GRADE Emotion Advocacy	Explicit teaching and practice of emotion advocacy with a focus on Creativity; students continue building emotion vocabulary and management skills, while learning to advocate for their needs
	4TH GRADE Positive Self-Talk	Explicit teaching and practice of positive self-talk with a focus on Creativity; students learn to refocus negative thinking into positive thinking
	5TH GRADE Stress Management	Explicit teaching and practice of stress management skills with a focus on Creativity; students continue utilizing strategies for emotion regulation along with practical tools to manage stress and solve problems
RESPOND	PK-5	Emotion regulation tools and activities; circle prompts to build community and promote authentic reflection
EXIT	PK-5	Use of reflection and classroom connection activities to end the day, week or month



6TH GRADE Scope & Sequence

Belonging: How can we create a place where everyone feels like they belong?

S1: Building Connections

Welcome to Session 1! This is the 1st of 2 sessions about building community. The goal is to begin to develop relationships and start creating a sense of safety and community in our classroom space.

S2: Building Community

This is session 2 of 2 in our community building series. It is focused on continuing to build connections and a positive classroom climate. We'll be doing activities to get to know each other better and learn more about each other's names.

S3: Middle School Mythbusting (Belonging)

This is the 1st of 2 sessions that utilize videos to bring student voices forward with the goal of helping quell worries our students might have at the beginning of middle school. This session is about fitting in and belonging at school.

S4: Middle School Mythbusting (Test Taking)

This is the 2nd of 2 sessions that utilize videos to bring student voices forward with the goal of helping quell worries our students might have at the beginning of middle school. This session is focused on taking tests in middle school.

S5: Developing Community Agreements

This is the 1st of 2 sessions where we work to develop Community Agreements. This process is designed to bring many voices forward to make sure everyone has an opportunity to reflect on and discuss how we want to treat each other. These agreements are designed to help the class to become a safe place where people can be genuine without fear of mistreatment. The agreements are designed to serve as guidelines we can refer to throughout the year.

S6: Upholding Community Agreements

This is session 2 of 2 where we work to develop Community Agreements. This process brings many voices forward to make sure everyone has an opportunity to reflect on and discuss how we want to treat each other. By the end of this session, we will have voted on our Top 3 Community Agreements.

S7: Understanding the CharacterDare Process

This session sets up the first CharacterDare, which will be a consistent part of almost every session for the rest of the year. The CharacterDares are designed to help us practice and generalize the skills learned in the program. We will return to the conversation about character and values in session 10.

S8: Get to Know Your School: Who's Here?

The theme of this year is "Belonging" and this is the 1st of 2 sessions with the goal of helping us make connections and build relationships. In this session's activity, we make plans to get to know 4 adults in the building.

S9: Get to Know Your School: What's Here?

The theme of this year is "Belonging" and this is the 2nd of 2 sessions with the goal of helping us make connections and build relationships. In this session, we identify opportunities to get involved in fun and interesting activities at school and think of opportunities we wish existed.

S10: Exploring Values

This is the 1st of 3 sessions focused on exploring values. Getting clear on our own personal values can help us make decisions and act in ways that align with our sense of self and what we think is important. In this session, we explore the topic of values by reflecting on qualities we value in other people.

S11: Understanding Values

This is the 2nd of 3 sessions focused on exploring values, in this session by considering how different people demonstrate their values and how we show others what we value. The class will choose 1 Community Agreement and explore it from different value perspectives.

S12: Practicing Values

This is the 3rd of 3 sessions focused on exploring values, in this session by reflecting on how we want to feel in different situations and discussing how this relates to and can help us understand our personal values. We will spend time thinking about what we value and how that helps us to think about who we want to be.

S13: Building Listening Skills

This is the 1st of 2 sessions on becoming better listeners. Listening is an important skill that improves peer relationships and is important for perspective-taking, conflict resolution, and group work. In this session, we practice listening closely with a partner and reflect on what was hard (or easy) about it.



6TH GRADE Scope & Sequence

Belonging: How can we create a place where everyone feels like they belong?

S14: Applying Listening Skills: Part 1

This is the 2nd of 2 sessions focused on listening. Listening is a valuable skill that improves peer relationships and is important for perspective-taking, conflict resolution, and group work. In this session, we practice identifying good versus bad listening.

S15: Understanding Others' Perspectives

This is the 1st of 2 sessions on perspective-taking. Perspective-taking is important for peer relationships and supports friendship, respect, and conflict resolution, including across student differences. In this session, we work in groups to practice trying to understand the perspective of other people.

S16: Practicing Perspective-Taking

This is the 2nd of 2 sessions on perspective-taking. Perspective-taking is not just a passive process. In this session, we practice improving our ability to understand someone else through applying our listening skills and asking thoughtful questions

S17: Understanding Emotions

This is the 1st of 2 sessions focused on understanding and learning ways to regulate our emotions. In this session, we talk about the value of regulating and calming our bodies and learn some techniques focused on breathing.

S18: Regulating Emotions: Part 1

This is the 2nd of 2 sessions on emotions. Research shows being able to name our strong emotions helps us stay calm and think through difficult situations.

S19: Using Values in Conflict Resolution

This is the 1st of 2 Conflict Resolution sessions. In this session, we wrestle as a class with several everyday interpersonal conflict scenarios presented in videos as a way to share and gain insights into ways to think about and handle conflicts.

S20: Understanding Conflict Resolution

This is the 2nd of 2 Conflict Resolution sessions. In this session, we continue to wrestle with everyday interpersonal conflict scenarios presented in videos as a way to share and gain insights into ways to think about and handle conflicts.

S21: Developing Friendships

This is the 1st of 2 sessions on friendship. Having a sense of connectedness and belonging at school boosts student well-being and supports school engagement. In this session, we all share ideas with each other about ways to make friends.

S22: Strengthening Friendships

This is the 2nd of 2 sessions on friendship. The goal is to reflect on the qualities we value in friends.

S23: Applying Listening Skills: Part 2

This is the 1st of 2 listening sessions. The goals are to think about what fully listening looks like and come up with strategies to be better listeners.

S24: Listening with Empathy

This is the 2nd of 2 listening sessions. Listening is an important part of perspective-taking. We can become better at listening and perspective-taking by learning to ask questions and work to ensure we are really understanding what others are saying.

S25: Exercising Perspective-Taking

This is the 1st of 2 sessions on perspective-taking. Learning to understand others' perspectives is a fundamental social skill important for making friends, solving conflicts, and working in groups. In this session, we practice thinking about how different people might react differently to the same situation.

S26: Connecting Through Perspective-Taking

This is the 2nd of 2 sessions on perspective-taking. Learning to understand others' perspectives is a fundamental social skill important for making friends, solving conflicts, and working in groups. In this session, we explore and practice "perspective-getting" by actively asking questions of each other to better understand the perspectives behind their thoughts and opinions - rather than simply assuming we know.

S27: Connecting Motivation & Emotions

This is the 1st of 2 emotion-focused sessions that build on earlier emotions sessions in this grade. In this session, we work to understand the different ways people can notice and feel emotions in their bodies. Being able to notice physical sensations related to emotions can help us catch them early and use emotion regulation strategies before emotions get too intense.



6TH GRADE Scope & Sequence

Belonging: How can we create a place where everyone feels like they belong?

S28: Regulating Emotions: Part 2

This is the 2nd of 2 emotion-focused sessions that follow up on earlier emotion sessions in this grade. In this session, we learn and practice a skill for helping us stay calm by focusing on the sensations where our body contacts solid surfaces.

S29: Making New Friends

This is the 1st of 3 sessions on friendships. Having friends is important for well-being and even school success. Having friends helps us feel a sense of belonging in our school. In this session, we do an activity that helps us learn from each other about ways to make friends.

S30: Becoming A Better Friend

This is the 2nd of 3 sessions on friendship. Having friends is important for well-being and even school success. Having friends helps us feel a sense of belonging in our school. In this session, we share our ideas about values and actions that support friendship and questions we can ask others to help build a friendship.

S31: Resolving Conflicts with Friends

This is the 3rd of 3 sessions on friendship. A certain amount of conflict is inevitable in relationships. In this session we work on practicing ways to resolve conflicts with our friends.

S32: Helping Others Resolve Conflict

In this session, we work on learning to apologize, a simple but important skill that can help us handle some of the conflicts we get into with others.

S33: Reflecting On The Year: Part 1

We have covered a lot of ground in these lessons this year. This is the 1st of 3 sessions focused on thinking back and reflecting on things we've learned and ways we've grown. This reflection process is important for us to cement the learning we have done this year.

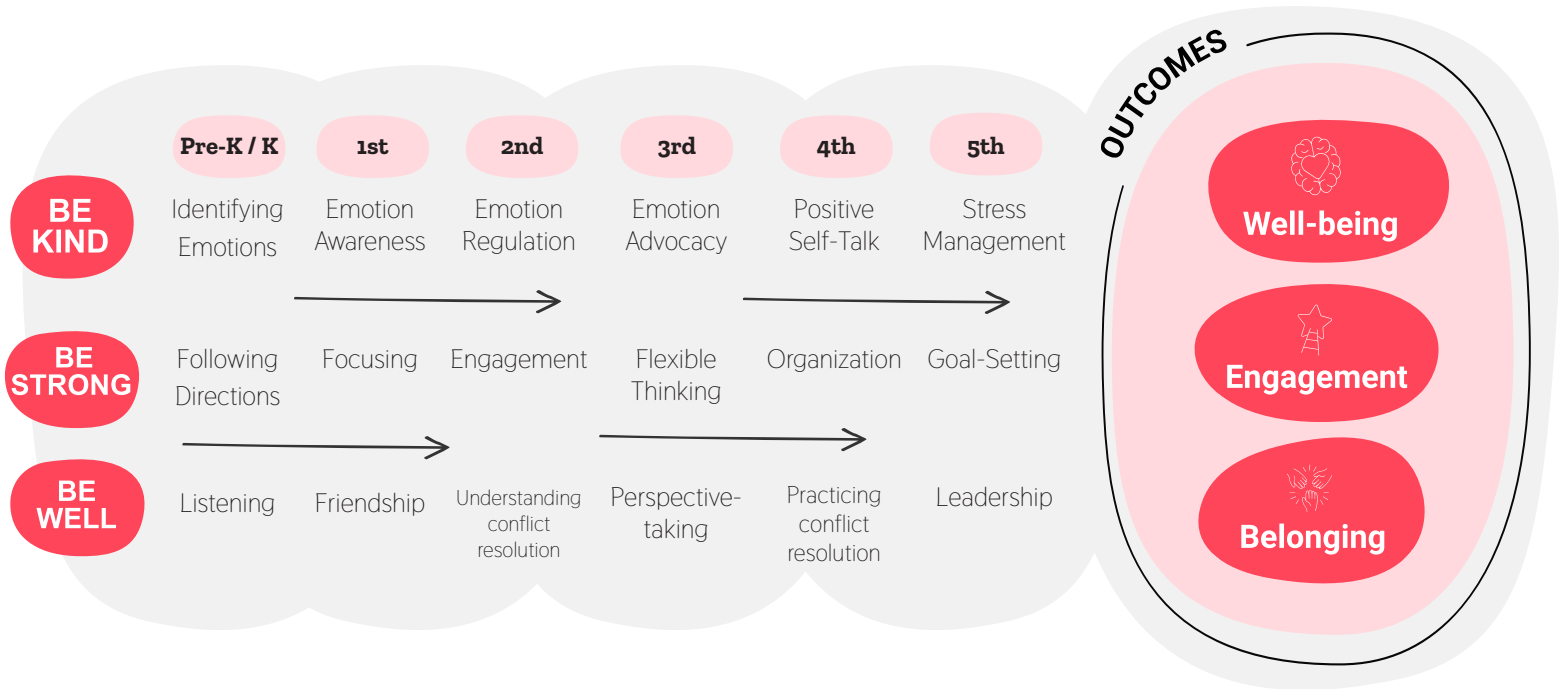
S34: Reflecting On The Year: Part 2

We have covered a lot of ground in these lessons this year. This is the 2nd of 3 sessions focused on thinking back and reflecting on things we've learned and ways we've grown. This reflection process is important for us to cement the learning we have done this year.

S35: Reflecting On The Year: Part 3

We have covered a lot of ground in these lessons this year. This is the 3rd of 3 sessions focused on thinking back and reflecting on things we've learned and ways we've grown. This reflection process is important for us to cement the learning we have done this year.

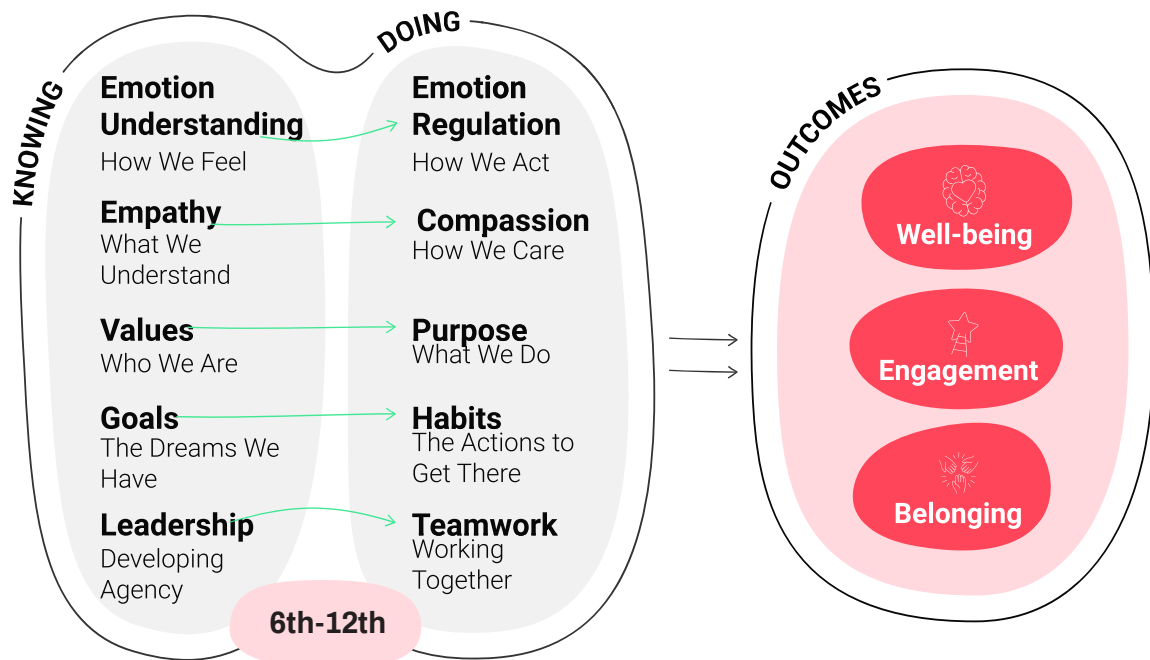
CharacterStrong & PurposeFull People include PreK to 12th grade social & emotional learning and character development curriculum.



Shared outcomes: engagement, belonging, well-being

Shared strategy: relational, engaging, relevant learning

Shared values: school culture starts with the adults, relationships are key, implementation and sustainability matter



Bellevue Union School District

Agenda Item for Board Meeting of April 19, 2022

Agenda Category: Action

Agenda Item Title: Consider Approval of Tentative Agreement Between Bellevue Union School District and Bellevue Education Association for 2021-22 Negotiations

Prepared By: Michael Kellison, Director of Human Resources

Background:

The proposed tentative agreement between Bellevue Union School District and Bellevue Education Association for 2021-22 negotiations is presented for approval. The tentative agreement was developed in a collaborative manner and represents the commitment between BUSD and BEA to work together to ensure that the District and BEA members have a contract that is fair, clear and understandable.

The Articles that were negotiated and amended include Article 7 (with corresponding Appendix A-2), Article 8, and Article 13.

Recommended Action:

Recommend for Approval

Supporting Documents:

Tentative Agreement Between Bellevue Union School District and Bellevue Education Association for 2021-22 Negotiations

Tentative Agreement
February 24, 2022
12:30pm

The parties agree as follows:

1. Article 7

Amend Article 7 and Appendix A-2 as attached.

2. Article 8

- a. The District proposes to increase the compensation for class size overages to \$8 per student per day (including RSP and SDC) effective July 1, 2022. The contract shall be amended to reflect the same.
- b. For the 2021-22 school year only, the District shall increase the compensation for class size overages to \$10 per student per day (including RSP and SDC), effective July 1, 2021.

3. Article 13

Amend Article 13 as attached.

4. This shall conclude negotiations for the 2021-22 school year.

For BEA:



Date: 3/10/22

For the District:



Date: 3/10/22

Tentative Agreement

Article 7 & Appendix A2

[Language to remain the same unless addressed below]

A. WORKDAYS AND HOURS

...

2. HOURS

...

b. Adjunct Duties

i. Participation

1. As part of their professional duties, all unit members will serve on a Column B adjunct duty and a Column C activity. (Appendix A-2) Teachers who are CTIP Mentees are exempt from this requirement.
2. Committees will meet for up to 10 hours per school year, on a pre-scheduled day (i.e. first Wednesday of the month), or at another agreed upon time set not later than one month before the meeting. .

...

ii. Responsibilities

1. Each committee will have an administrator/teacher facilitation team. This team will create an agenda for the next meeting at the end of each meeting.
2. Each committee will have an identified secretary, who will take and publish meeting notes, as well as turn them in to the Superintendent.

iii. Communication

...

2. Each committee will post their meeting notes within one week of the meeting to which they pertain. The secretary will send copies to all Committee members and the Superintendent.

APPENDIX A-2
 ADJUNCT DUTIES

Each unit member shall annually select one (1) Monthly duty and one (1) Occasional duty.

	Column B - Monthly	Column C - Occasional
District Required	Educational Services Committee Student Services Committee DELAC	Steering* GATE DAC
Site Required	SSC (elected by peers) ELAC Site Leadership PBIS	Family/Community Events

* The Steering Committee shall consist of the Superintendent and a member from each committee. The Steering Committee will set committee goals for the District each year, as well as monitor and evaluate the progress of these goals.

For BEA:

Becky Hansen

For the District:

David Alend

Date:

3/10/22

Date:

3/10/22

Tentative Agreement

Article 13

[Language to remain the same unless addressed below]

A. PAID LEAVES

...

3. CATASTROPHIC LEAVE

- a. The Catastrophic Leave Program permits unit members to donate sick leave days to another unit member when that unit member or a member of their immediate family suffers from a verifiable catastrophic illness or injury if prescribed conditions are met.
- b. Every unit member with sufficient accumulated leave shall have the opportunity to participate in the annual open enrollment for the Catastrophic Leave Program. Annual Open Enrollment shall take place yearly from September 1 to October 15.
- c. Newly hired unit members with sufficient accumulated leave shall have the opportunity to enroll within two weeks of their hire date. Newly hired unit members who do not have sufficient accrued sick leave may reduce their accumulated sick leave to not less than nine (9) days during their first two (2) years of employment so that they can join the program. BUSD will include notification of the open enrollment period in the "new hire packet".
- d. Program Members shall initially deposit two (2) leave days, and will be considered to be active and continuing participants in the program. Thereafter, a contribution of one (1) day shall be required of Members whenever, at the end of the school year, the bank contains less than one hundred (100) leave days. A unit member who has less than ten (10) days of sick leave shall be exempt from the required donation.
- e. Definitions:
 - i. Catastrophic illness or injury means an illness or injury that is expected to incapacitate the unit member or will incapacitate an immediate member of the unit member's family for an extended period of time.
 - ii. The catastrophic illness or injury required the unit member to take time off from work for an extended period of time. Taking extended time off from work will create a financial hardship for the unit member because they have exhausted all of their fully-paid accrued sick leave and other paid time off, with the exception of extended (differential) sick leave. Accordingly, leave shall be used in the following order: (a) accrued fully paid sick leave, (b) catastrophic leave, and (c) extended/differential sick leave, if available.

- iii. Catastrophic leave may also be used for extended bereavement time on account of the death of a spouse, child or parent.
- iv. Immediate family is defined in Article 2.E.
- f. Procedure:
 - i. The unit member who is or whose immediate family member is suffering from a catastrophic illness or injury will send their request (CLB Form in Appendix) for catastrophic leave to the BEA President who will convene the CLB Committee, which will be made up of the site representatives serving at each school site.
 - ii. The Committee shall be responsible for administering the CLB in accordance with this Agreement and applicable state laws.
 - iii. The Committee's duties are:
 - Receive leave requests
 - Verify validity of the requests
 - Approve or deny requests
 - Communicate the Committee's decisions to affected unit member(s) and the District office.
 - Solicit donations of sick leave from eligible unit members as needed.
 - iv. The Committee shall designate one of its members as Chairperson. The Chairperson shall serve as the liaison to the District for reporting of donations and withdrawal of days from the CLB. The Committee shall keep all records confidential and shall not disclose the nature of any illness except as is necessary to process the request for leave and appeals of denials. Catastrophic Leave requests shall only be approved by a majority vote of the Committee.
 - v. In order to ensure the viability of the program, if at any time, the total number of days in the bank drops below sixty (60) days, BUSD will notify BEA. BEA will send a request for donations to unit members to rebuild the bank to a minimum level of one hundred (100) days.
- g. Eligibility:
 - i. Unit members who have exhausted all applicable paid leaves provided for in the collective bargaining agreement, except differential pay, may apply for Catastrophic Leave under this Article. Only those who donate may apply to the CLB.
 - ii. The Committee may approve eligibility in renewable increments, not to exceed twenty (20) days; the maximum number of donated days that may

BA
BX

be used by a member will not be more than sixty (60) per year. If donated days of sick leave are available from the CLB, the unit member may use them. If sufficient days are not available, the Committee may solicit donations of days from eligible unit members in accordance with this Agreement on the appropriate form.

- iii. In the event of catastrophic leave is needed for a unit member who does not qualify because they do not have sufficient days to donate to the program, but who otherwise meet the criteria, a special call by BEA for contributions may go out to members to help fulfill the specific need.

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C. UNPAID LEAVE

...

2. LONG-TERM LEAVE

- a. Upon the request of the unit member the District will grant an unpaid leave of absence for periods of up to one (1) year.
- b. A request to extend a year-long unpaid leave must be made by March Board meeting date of the preceding year to which the unit member wishes to extend the unpaid leave. The Board may or may not grant the extension, in its discretion.
- c. On returning from a long-term leave, the unit member will be reinstated to the school and grade from which they left if possible.
- d. This long-term leave may not be used to obtain other employment.
- e. Unit members who have been approved for year-long unpaid leave must inform the District no later than March 1 of their intent to return in the following school year.

For BEA:

For the District:



Date:

3/10/22

Date:

3/10/22

Bellevue Union School District

Agenda Item for Board Meeting of April 19, 2022

Agenda Category: Action

Agenda Item Title: Consider Approval of an Increase to the Monthly Compensation for Board Members

Prepared By: David Alexander, Superintendent

Background:

School board members are locally elected public officials entrusted with governing a community's public schools. The role of the school board is to ensure that school districts are responsive to the values, beliefs and priorities of their communities. - California School Board Association.

The BUSD board currently receives \$50.00 per meeting for compensation. This rate has not changed for approximately 20 years.

BB 9250 Board Bylaws

“Remuneration, Reimbursement And Other Benefits

Each member of the Governing Board may receive the maximum monthly compensation as provided for in Education Code 35120.”

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

EC 35120 Article 2. Officers and Agents

“(5) In any school district in which the average daily attendance for the prior school year was 10,000 or less but more than 1,000, each member of the city board of education or the governing board of the district who actually attends all meetings held may receive as compensation for his or her services a sum not to exceed two hundred forty dollars (\$240) in any month.”

Recommended Action:

Approval of an increase to the monthly compensation for board members

Supporting Documents:

none

Bellevue Union School District

Agenda Item for Board Meeting of April 19, 2022

Agenda Category: Review and Action

Agenda Item Title: Resolution No. 11: Proclaiming May 2-6, 2022 Teacher Appreciation Week And May 3, 2022 National Teacher Day

Prepared By: David Alexander, Ed.D., Superintendent

Background:

May 2-6, 2022 is Teacher Appreciation Week And May 3, 2022 National Teacher Day. We will be joining school districts locally and nationally as we honor and celebrate teachers.

Recommended Action:

It is recommended that the Board of Trustees approve

Supporting Documents:

Resolution No. 11: Proclaiming May 2-6, 2022 Teacher Appreciation Week And May 3, 2022 National Teacher Day

**RESOLUTION OF THE BELLEVUE UNION SCHOOL DISTRICT BOARD OF EDUCATION
PROCLAIMING RESOLUTION NO. 11: PROCLAIMING MAY 2-6, 2021 TEACHER
APPRECIATION WEEK AND MAY 3, 2021 NATIONAL TEACHER DAY**

WHEREAS, an educated citizenry serves as the foundation of our democracy; and,

WHEREAS, teachers fill many roles, as listeners, explorers, role models, motivators and mentors; and

WHEREAS, no other profession touches as many people with such lasting effect; and

WHEREAS, good teaching grows in value and pays dividends far beyond the classroom; and

WHEREAS, teachers continue to influence us long after our school days are only memories;

WHEREAS, excellence in our state begins with California's teachers;

WHEREAS, California's teachers are among the best educated, most credentialed and hardest-working educators in the country; and

NOW, THEREFORE, BE IT RESOLVED that the Bellevue Union School District Board of Education and the Superintendent of Bellevue Union School District urge all citizens to observe May 2-6, 2022 Teacher Appreciation Week And May 3, 2022 National Teacher Day by taking time to remember and honor those Bellevue Union School District Teachers who give the gift of knowledge through teaching.

The foregoing resolution was moved by Board Member _____, seconded by Board Member _____, and adopted on roll call vote on April 19, 2022, by the following vote:

Board Member	Jamie Padilla	_____
Board Member	Stephanie Merrida-Grant	_____
Board Member	Lisa Reyes	_____
Board Member	John Jarvis	_____
Board Member	Adele Walker	_____

AYES: _____ **NOES:** _____ **ABSENT/NOT VOTING:** _____

I hereby certify the foregoing to be a full, true, and correct resolution duly adopted by the Bellevue Union School District Board of Education.

Attest:

President
Bellevue Union Board of Education

Secretary of the Board/Superintendent

Bellevue Union School District

Agenda Item for Board Meeting of April 19, 2022

Agenda Category: Review and Action

Agenda Item Title: Consider Approval of Resolution No. 12: Proclaiming the Week of May May 15–21, 2022 as Classified School Employee Week

Prepared By: David Alexander, Ed.D., Superintendent

Background:

The Week of May 15–21, 2022 is Classified School Employee Week in the State of California. We will be joining other districts in California in honoring our hard working support staff.

Recommended Action:

It is recommended that the Board of Trustees approve

Supporting Documents:

Resolution No. 14: Proclaiming the Week of May 15–21, 2022 as Classified School Employee Week

**RESOLUTION 12 OF THE BELLEVUE UNION SCHOOL DISTRICT
BOARD OF EDUCATION
PROCLAIMING THE WEEK OF MAY 15-21, 2022 AS CLASSIFIED
SCHOOL EMPLOYEE WEEK**

WHEREAS, classified professionals provide valuable services to the schools and students of the Bellevue Union School District; and

WHEREAS, classified professionals contribute to the establishment and promotion of a positive instructional environment; and

WHEREAS, classified professionals serve a vital role in providing for the welfare and safety of Bellevue Union School District's students; and

WHEREAS, classified professionals employed by the Bellevue Union School District strive for excellence in all areas relative to the educational community;

NOW, THEREFORE, BE IT RESOLVED, that the Bellevue Union School District hereby recognizes and wishes to honor the contribution of the classified professionals to quality education in the state of California and in Bellevue Union School District and declares the week of May 15–21, 2022, as Classified School Employee Week in the Bellevue Union School District.

The foregoing resolution was moved by Board Member _____, seconded by Board Member _____, and adopted on roll call vote on April 19, 2022, by the following vote:

Board Member	Jamie Padilla	_____
Board Member	Stephanie Merrida-Grant	_____
Board Member	Lisa Reyes	_____
Board Member	John Jarvis	_____
Board Member	Adele Walker	_____

AYES: _____ **NOES:** _____ **ABSENT/NOT VOTING:** _____

I hereby certify the foregoing to be a full, true, and correct resolution duly adopted by the Bellevue Union School District Board of Education.

Attest:

President
Bellevue Union Board of Education

Secretary of the Board/Superintendent

Bellevue Union School District

Agenda Item for Board Meeting of April 19, 2022

Agenda Category: Action

Agenda Item Title: Consider Approval of Application for Provisional Internship Permit and Intent to Employ Temporary Physical Education Teacher

Prepared By: Michael Kellison, Director of Human Resources

Background:

The proposed application for a Provisional Internship Permit is for the employment of Megan Neely, PE teacher at Bellevue and Meadow View Elementary Schools. Megan is completing her coursework and required tests in order to apply for a preliminary single subject credential in Physical Education. It is the intent of the District to employ Megan as a temporary PE teacher to fill an existing vacancy.

The District was unable to successfully recruit a teacher who possesses a single subject physical education credential despite several efforts. As a result, we recommend supporting the application of:

Megan Neely
Physical Education Teacher (Grades TK-6) ~ Temporary
Bellevue & Meadow View Elementary Schools
Hired on the basis of a Provisional Internship Permit

Recommended Action:

Recommend for Approval

Supporting Documents:

Form CL857

Copy of EdJoin Posting for PE Teacher



State of California
Commission on Teacher Credentialing
Certification Division
1900 Capitol Avenue
Sacramento, CA 95811-4213

Email: credentials@ctc.ca.gov
Website: www.ctc.ca.gov

VERIFICATION OF REQUIREMENTS For the Provisional Internship Permit

This form must be completed by the employing agency and submitted with each application for a Provisional Internship Permit.

Name of Applicant Megan Neely

SSN _____

Name of Employing Agency Bellevue Union School District

County/District/CDS Code 49 70615 0000000

☐ Multiple Subject

☒ Single Subject - Specify subject(s): Physical Education

☐ Education Specialist - Specify specialty area(s): _____

By submitting this form, the employing agency named above verifies that items 1-6 have been completed.

1. A diligent search has been conducted for a suitable credentialed teacher or qualified intern teacher by the following methods and verification of such recruitment efforts is attached:

Required recruitment methods (provide photocopies of **all** of the following 3 methods):

- ☒ Distributed job announcements
- ☒ Contacted college or university placement centers
- ☒ Advertised on the Internet

Optional recruitment methods (in addition to the required methods above):

- ☐ Advertised in professional journals
- ☐ Attended job fairs in California
- ☐ Attended recruitment out-of-state
- ☐ Contacted California teacher recruitment centers
- ☐ Advertised in local/national newspapers
- ☐ Other (explain) _____

2. The permit holder will be provided orientation, guidance and assistance during the valid period of the permit
3. Public notice of intent to employ the applicant in the identified position has been given and meets the following criteria (check the box that applies):

☒ **Public School District**

Public notice was presented as an action item on the governing board agenda and acted upon favorably. A copy of the agenda item is attached.

The agenda item included the applicant's name, assignment, including subject(s) grade level(s), school site, and a statement that the applicant will be employed on the basis of a Provisional Internship Permit.

☐ **County Offices of Education, Nonpublic Schools, Statewide Agencies, and Charter Schools**

Public notice was posted at least 72 hours before the position was filled. A copy of the dated notice is attached.

Public notice included the applicant's name, assignment, including subject(s) grade level(s), school site, and a statement that the applicant will be employed on the basis of a Provisional Internship Permit.

Public notice included a signed statement from the superintendent or administrator confirming there were no objections to the issuance of the permit.

4. The permit holder will be provided assistance in developing a personalized plan through an agency-defined assessment that would lead to meeting subject matter competence related to the permit
5. The permit holder will be provided assistance to seek and enroll in subject matter training, such as workshops or seminars and site-based courses along with training in test-taking strategies and will assist the permit holder in meeting subject matter competence related to the permit
6. The candidate has been apprised of the steps required to earn a credential and enroll in an intern program

- ☐ I understand that I must complete core academic area subject matter to enroll in an intern program for the Education Specialist Instruction Preliminary Credential (academic areas include art, English, foreign language, mathematics, music, science, social science, and multiple subjects)

Applicant Signature _____

Employing Agency Certification

This form must be signed by the District/County Superintendent, Personnel Administrator, NPS/NPA Administrator, or Designee.

I certify under penalty of perjury that the information provided on this form is true and correct.

Signature _____

Title Director of Human Resources

Date _____

2021-2022 Physical Education Teacher (K-6) ~ Temporary at Bellevue Union School District

Job Information

Date Posted: 3/4/2022

Application Deadline: Until Filled

Employment Type: Full Time

Length of Work Year: 185

Salary: \$55,123-\$84,001 (prorated)
DOE + Generous District Contribution
toward health benefits. (2021-2022
salary)

Number Openings: (At time of posting) 1

Contact: Michael Kellison

Email: mkellison@busd.org

Phone: (707) 542-5197 5

Job Summary

The Bellevue Union School District is hiring talented individuals who want to make a difference in the lives of children. True to our mission, we "Inspire Learning" through "Engaging and valuing/caring our students, families and staff."

The PE Teacher vacancy is temporary for the remainder of the 2021-2022 school year. This role will work with students at two campuses, Bellevue Elementary and Meadow View Elementary.

Requirements / Qualifications

All applicants must possess a current California Single Subject Physical Education or Multiple Subject Teaching Credential.

Required Documents Include:

Completed EDJOIN Application

Letter of Introduction

Resume

3 Current Letters of Recommendation

Copy of the Credential

*If offered a contract the applicant must provide official transcripts.

- Credential Copy
- Letter of Introduction
- Letter(s) of Recommendation (We require 3 current letters of recommendation dated within the past year.)
- Resume

Comments and Other Information

Please visit our website for more information about our district and our schools at: www.busd.org
The Bellevue Union School District offers an extremely competitive salary and a generous benefit package to its employees. Go to the Human Resources page on our website to review our salary schedules and employee contracts.

The Governing Board desires to provide a positive work environment where employees and job applicants are assured of equal access and opportunities and are free from harassment in accordance with law. The Board prohibits district employees from discriminating against or harassing any other district employee or job applicant on the basis of the person's actual or perceived race, religious creed, color, national origin, ancestry, age, marital status, pregnancy, physical or mental disability, medical condition, genetic information, veteran status, gender, gender identity, gender expression, sex, or sexual orientation.

Bellevue Union School District

Agenda Item for Board Meeting of April 19, 2022

Agenda Category: Action

Agenda Item Title: Consider Approval of Job Description for Federal Program Coordinator

Prepared By: Michael Kellison, Director of Human Resources &
Aracely Romo-Flores, Director of Curriculum/English Learner Services

Background:

The proposed job description for the Federal Program Coordinator was developed to recruit qualified candidates to provide leadership, direction and staff assistance toward the planning, development, coordination, evaluation, and research of all Federal programs, projects and grants. This position will begin in the 2022-2023 school year and will be responsible for administering and coordinating all activities as they pertain to the Every Student Succeeds Act (ESSA) within the District. In addition, this position will work under the direction of the Director of Curriculum/English Learner Services to support initiatives and programs district-wide.

This is a Certificated Management position and will be placed on the Certificated Management (Administration) Salary Schedule with a 210 day work calendar.

This position will be based upon available funding.

Recommended Action:

Recommend for Approval

Supporting Documents:

Federal Program Coordinator Job Description

Bellevue Union School District

FEDERAL PROGRAM COORDINATOR

(Based upon funding)

JOB DESCRIPTION

GENERAL DESCRIPTION:

Under general supervision of the Director of Curriculum/English Learner Services, the Federal Program Coordinator provides leadership, direction and staff assistance toward the planning, development, coordination, evaluation, and research of all Federal programs, projects and grants. The Coordinator is responsible for administering and coordinating all activities as they pertain to the Every Student Succeeds Act (ESSA) within the District. In addition, the supervision of other categorical programs may be included in the duties of the Federal Program Coordinator as assigned.

DUTIES AND RESPONSIBILITIES

The Federal Program Coordinator is expected to perform all or any combination of the following duties:

- Supports all aspects of categorical programs, including student identification and classification; data-gathering and program evaluation District-wide; presents information to the Board of Trustees on issues related to categorical programs;
- Supports categorical programs in the Consolidated Application, by administering, coordinating, and monitoring the development of fiscal and program documents for all Consolidated Application Programs;
- Attends Categorical Director's meeting with California Department of Education (CDE) and all other federal and state program training and workshops as needed or recommended by the Director of Curriculum/English Learner Services;
- Supports grant programs in the District, including hiring of personnel, in conjunction with Human Resources, management of budget, evaluation of program goals, and coordinating tasks among principals and other staff;
- Works with the Director of Curriculum/English Learner Services, other Directors, departments, and site principals to coordinate the implementation of ESSA, including the implementation of the School Plan for Student Achievement;
- Supports the planning, implementation, and evaluation of all categorical programs so that they promote District objectives, student achievement, and adhere to all State, Federal and District requirements;
- Coordinates District and school level procedures for preparation of categorical programs;
- Acts as a liaison among site administrators and other appropriate personnel in the coordination of all state and federal resources to ensure student academic needs are met;
- Supports principals to assure that all schools meet necessary timelines for submission of plans (with associated budgets) and other program information according to District, State, and Federal requirements;
- Works in collaboration with other staff members as required; and
- Performs other related duties as assigned.

Bellevue Union School District

REQUIREMENTS:

Abilities/Skills/Knowledge

Shall have knowledge of principles of public school administration; of innovative practices in the program improvement; of legal and program requirements related to services for State and Federal programs; of instructional programs associated with compensatory Education School Improvements and other categorical programs, of State and Federal guidelines and the requirements for NCLB. Shall make informed decisions based on collaborative planning; lead District staff and community members in a harmonious manner; conduct and preside at meetings, seminars, and workshops, and to organize and prepare accurate, informative reports; assess District and school climate and culture as they effect the learning environment; work successfully with administrators, teachers, students, and parents; provide coherent demonstration lessons that reflect best practices in curriculum, instruction and include pre and post opportunities for discussion and assist staff in providing this same level of instruction; speak and write clearly and effectively.

EDUCATION AND EXPERIENCE:

Appropriate Administrative Services Credential is required; progressively responsible experience in educational administration as well as demonstrable experience in the area of State and Federal programs is a desired; postgraduate work in school administration, curriculum or a related field or a comparable combination of training and experience is desirable. Bilingual in Spanish preferred.

Licenses and Certificates: TB Test clearance, Criminal Justice Fingerprint clearance, and valid Driver's license and evidence of insurability.

RESPONSIBLE TO:

- Director of Curriculum/English Learner Services

PHYSICAL ABILITIES AND WORKING CONDITIONS OF EMPLOYMENT

The Physical Abilities and Other Conditions of Employment and the Associated Tasks listed are representative of, but are not intended, to provide an exhaustive list of Physical Abilities and Other Conditions of Employments and Associated Tasks which may be required of this position.

Bellevue Union School District

The Bellevue Union School District encourages persons with disabilities who are interested in this employment and need reasonable accommodations of those disabilities to contact the Superintendent for further information.

Physical Demands	Associated Tasks
Vision (which may be corrected): - Read small print - See small objects at a distance of 2 feet	To perform tasks as to: - Create and maintain files - Read a computer screen
Hearing (which may be corrected): - Understand speech over a telephone - Have tolerance to be exposed to noisy conditions	To perform tasks as to: - Answer telephones - Work in a school/classroom setting
Speech: Speak with a level of proficiency and volume to be understood over a telephone and in face-to-face contacts	To perform tasks as to: - Answer questions and transmit information to students, staff, parents, and others - Work instructionally with students
Upper Body Mobility: - Use hands and fingers to feel, grasp, and manipulate small objects. - Manipulate fingers, twist and bend hands at wrist and elbow	To perform tasks as to: - Use a computer to word process and enter data - To hand out and receive forms
Strength: Lift, push, and/or carry objects which weigh as much as 40 pounds on a frequent basis	To perform tasks as to: File and retrieve student records
Environmental Requirements: - Occasional work interruptions - Work cooperatively with others - Work inside	To perform tasks as to: - Gain cooperation of staff - Perform clerical support work in a school
Mental Requirements: - Perform scheduled work - Direct students - Math skills at basic level - Accurately transcribe information	To perform tasks as to: - Read, write, understand, and apply routine information - Read reference materials and instructions, compose reports - Maintain records - Transfer information to forms - Process information quickly and make quick and effective decisions - Decision-making - Listen and retain information accurately - Write and compose information in an organized manner

Bellevue Union School District

Agenda Item for Board Meeting of April 19, 2022

Agenda Category: Review and Action

Agenda Item Title: Approval of Board Monthly Meeting Dates

Prepared By: David Alexander, Ed.D, Superintendent

Background:

It is proposed that regular board meetings continue to be scheduled for one Tuesday each month, generally the third Tuesday of the month. All dates were scheduled to meet the required fiscal reporting dates, as well as the holidays and school breaks.

Recommended Action:

It is recommended that the Board of Trustees approve the Board Monthly Meeting Dates

Supporting Documents:

Board Monthly Meeting Dates



Bellevue Union School District

2022-23 Regular Board Meeting Dates

July 19, 2022 – 3rd Tuesday

August 16, 2022 – 3rd Tuesday

September 13, 2022 – 2nd Tuesday

October 18, 2022 – 3rd Tuesday

November 15, 2022 – 3rd Tuesday

December 13, 2022 – 3rd Tuesday

January 17, 2023 – 3rd Tuesday

February 21, 2023 – 3rd Tuesday

March 7, 2023 – 1st Tuesday

April 18, 2023 – 3rd Tuesday

May 16, 2023 – 3rd Tuesday

June 27, 2023 – 4th Tuesday

Bellevue Union School District

Agenda Item for Board Meeting of April 19, 2022

Agenda Category: Action

Agenda Item Title: Consider Approval of the Employment Contract for the New District Superintendent

Prepared By: Chris Kim, Ed.D., CBO

Background:

Following the recruitment process to fill the vacancy for BUSD Superintendent beginning July 1, 2022, a new Superintendent has been chosen to lead BUSD. The new BUSD Superintendent's employment contract must be reviewed and approved by the Board of Trustees.

Recommended Action:

It is recommended that the Board of Trustees approve the Employment Contract for the New District Superintendent

Supporting Documents:

To be Presented under Separate Cover.

Available for Review at the District Office (3150 Education Drive, Santa Rosa, CA 95407 between the hours of 8am - 4pm.

Bellevue Union School District

Agenda Item for Board Meeting

Agenda Category: Review and Action

Agenda Item Title: Williams Quarterly Uniform Complaint Report Summary (January 1 – March 31)

Prepared By: Moriah Hart, Executive Assistant

Background:

This quarterly report is required by Education Code 35186(d): A school district shall report summarized data on the nature and resolution of all complaints on a quarterly basis to the county superintendent of schools and the governing board of the school district. The summaries shall be publicly reported on a quarterly basis at a regularly scheduled meeting of the governing board of the school district. The report shall include the number of complaints by general subject area with the number of resolved and unresolved complaints. The complaints and written responses shall be available as public records.

Recommended Action:

It is recommended that the Board of Trustees approve the Williams Quarterly Uniform Complaint Report Summary (January 1 – March 31)

Supporting Documents:

Williams Quarterly Uniform Complaint Report Summary (January 1 – March 31)

BELLEVUE Union School District

Williams Settlement Quarterly Uniform Complaint Report Summary

Education Code §35186(d): A school district shall report summarized data on the nature and resolution of all complaints on a quarterly basis to the county superintendent of schools and the governing board of the school district. The summaries shall be publicly reported on a quarterly basis at a regularly scheduled meeting of the governing board of the school district. The report shall include the number of complaints by general subject area with the number of resolved and unresolved complaints. The complaints and written responses shall be available as public records.

Reporting Period:

X January 1 – March 31, 2022 ☐ April 1 – June 30, 2022
☐ July 1 – September 30, 2021 ☐ October 1 – December 31, 2021

No complaints were received during the above time period. ☒

If you received any complaints during the above time period, please complete the following table. Enter "0" in any cell that does not apply.

	Complaints Received	Complaints Resolved	Unresolved Complaints
Instructional Materials	0	0	0
Facilities	0	0	0
Teacher Vacancy and/or Mis-assignment	0	0	0
CAHSEE Intensive Instruction and Services	0	0	0
Total	0	0	0

Board meeting date: 04.19.2022
Date sent to County Superintendent of Schools: 04.20.2022
Sonoma County Office of Education
5340 Skyline Blvd.

Bellevue Union School District

Agenda Item for Board Meeting

Agenda Category: Review and Action

Agenda Item Title: Ratification of Bills and Warrants

Background:

Warrants issued since the last regularly scheduled Board meeting are submitted for ratification.

Recommended Action:

It is recommended the Board ratify these warrants.

Supporting Documents:

Payroll Totals

Board Report of Checks

Bellevue Union School District
2021-2022
March Payroll Totals

Manual Payroll 3/17/2022

Certificated	-
Classified	74.24
Total	<u>74.24</u>

Regular Payroll 3/31/2022

Certificated	727,721.36
Classified	312,154.79
Total	<u>1,039,876.15</u>

Supplemental Payroll 4/8/2022

Certificated	52,047.50
Classified	12,377.35
Total	<u>64,424.85</u>

Total:	<u>1,104,375.24</u>
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Checks Dated 03/03/2022 through 04/12/2022

Check Number	Check Date	Pay to the Order of	Fund-Object	Comment	Expensed Amount	Check Amount
1884189	03/04/2022	McMurtrie, Julie M	01-5800	Teacher Stipend		155.67
1884190	03/04/2022	Lewis, Gina S	01-5800	Teacher Stipend		300.00
1884191	03/04/2022	Alsco (American Linen)	13-5800	Open PO- BV	138.21	
				Open PO- KS	64.32	
				Open PO- MV	130.57	333.10
1884192	03/04/2022	SYNCB/Amazon	01-4310	OPEN PO FOR ELC		96.03
1884193	03/04/2022	Buchanan Food Service	13-4710	OPEN PO :-B.V. Food for Food Svc	707.24	
				OPEN PO: TM Food for Food Svc	722.27	
				OPEN PO: MV Food for Food Svc	951.17	2,380.68
1884194	03/04/2022	California State University, C hico	01-5200	General/Government Registration		300.00
1884195	03/04/2022	Clover Stornetta Farms Inc	13-4715	BV- Student Milk	279.50	
				KW- Student Milk	206.50	
				MV- Student Milk	174.00	
				TM- Student Milk	234.00	894.00
1884196	03/04/2022	Coastline Distributors, Inc	13-4710	OPEN PO- TM - Fruit & Vegetable		514.80
1884197	03/04/2022	FedEx	01-5800	DO: Fedex Shipments		31.48
1884198	03/04/2022	Fishman Supply Co	01-4370	M&O: Custodial Supplies @ TM		45.57
1884199	03/04/2022	Helmer & Sons, Inc	21-6200	Bellevue ES HVAC Improvement Project		68,060.75
1884200	03/04/2022	I.T.S.	01-5100	Counseling Services R.L		717.67
1884201	03/04/2022	Oriental Trading Company Inc.	01-4310	Students Supplies		268.22
1884202	03/04/2022	PG&E	01-5520	Open PO -PG & E		240.85
1884203	03/04/2022	Pylon Communications LLC	01-5911	IT: Telephone Service 2021/22		2,746.03
1884204	03/04/2022	Quality Manufacturing & Dist	01-4362	Gopher Elimination Eq- Additional Oil		602.74
1885425	03/11/2022	Hansen, Rebekah K	01-5800	Apple TV	161.67	
				Teacher's Stipend Reimbursement	300.00	461.67
1885426	03/11/2022	Valley Comfort Heating & Air	01-5800	Open PO : 2021/2022		185.00
1885427	03/11/2022	Becoming Independent	01-5800	BUSD Shredding Services		35.00
1885428	03/11/2022	Bodil Wibe	01-5800	DO; Special Ed Phsyical Therapy Services 2021/2022		90.00
1885429	03/11/2022	Rodney Justin Cook Cook Fire Protection	13-5800	MV--Kitchen Hood Fire Suppression System		300.00
1885430	03/11/2022	Curriculum Associates LLC	01-5800	ELL Students		13,245.00
1885431	03/11/2022	DK Landscaping	01-5800	M&O: OPEN PO for Landscape service		1,566.69
1885432	03/11/2022	Environment Control	01-5800	Cleaning Services		4,626.70
1885433	03/11/2022	Fast Sign	01-4390	Banner for Kindergarten Registration		161.51
1885434	03/11/2022	Fishman Supply Co	01-4370	M&O; Custodial Supplies @ DO	100.42	
				M&O; Custodial Supplies @ MV	291.83	392.25
1885435	03/11/2022	Friedman's Home Improvement	01-4380	Open PO General Dist Maint	6.67	

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Checks Dated 03/03/2022 through 04/12/2022

Check Number	Check Date	Pay to the Order of	Fund-Object	Comment	Expensed Amount	Check Amount
1885435	03/11/2022	Friedman's Home Improvement	01-4390 Open PO	General Dist Maint	2.22	8.89
1885436	03/11/2022	The Home Depot Pro	01-4380 Home Depot			145.06
1885437	03/11/2022	John Deere Financial	01-4380 Open PO-	Maint and Grounds	669.43	
			01-4390 Open PO-	Maint and Grounds	740.74	
			01-5800 Open PO-	Maint and Grounds	1,839.46	3,249.63
1885438	03/11/2022	Office Depot Inc	01-4310 Student Supplies			106.55
1885439	03/11/2022	Marylou Herrera DBA Red Light Learning	01-5803 Translation Service			99.15
1885440	03/11/2022	Roto-Rooter Plumbers	01-5800 Open PO-Roto Rooter Plumbers			2,028.26
				2021/2022		
1886011	03/16/2022	Rocio Isela Galindo Orega	01-5862 LIVE SCAN-	Fingerprints		25.00
1886012	03/16/2022	Arlich, Megan	01-5862 LIVE SCAN			74.00
1886013	03/16/2022	SYNCB/Amazon	01-5840 ITECH:	Supplies		145.02
1886014	03/16/2022	Ameriflex	01-5800 DO: FSA Admin Fee 6 Employees		52.37	
			01-5858 DO: FSA Admin Fee 6 Employees		7.63	60.00
1886015	03/16/2022	Valley Comfort Heating & Air	01-5800 Open PO :	2021/2022		59.51
1886016	03/16/2022	AT & T	01-5911 Open PO CALNET3			129.86
1886017	03/16/2022	Department Of Justice Accounting Office Cashier Unit	01-5862 Open PO for DO-	Fingerprinting		192.00
1886018	03/16/2022	ESP & Alarm Inc.	01-5805 Open PO BV Monthly Patrols		750.00	
			Open PO KS/ELC Monthly Patrols		1,500.00	
			Open PO MV Monthly Patrols		750.00	
			Open PO TM Monthly Patrols		750.00	3,750.00
1886019	03/16/2022	TIAA Bank	01-5600 Copier Lease Contract # 2023517		312.46	
			Lease Agreement for Copiers Acc# 20399421-1		1,169.50	1,481.96
1886020	03/16/2022	Fast Sign	01-4390 Banner for Kindergarten Registration			161.51
1886021	03/16/2022	Fishman Supply Co	01-4370 M&O; Custodial Supplies @ KW			185.87
1886022	03/16/2022	Fun and Function	01-4310 Special Education Supplies			218.15
1886023	03/16/2022	Greenacre Homes	01-5800 NPS: AJL			4,893.27
1886024	03/16/2022	Janet Gossett	01-4350 DO: OPEN PO:Signature Stamps/ Ink			48.68
1886025	03/16/2022	Kaseya US LLC	01-5845 Google back up			2,966.40
1886026	03/16/2022	Paradigm Healthcare Services	01-5800 Contracted service for Medical Billing			318.49
				2021/2022		
1886027	03/16/2022	Presence Learning Inc	01-5800 SLP Services 2021/2022			17,421.48
1886028	03/16/2022	Lockbox Bartley Pump PMLLC	01-5800 Open PO -Bartley Pump			780.00
1886029	03/16/2022	Recology Sonoma Marin	01-5560 BV- Garage & Recycling Pick up		705.71	
			KW/ELC- Garage & Recycling		705.71	
			MV: Garage & Recycling Pick up		765.44	

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Checks Dated 03/03/2022 through 04/12/2022

Check Number	Check Date	Pay to the Order of	Fund-Object	Comment	Expensed Amount	Check Amount
1886029	03/16/2022	Recology Sonoma Marin		TM- Garage & Recycling	765.44	2,942.30
1886030	03/16/2022	Redwood Pediatric Therapy Asso	01-5800	Occupational Tehrapy Services		12,337.07
1886031	03/16/2022	Soliant	01-5100	Speech Therapist & Speech Language Assistants		21,946.89
1886032	03/16/2022	US Bank Equipment Finance	01-5858	OpenPO - Lease Bellevue School		548.39
1886033	03/16/2022	Dale M Crane dbaAction Plumbing Maintenance	01-5800	OPEN PO Plumbing Repairs		1,795.00
1886034	03/16/2022	Advanced Security Systems-SR	25-5800	Service Call Repair & Replacement		278.67
1886035	03/16/2022	Alsco (American Linen)	13-5800	Open PO- BV	138.21	
				Open PO- MV	130.57	268.78
1886036	03/16/2022	Buchanan Food Service	13-4710	OPEN PO :-B.V. Food for Food Svc	2,155.43	
				OPEN PO: TM Food for Food Svc	475.18	
				OPEN PO: MV Food for Food Svc	505.36	3,135.97
1886037	03/16/2022	Clover Stornetta Farms Inc	13-4715	BV- Student Milk	1,923.30	
				KW- Student Milk	1,506.00	
				MV- Student Milk	1,397.50	
				TM- Student Milk	1,515.00	6,341.80
1886038	03/16/2022	Coastline Distributors, Inc	13-4710	OPEN PO- BV - Fruit & Vegetable	888.40	
				OPEN PO- MV - Fruit & Vegetable	1,026.00	
				OPEN PO- TM - Fruit & Vegetable	14.75	1,929.15
1886039	03/16/2022	David Kerr	01-5800	Vocal Music		1,075.00
1886040	03/16/2022	Environmental Pump Services, Inc.	13-5800	Open PO-Grease Trap Service		125.00
1886041	03/16/2022	Fishman Supply Co	01-4370	M&O: Custodial Supplies@BV	136.45	
				M&O: Custodial Supplies @ TM	1,159.70	1,296.15
1886042	03/16/2022	Food Equipment Repair Service	13-5800	Open PO-Food Equipment Repair		360.55
1886043	03/16/2022	Acco Brands USA LLC	01-4342	Laminator Ultima 65 Machine		2,371.86
1886044	03/16/2022	Gold Star Foods, Inc.	13-4710	OPEN PO BV Food Supply	4,340.37	
				OPEN PO MV Food Supply	473.39	
				OPEN PO TM Food Supply	1,064.36	5,878.12
1886045	03/16/2022	Pro Care Therapy	01-5100	SLP's: Speech Language Pathlogist		6,606.00
1886046	03/16/2022	SLP Toolkit	01-4310	Annual Subscription 2021/2022		860.00
1886047	03/16/2022	Verizon	01-5800	Lines		266.07
1886048	03/16/2022	Westminster Woods Camp and Conference Center	01-5833	Outdoor Ed - TM		1,000.00
1886674	03/18/2022	Newport Trust Company	01-9540	Vanguard		16,200.00
1886675	03/18/2022	Ofolia Torres Loara	01-5862	Live Scan		25.00
1886676	03/18/2022	Hayes, Rhiannon	01-5862	Live Scan		25.00
1886677	03/18/2022	SYNCB/Amazon	01-4310	Student Supplies		165.63

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Checks Dated 03/03/2022 through 04/12/2022

Check Number	Check Date	Pay to the Order of	Fund-Object	Comment	Expensed Amount	Check Amount
1886678	03/18/2022	Banerjea, Pia	01-5800	Psychoeducational Assessments		1,900.00
1886679	03/18/2022	Valley Comfort Heating & Air	01-5800	Open PO : 2021/2022		395.00
1886680	03/18/2022	AT & T	01-5911	Open PO CALNET3		45.39
1886681	03/18/2022	Citi Cards	01-5800	District Credit Card		1,522.04
1886682	03/18/2022	Center for the Collaborative Classroom	01-4310	SIPPS Complete Fluency Practice Library Grades 1-3		24,773.44
1886683	03/18/2022	Discount Blinds & Shutters	21-6200	Replace & Install Blinds		2,500.00
1886684	03/18/2022	Discovery Office Systems	01-4310	DO: Service Contract all sites 2021/2022		198.15
1886685	03/18/2022	Friedman's Home Improvement	01-4380	TM: OPEN PO for Supplies		35.71
1886686	03/18/2022	Language People	01-5803	ELC- OPEN PO Interpreting services		1,395.25
1886687	03/18/2022	North Bay Children's Center	12-5800	ARPA Act Funding		33,000.00
1886688	03/18/2022	Robert G Smith RGS Consulting LLC	21-6200	Roof Repair on Portables		3,500.00
1886689	03/18/2022	Soliant	01-5100	Speech Therapist & Speech Language Assistants		14,230.05
1886690	03/18/2022	US Bank Equipment Finance	01-5858	OpenPO - Lease Bellevue School		111.20
1886691	03/18/2022	Alsco (American Linen)	13-5800	Open PO- MV	130.57	
				Open PO- TM	113.42	243.99
1886692	03/18/2022	Aunt Flow	01-5800	Hygiene Product & Dispensers: Feminine		15,020.00
1886693	03/18/2022	Buchanan Food Service	13-4710	OPEN PO :-B.V. Food for Food Svc	1,140.18	
				OPEN PO: TM Food for Food Svc	836.34	
				OPEN PO: MV Food for Food Svc	885.11	2,861.63
1886694	03/18/2022	Clover Stornetta Farms Inc	13-4715	BV- Student Milk	324.50	
				MV- Student Milk	449.50	
				TM- Student Milk	258.00	1,032.00
1886695	03/18/2022	Coastline Distributors, Inc	13-4710	OPEN PO- BV - Fruit & Vegetable	307.20	
				OPEN PO- MV - Fruit & Vegetable	663.65	
				OPEN PO- TM - Fruit & Vegetable	530.30	1,501.15
1886696	03/18/2022	Friedman's Home Improvement	01-4380	TM: OPEN PO for Supplies		35.71
1886697	03/18/2022	Gold Star Foods, Inc.	13-4710	OPEN PO MV Food Supply	1,103.70	
				OPEN PO TM Food Supply	1,641.88	2,745.58
1886698	03/18/2022	Great America Financial Svcs	01-5858	OPEN PO-Postbase 45 mail machine	2.99	
			01-5950	OPEN PO-Postbase 45 mail machine	161.99	164.98
1886699	03/18/2022	Santa Rosa City Schools	13-5100	Open PO-Meals for Kawana		31,965.00
1887818	03/25/2022	Lynn M Wong	01-5862	live scan		74.00
1887819	03/25/2022	SYNCB/Amazon	01-4350	DO : Office Supplies Purchases		33.51
1887820	03/25/2022	AT&T Mobility	01-5911	Open PO for Emergency Phone # 8341		466.90
1887821	03/25/2022	BAM Plumbing	01-5800	DO- Plumbing Services		4,037.50
1887822	03/25/2022	California's Valued Trust	01-9570	Coverage for April 2022	144,903.45	

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Checks Dated 03/03/2022 through 04/12/2022

Check Number	Check Date	Pay to the Order of	Fund-Object	Comment	Expensed Amount	Check Amount
1887822	03/25/2022	California's Valued Trust		Coverage for March 2022	155,657.00	300,560.45
1887823	03/25/2022	AT & T	01-5911	Open PO CALNET3		240.55
1887824	03/25/2022	Culligan of Sonoma County	01-5800	OPEN PO :Drinking Water 5 Gallon		55.45
1887825	03/25/2022	Environment Control	01-5800	Cleaning Services		520.00
1887826	03/25/2022	TIAA Bank	01-5600	DO:Agreement For SF-5130 Account # 20415329-1	303.58	
				Lease Agreement for Copiers Acc# 20399421-1	1,273.10	1,576.68
1887827	03/25/2022	Fishman Supply Co	01-4370	M&O; Custodial Supplies @ KW	934.90	
				M&O; Custodial Supplies @ MV	223.63	1,158.53
1887828	03/25/2022	Fun and Function	01-4310	SDC Materials		158.28
1887829	03/25/2022	PG&E	01-5520	Open PO -PG & E		213.44
1887830	03/25/2022	RGM Kramer Inc	21-6200	BUSD Portables MObernization Cousulting	5,375.00	
			25-5800	DO : General Management Services	712.50	6,087.50
1887831	03/25/2022	RGM And Associates	21-6200	RGMK CM Services Agreement KS Modernization		8,000.00
1887832	03/25/2022	Roto-Rooter Plumbers	01-5800	Open PO-Roto Rooter Plumbers 2021/2022		1,417.59
1887833	03/25/2022	Santa Rosa, City Of	01-5560	Open PO for Water bill BV	822.88	
				Open PO for Water bill MV & Spa	1,066.00	1,888.88
1887834	03/25/2022	School & College Legal Service Sonoma County Office of Ed.	01-5823	OPEN PO - Legal Services 2021/2022		4,312.00
1887835	03/25/2022	Wilson Architecture Inc	21-6200	BUSD Portable Building Refurbishing	17,927.50	
			25-6200	Bus Barn Repairs	5.00	17,932.50
1888235	04/01/2022	Aaction Rents	01-5600	Open PO: Rentals		861.52
1888236	04/01/2022	Advanced Security Systems-SR	25-5800	Service Call Repair & Replacement		1,894.88
1888237	04/01/2022	Greenback Gambit Inc	01-4350	Office Chair	4.16	
			01-4390	Office Chair	856.17	
			01-9510	Office Chair	589.72	
			25-5800	ELC Office Conference Ergonomic Furniture	3,204.96	
					3,272.95	7,927.96
1888238	04/01/2022	Alsco (American Linen)	13-5800	Open PO- KS	64.32	
				Open PO- MV	130.57	194.89
1888239	04/01/2022	SYNCB/Amazon	01-5840	ITECH: Supplies		109.01
1888240	04/01/2022	Anova Education & Behavior	01-5800	NPS B.T		4,585.68
1888241	04/01/2022	Matthew Banchemo	01-5800	OPEN PO: Tree Service for all Sites		910.00
1888242	04/01/2022	Valley Comfort Heating & Air	21-6200	KS HVAC Repairs Room # 5,8,13,18,19,22 & 24		27,137.00

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Checks Dated 03/03/2022 through 04/12/2022

Check Number	Check Date	Pay to the Order of	Fund-Object	Comment	Expensed Amount	Check Amount
1888243	04/01/2022	Buchanan Food Service	13-4710	OPEN PO: TM Food for Food Svc	382.58	
				OPEN PO: MV Food for Food Svc	961.50	1,344.08
1888244	04/01/2022	Christy White Associates	01-5821	Measure D, C, J bond audit		8,000.00
1888245	04/01/2022	City Of Santa Rosa Alarm Progr am	01-5805	M&O Burglary Alarm Fee		300.00
1888246	04/01/2022	Clover Stornetta Farms Inc	13-4715	KW- Student Milk	486.00	
				MV- Student Milk	192.00	
				TM- Student Milk	456.50-	221.50
1888247	04/01/2022	Coastline Distributors, Inc	13-4710	OPEN PO- MV - Fruit & Vegetable	252.10	
				OPEN PO- TM - Fruit & Vegetable	336.00	588.10
1888248	04/01/2022	Discovery Office Systems	01-4310	DO: Service Contract all sites 2021/2022		5,176.47
1888249	04/01/2022	DMR Builders Corp	21-6200	Bellevue E.S Restroom Water Damage	11,340.00	
				Open PO for DMR Builders	1,380.00	12,720.00
1888250	04/01/2022	Fishman Supply Co	01-4370	M&O: Custodial Supplies @ TM	299.73	
				M&O: Custodial Supplies @ KW	301.80	601.53
1888251	04/01/2022	Food Equipment Repair Service	13-5800	Open PO-Food Equipment Repair		586.08
1888252	04/01/2022	Friedman's Home Improvement	01-4380	Open PO General Dist Maint	30.40	
			01-4390	Open PO General Dist Maint	10.14	40.54
1888253	04/01/2022	Gardeners Aid, Inc.	01-5800	OPEN PO- Equip Repair		218.39
1888254	04/01/2022	GM Labrucherie	21-6200	Playground Surfacing Materials		6,662.50
1888255	04/01/2022	Gold Star Foods, Inc.	13-4710	OPEN PO MV Food Supply	1,925.51	
				OPEN PO TM Food Supply	1,060.78	
			13-5800	CAFE: Food Storage	52.50	3,038.79
1888256	04/01/2022	Greenacre Homes	01-5800	NPS : C.V.S	3,220.02	
				NPS : R.C	8,438.07	11,658.09
1888257	04/01/2022	Hardware Tech Inc.	01-4380	Open PO- Maint Service all sites		1,153.00
1888258	04/01/2022	JetMulch Inc	25-5800	Playground Wood Chips		54,774.95
1888259	04/01/2022	John Deere Financial	01-4380	Open PO- Maint and Grounds	119.28	
			01-4390	Open PO- Maint and Grounds	131.98	
			01-5800	Open PO- Maint and Grounds	327.75	579.01
1888260	04/01/2022	Sally J Yates dba Kids Hear	01-5800	Nursing Services 2021/2022		9,700.00
1888261	04/01/2022	Lectorum Publications Inc	01-4310	Bilingual Library Grade 2-5		4,953.61
1888262	04/01/2022	Lectorum Publications Inc	01-4310	Bilingual Library Grade 2-5		1,060.66
1888263	04/01/2022	Maria Gabriela Porter	01-5800	Speech Language 2020/2021		8,925.00
1888264	04/01/2022	Straight Moving LLC	01-5800	General Moving Services		400.00
1888265	04/01/2022	Mike Brown Electric Co	01-5800	DO: OPEN PO for Electric Services		560.00
1888266	04/01/2022	North Bay Children's Center	12-5100	BUSD: Pre-School Program Adm		118,975.88
1888267	04/01/2022	Office Depot Inc	01-4350	OPEN PO- District Office Supplies		95.67

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Checks Dated 03/03/2022 through 04/12/2022

Check Number	Check Date	Pay to the Order of	Fund-Object	Comment	Expensed Amount	Check Amount
1888268	04/01/2022	MG Trust Company, LLC Attn: 07M00388	01-9540	TPA 000388/Trust ID 07C6DYQV		500.00
1888269	04/01/2022	TSA Midland National	01-9540	Pre Tax VOI Ded 10m		1,600.00
1888270	04/01/2022	Pro Care Therapy	01-5100	SLP's: Speech Language Pathologist		2,538.00
1888271	04/01/2022	Riverside Assessments LLC	01-5100	Psychoeducation Assessment		132.19
1888272	04/01/2022	Santa Rosa, City Of	01-5560	Open PO for Water bill MV & Spa	180.00	
			01-5858	Open PO for Water bill KW	1,193.45	
				Open PO for Water bill TM	3,907.04	5,280.49
1888273	04/01/2022	School Health Corporation	01-4390	Open PO Medical Supplies		541.28
1888274	04/01/2022	Soliant	01-5100	Speech Therapist & Speech Language Assistants		14,066.06
1888275	04/01/2022	Spurr	01-5510	Open PO Spurr		13,932.61
1888276	04/01/2022	West County Transportation	01-5833	Transportation to/from Taylor Mtn		1,774.25
1888277	04/01/2022	Westminster Woods Camp and Conference Center	01-5833	Outdoor Ed - TM		900.00
1888278	04/01/2022	WEX BANK	01-4362	DO : Fuel Card		391.42
1889118	04/06/2022	Roberto A Caballero Torres	01-5862	LIVE Scan		25.00
1889119	04/06/2022	King, Celeste E	01-5800	Teacher's Stipend		300.00
1889120	04/06/2022	Grenier, Angela C	01-5800	Teacher's Stipend		300.00
1889121	04/06/2022	Gomez, Maria T	01-5201	Mileage Expense (P/U mail)	343.96	
				Mileage Expense (P/U mail)	141.46	485.42
1889122	04/06/2022	Duarte, Jennifer R	01-5800	Teacher's Stipend		300.00
1889123	04/06/2022	Advanced Security Systems-SR	01-5800	BV : Fire Monitoring/ Security System	226.50	
				BV: Burglar Alarm Monitoring	147.00	
				ELC: Burglar Alarm Monitoring	147.00	
				KW : Fire Monitoring	226.50	
				KW: Burglar Alarm Monitoring	147.00	
				MV : Fire Monitoring	226.50	
				MV Annex Burglar Alarm Monitoring	147.00	
				MV:Burglar Alarm Monitoring MEDIA & LIBRARY	147.00	
				TM : Fire Monitoring	106.50	
				TM: Burglary Alarm Monitoring Fee	147.00	1,668.00
1889124	04/06/2022	AlSCO (American Linen)	13-5800	Open PO- KS		64.32
1889125	04/06/2022	Atkinson Andelson Loya Ruud & R omo	01-4350	Frisk Manual for HR		50.25
1889126	04/06/2022	Banerjea, Pia	01-5800	Psychoeducational Assessments		1,900.00
1889127	04/06/2022	Valley Comfort Heating & Air	01-5800	Open PO : 2021/2022		370.00
1889128	04/06/2022	Buchanan Food Service	13-4710	OPEN PO :-B.V. Food for Food Svc		1,174.51
1889129	04/06/2022	AT & T	01-5911	Open PO CALNET3		129.77

The preceding Checks have been issued in accordance with the District's Policy and authorization of the Board of Trustees. It is recommended that the preceding Checks be approved.

ESCAPE ONLINE

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Checks Dated 03/03/2022 through 04/12/2022

Check Number	Check Date	Pay to the Order of	Fund-Object	Comment	Expensed Amount	Check Amount
1889130	04/06/2022	Clover Stornetta Farms Inc	13-4715	BV- Student Milk	338.00	
				KW- Student Milk	178.00	
				MV- Student Milk	128.00	644.00
1889131	04/06/2022	Coastline Distributors, Inc	13-4710	OPEN PO- BV - Fruit & Vegetable	715.25	
				OPEN PO- MV - Fruit & Vegetable	664.17	1,379.42
1889132	04/06/2022	Discovery Office Systems	01-4310	DO: SF5130 RiscoGraph Consumption Fee		173.22
1889133	04/06/2022	DK Landscaping	01-5800	M&O: OPEN PO for Landscape service		12,613.21
1889134	04/06/2022	Document Tracking Services, LLC	01-5803	2022 Local Control & Accountability Plan		3,414.00
1889135	04/06/2022	ESP & Alarm Inc.	01-5805	Open PO BV Monthly Patrols	375.00	
				Open PO KS/ELC Monthly Patrols	750.00	
				Open PO MV Monthly Patrols	375.00	
				Open PO TM Monthly Patrols	375.00	1,875.00
1889136	04/06/2022	Fire Safety Supply	01-5800	M&O: Fire extinguisher & Services		80.08
1889137	04/06/2022	Fishman Supply Co	01-4370	M&O: Custodial Supplies@BV	1,324.91	
				M&O; Custodial Supplies @ DO	50.89	
				M&O; Custodial Supplies @ MV	2,717.27	
			01-5800	M&O: Custodial Equipment Repairs	270.47	4,363.54
1889138	04/06/2022	Frontline Technologies	01-5860	Absence & Substitute Mgmt		1,575.00
1889139	04/06/2022	Gold Star Foods, Inc.	13-4710	OPEN PO BV Food Supply	2,076.74	
				OPEN PO MV Food Supply	1,401.83	3,478.57
1889140	04/06/2022	Hardware Tech Inc.	01-4380	Open PO- Maint Service all sites		335.00
1889141	04/06/2022	MBS Engineering Inc	21-6200	ES Water Leak Repair	15,694.09	
				Leak Detection & Pothole	37,170.17	52,864.26
1889142	04/06/2022	McGraw-Hill School Education Holdings, LLC	01-4310	Curriculum		1,100.48
1889143	04/06/2022	Rexel USA, INC Platt Electric Supply	01-4370	DO- OPEN PO Replace Light Bulbs	79.84	
			01-4380	DO- OPEN PO Replace Light Bulbs	74.20	154.04
1889144	04/06/2022	Play Marimba Programs LLC	01-5800	Marimba Music Instruction		1,500.00
1889145	04/06/2022	Pylon Communications LLC	01-5911	IT: Telephone Service 2021/22		2,731.67
1889146	04/06/2022	Marylou Herrera DBA Red Light Learning	01-5803	Translation Service		96.25
1889147	04/06/2022	School & College Legal Service Sonoma County Office of Ed.	01-5823	OPEN PO - Legal Services 2021/2022		5,333.50
1889148	04/06/2022	Julie Burns	01-5803	Interpretation For Special Boad Meetings		1,000.00
1889983	04/08/2022	Alsco (American Linen)	13-5800	Open PO- TM		113.42
1889984	04/08/2022	SYNCB/Amazon	01-5840	ITECH: Supplies		133.77
1889985	04/08/2022	Ameriflex	01-5800	DO: FSA Admin Fee 6 Employees	52.36	
			01-5858	DO: FSA Admin Fee 6 Employees	7.64	60.00

The preceding Checks have been issued in accordance with the District's Policy and authorization of the Board of Trustees. It is recommended that the preceding Checks be approved.

ESCAPE ONLINE

Page 8 of 9

Checks Dated 03/03/2022 through 04/12/2022

Check Number	Check Date	Pay to the Order of	Fund-Object	Comment	Expensed Amount	Check Amount
1889986	04/08/2022	Aunt Flow	01-5800	Hygiene Product & Dispensers: Feminine		1,720.00
1889987	04/08/2022	BAM Plumbing	21-6200	C Wing Sewer Replacement		24,200.00
1889988	04/08/2022	Becoming Independent	01-5800	BUSD Shredding Services		35.00
1889989	04/08/2022	Buchanan Food Service	13-4710	OPEN PO: TM Food for Food Svc		1,424.76
1889990	04/08/2022	Clover Stornetta Farms Inc	13-4715	BV- Student Milk	687.68	
				TM- Student Milk	483.00	1,170.68
1889991	04/08/2022	Coastline Distributors, Inc	13-4710	OPEN PO- BV - Fruit & Vegetable	331.20	
				OPEN PO- TM - Fruit & Vegetable	1,173.75	1,504.95
1889992	04/08/2022	Fishman Supply Co	01-4370	M&O; Custodial Supplies @ MV		134.56
1889993	04/08/2022	Friedman's Home Improvement	01-4380	Open PO General Dist Maint	140.14	
			01-4390	Open PO General Dist Maint	46.71	186.85
1889994	04/08/2022	Gold Star Foods, Inc.	13-4710	OPEN PO MV Food Supply	439.62	
				OPEN PO TM Food Supply	2,324.00	2,763.62
1889995	04/08/2022	Lakeshore Learning	01-4310	Seating for Students		309.38
1889996	04/08/2022	Paradigm Healthcare Services	01-5800	Contracted service for Medical Billing 2021/2022		292.13
1889997	04/08/2022	TLCD Architecture	21-6200	KS Modernizaton Architecture		10,547.29
Total Number of Checks					204	<u><u>1,196,674.59</u></u>

Fund Recap

Fund	Description	Check Count	Expensed Amount
01	General Fund	153	658,557.51
12	Child Development Fund	2	151,975.88
13	Cafeteria Fund	34	82,502.99
21	Building Fund	12	239,494.30
25	Capital Facilities Fund	6	64,143.91
Total Number of Checks		204	1,196,674.59
Less Unpaid Tax Liability			.00
Net (Check Amount)			<u><u>1,196,674.59</u></u>

The preceding Checks have been issued in accordance with the District's Policy and authorization of the Board of Trustees. It is recommended that the preceding Checks be approved.

ESCAPE ONLINE

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Santa Rosa, CA 95403

Bellevue Union School District

Consent Calendar for Board Meeting of April 19, 2022

- 9. Consent Calendar
 - 9.1. Summer School Chromebook purchase
 - 9.2. Board Meeting Minutes
 - 9.2.1. Special Board Meeting Minutes March 16, 2022
 - 9.2.2. Special Board Meeting Minutes March 12, 2022
 - 9.2.3. Regular Board Meeting Minutes March 8, 2022
 - 9.3. Acknowledge and Accept Grants & Donations
 - 9.3.1. Kawana Student Support Fund of Community Foundation Sonoma County, multicultural 4th grade marimba class, \$1,500 - Kawana Springs
 - 9.3.2. Project Lead the Way/Medtronic Grant, PLTW STEM Launch, \$20,000 - Kawana Springs
 - 9.3.3. Project Lead the Way/Medtronic Grant, PLTW STEM Launch, \$20,000 - Meadow View
 - 9.4. Personnel Activity Log

Recommended Action:

It is recommended that the Board of Trustees approve the agenda items on the Consent Calendar.

Supporting Documents:

Backup documentation for each item on the Consent Calendar.



Pricing Proposal
Quotation #: 21728369
Created On: 3/10/2022
Valid Until: 4/29/2022

Bellevue Union Elementary School District

Ryan Green

3150 Education Drive
Santa Rosa, CA 95407
United States
Phone: (707) 542-5197
Fax:
Email: rgreen@busd.org

Senior Inside Account Executive

Francesca Lima

290 Davidson Ave
Somerset, NJ, 08873
Phone: 732-652-3092
Fax: 732-652-3099
Email: Francesca_Lima@shi.com

All Prices are in US Dollar (USD)

Product	Qty	Your Price	Total
1 Dell Chromebook 3100 - Celeron N4020 / 1.1 GHz - Chrome OS - 4 GB RAM - 32 GB eMMC - 11.6" TN 1366 x 768 (HD) @ 60 Hz - UHD Graphics 600 - Wi-Fi 5, Bluetooth - with 1 Year Dell Mail-In Service - Dist SNS Dell - Part#: H5CRW Contract Name: NASPO Computer Equipment Contract #: MNWNC-108 Subcontract #: 67AHH	400	\$265.50	\$106,200.00
2 Dell Chromebook 3100 - Celeron N4020 / 1.1 GHz - Chrome OS - 4 GB RAM - 32 GB eMMC - 11.6" TN touchscreen 1366 x 768 (HD) @ 60 Hz - UHD Graphics 600 - Wi-Fi 5, Bluetooth - BTS - with 1 Year Dell Mail-In Service - Dist SNS Dell - Part#: P72FM Contract Name: NASPO Computer Equipment Contract #: MNWNC-108 Subcontract #: 67AHH	80	\$279.90	\$22,392.00
3 CA RECYCLING FEE FOR MONITORS (4-14) SHI International Corp - Part#: CA-RECYC-S	480	\$4.00	\$1,920.00
4 Google Chrome OS Management Console - License - academic Google - Part#: CROS-SW-DIS-EDU-NEW	480	\$32.50	\$15,600.00
Subtotal			\$146,112.00
Shipping			\$0.00
*Tax			\$10,930.32
Total			\$157,042.32

*Tax is estimated. Invoice will include the full and final tax due.

Additional Comments

Please note: Google has a zero returns policy.

T&C
Google will present the Google TOS upon each Customer first log in to the Services. Customer must accept the Google TOS prior to

using the services. SHI will not accept the TOS on the customer's behalf.

Google Chrome TOS: <https://www.google.com/chrome/terms/chrome-device-management/index.html>

Please note, if Emergency Connectivity Funds (ECF) will be used to pay for all or part of this quote, please let us know as we will need to ensure compliance with the funding program.

Hardware items on this quote may be updated to reflect changes due to industry wide constraints and fluctuations.

The Products offered under this proposal are resold in accordance with the [SHI Online Customer Resale Terms and Conditions](#), unless a separate resale agreement exists between SHI and the Customer.

BUSD March 15, 2022 Board Meeting Minutes

1. Open Session 4:30 P.M.

The Board Meeting of the Bellevue Union School District Board of Trustees was called to order at 4:31 pm by Trustee Jamie Padilla, In person at the Bellevue Union School District Office.

1.1. Call To Order

1.2. Flag Salute: Waived

Members Present: Jamie Padilla, Lisa Reyes, Adele Walker, Stephanie Merrida-Grant

Members Absent: John Jarvis

Late Arrivals: None

Early Departures: None

District Office Staff Present: None

Others Present: Loyal Carlon

2. Public Comment on Closed Session Agenda None

3. Adjourn To Closed Session: 4:32 P.M.

3.1. Closed Session Agenda

3.1.1. Public Employment § 54957

3.1.1.1. Superintendent

Open Session Adjournment Time: 5:11 pm

Respectfully Submitted,

By David Alexander, Ed.D.
Secretary to the Board and
District Superintendent

BUSD March 15, 2022 Board Meeting Minutes

Board Signature: _____ Date: _____

BUSD March 8, 2022 Board Meeting Minutes

1. Open Session 5:30 P.M.

The Board Meeting of the Bellevue Union School District Board of Trustees was called to order at 5:36 pm by Trustee Jamie Padilla, In person at the Bellevue Union School District Office & Streamed Live Via Zoom on the BUSD Homepage.

1.1. Call To Order

1.2. Public Comment on Closed Session AgendaNone

2. Adjourn To Closed Session: 5:38 P.M.

2.1. Closed Session Agenda

2.1.1. Public Employment: Superintendent Search § 54957

2.1.2. Public Employment § 54957

2.1.3. Public Employee Discipline/Dismissal/Release § 54957

3. Reconvene To Regular Session: 6:47 P.M.

3.1. Flag Salute: Roger Farrell led the flag salute.

Members Present: Jamie Padilla, Lisa Reyes, Adele Walker, Stephanie Merrida-Grant, and David Alexander

Members Absent: John Jarvis

Late Arrivals: None

Early Departures: None

District Office Staff Present: David Alexander, Moriah Hart, Chris Kim, Tracy Whitaker, Aracely Romo-Flores, Roger Farrell, Michael Kellison, Jose Santamaria

Others Present: See Sign in Sheet/zoom meeting image capture.

3.2. Report on Closed Session

“In closed session the Board took action to non-reelect 1.0 FTE classroom teacher. Board Members Stephanie Merrida-Grant, Lisa Reye, Adele Walker and Jamie Padilla voted yes; and board member John Jarvis was absent.

3.3. Consider Agenda Adjustment None

3.4. Public Comment: None

BUSD March 8, 2022 Board Meeting Minutes

4. Informational

- 4.1. COVID-19 Updates, Tracy Whitaker, M.A. Director of Student Services & BUSD COVID-19 Coordinator

5. Discussion/Action

5.1. Board Discussion of the Updated State Health Guidance: Lifting School Mask Mandate

- 5.1.1. On a motion by Adele Walker and a second by Lisa Reyes the Board approved the extension of indoor masking and to revisit those guidelines at the next board meeting

Action: Approved

Vote	4	Ayes
	0	Noes
	1	Absent John Jarvis

6. Information/Action

- 6.1. On a motion by Adele Walker and a second by Stephanie Merrida-Grant the Board approved the FY 2021/22 Second Interim Financial Report and Budget Transfers, Chris Kim, Ed.D., Chief Business Officer

Action: Approved

Vote	4	Ayes
	0	Noes
	1	Absent John Jarvis

7. Action

- 7.1. On a motion by Adele Walker, second by Stephanie Merrida-Grant, the Board approved the Job Description and Rate of Pay for Learning Coordination (Summer School & Special Programs) Administrator

Action: Approved

Vote	4	Ayes
	0	Noes

BUSD March 8, 2022 Board Meeting Minutes

	1	Absent John Jarvis
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- 7.2. On a motion by Stephanie Merrida-Grant, second by Lisa Reyes, the Board approved the E-Rate Proposals for 2022 E-Rate funding

Action: Approved

Vote	4	Ayes
	0	Noes
	1	Absent John Jarvis

- 7.3. On a motion by Lisa Reyes, second by Stephanie Merrida-Grant, the Board approved the 2022-23 Calendar

Action: Approved

Vote	4	Ayes
	0	Noes
	1	Absent John Jarvis

- 7.4. Ratification of Bills and warrants

Payroll Totals

Manual Payroll 2/17/2022

Certificated	1,788.77
Classified	<u>(2,439.74)</u>
Total	(650.97)

Regular Payroll 2/28/2022

Certificated	728,422.55
Classified	<u>301,244.54</u>
Total	1,029,667.09

Supplemental Payroll 3/10/2022

Certificated	-
Classified	-
Total	-

Total: 1,029,016.12

Accounts Payable Totals:

BUSD March 8, 2022 Board Meeting Minutes

Fund Description	Expensed Amount
01 General Fund	429,644.39
12 Child Dev Fund	161,601.84
13 Cafeteria Fund	46,794.78
21 Building Fund	260,557.61
<u>25 Cap Facilities Fund</u>	<u>18,393.69</u>
Total Payables	\$916,992.31

On a motion by Lisa Reyes, second by Adele Walker, the Board ratified the Bills and Warrants.

Action: Approved

Vote	4	Ayes
	0	Noes
	1	Absent John Jarvis

8. Consent Calendar

8.1. 2021-22 Classified Seniority List

8.2. Contracts

8.2.1. Contract with Christy White and Associates

8.2.2. CSBA GAMUT 2021-22 Service Agreement

8.3. Board Meeting Minutes

8.3.1. Regular Board Minutes February 15, 2022

8.4. Acknowledge and Accept Grants & Donations

8.4.1. Assistance for Arts Education Grant, US Department of Education/Boys & Girls Club of Sonoma-Marin/iAmplify, Bellevue Union School District

8.4.2. Donors Choose: Learn About the World Through Puzzles, \$280, Bellevue Elementary School, King

8.4.3. Donors Choose: LEGO Sets for STEAM Activities and to Foster Creativity, \$607, Bellevue Elementary School, Logsdon

8.4.4. Donors Choose: The Power of Printing, \$341, Bellevue Elementary School, Bridges

8.4.5. Donors Choose: Let's Getting Rewarding, \$150, Bellevue Elementary School, Ballard

8.4.6. Donors Choose: let's get reading (moveable easel), \$500, Bellevue Elementary School, Ballard

8.5. Personnel Activity Log

On a motion by Adele Walker, second by Stephanie Merrida-Grant, the Board approved the Consent calendar

Action: Approved

Vote	4	Ayes
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BUSD March 8, 2022 Board Meeting Minutes

	0	Noes
	1	Absent John Jarvis

9. Reports

9.1. California School Employees Association, Chapter 501 N/A

Bellevue Education Association

Julie McMurtrie, co-BEA President - Good evening members of the board and Dr. Alexander,

We hope you are doing well. We are happy to report that after days of negotiations, BEA has voted to accept the 2022/2023 calendar and ratify our contract. Many proposals on both sides were withdrawn and tabled for the coming years. Two of the more pressing issues that remain are class size reduction and changing the language to allow teachers to transfer sites within the district. Please expect to hear from the members in the near future concerning these as we are very passionate about these issues. We did come to an agreement about raising daily overages and allowed some flexibility with our extra committee work. We are very excited that we agreed on minimum days for the first two days of school as we feel this is what is best for students and teachers. At the request of the board members, we agreed to have two separate BTSN and Open Houses so that you are able to get into more classrooms. We look forward to seeing you there.

One area that BEA is always looking at is teacher morale so we apologize if we are sharing some of the same information that the principals are going to share, but we wanted to let you know about the things that are exciting our students and teachers. Basketball is in full swing and our kids are loving it. It is so exciting to watch them compete and another step to getting back to “normal”. Yesterday, Kawana and Taylor Mountain battled it out with the Hawks squeaking out a win. Classes are going on field trips again and our 6th graders will be going to outdoor ed in the next few months. Several classes are getting salmon that they will study as they grow.

Second trimester assessments have been completed and report cards are going home tomorrow. Teachers are excited to be done with those and are looking forward to Spring Break! Only 7 more school days, but who’s counting?!?!

As we are all aware, we are still experiencing a teacher shortage throughout California and the rest of the nation. We will need to hire some more teachers before the next school year and we know BUSD is starting the process already. We hope to interview early so we can get the best candidates out there. We are excited to have a competitive salary schedule that is helping to attract and retain quality teachers.

Thank you for your time and enjoy Spring Break.

9.2. Principal Report

Principal’s Report: Nina Craig, Bellevue

BUSD March 8, 2022 Board Meeting Minutes

Good evening members of the board and Dr. Alexander.

This past month we've worked hard to support our teachers and staff as we transition into the final trimester of the year. We are maintaining high expectations for the work on which we have focused all year while looking forward to setting the foundation for next year's goals and initiatives.

The district BEST committee has met multiple times to learn more about Achieve the Core's recommendations for Priority standards in ELA. The BEST team is making recommendations to each grade level team based on this information. District grade level teams will be meeting tomorrow to review these recommendations and consider updating the current priority standards. As a reminder these are the standards that grade level teams are agreeing to provide intervention and ensure students have multiple opportunities to demonstrate mastery on.

Principals have received their site Youth Truth Survey results. We attended a training session to help us learn how to navigate the reports. We are pleased with the response rate of parents, staff, and students and have received valuable feedback. We are presenting this data to our Site Councils and site leadership committees in order to help us identify areas of strength and improvement. We will be creating site goals and actions that should help us improve in identified areas.

We attended the district's first Universal Pre Kindergarten Committee meeting this month. We look forward to the work of developing a plan that will not only serve our Pre-K students, but also serve as a foundation that will support alignment for our K-3 grades as well. Principals have continued to recruit and hold school tours for families interested in, or are newly registering for, our TK and Kinder programs for next school year.

ELPAC testing continues at all sites. Third - sixth grade teachers are giving this high stakes assessment to their Emerging Bilingual students. So far students are reporting that the assessment questions are familiar to them as they have done some practice in the classroom to help familiarize them with the types of questions they are expected to answer. This seems to have decreased some anxiety some students have around taking this language acquisition test.

The MTSS Committee has chosen to recommend an SEL curriculum to district leadership! This committee has worked hard to research a variety of curriculums and gather input from all staff. They are super excited to move forward with their recommendation. Next steps will include the district's purchase of the curriculum and training for the staff.

All sites continue to build community, increase engagement, and work towards creating positive school culture by holding a variety of events. Some examples of this are: celebrating Read Across America Day, hosting Spirit Days, bringing in culturally relevant guest speakers, hosting site Science Fairs, starting up Girls Basketball, honoring students of the month, ...

We would like to thank our teachers for their hard work preparing report cards and progress reports that will go home with students tomorrow.

9.3. Board Reports/Board Items

9.3.1. Correspondence

BUSD March 8, 2022 Board Meeting Minutes

Lisa Reyes reported she has been attending the basketball games and trying to get to as many as possible to see her grandkids play. She asked to make sure we are testing the students weekly. She also shared she was disappointed hearing “battle it out.” She said “We’re here for fun. The first question should be did you have fun? The focus should be on good sportsmanship.”

Adele Walker encouraged everyone to have a great spring break and get some rest.

Jamie Padilla thanked everyone for stepping up this year and to enjoy their spring break.

9.4. Superintendent Report

9.4.1. Enrollment Update

Dr. Alexander mentioned that the principals thanked the teachers in their report and said “We really appreciate all of the hard work the teachers do, but I also want to thank the Admin team for stepping up and putting in 10-12 hour days. They are willing to do what it takes to get it done to support our students and staff. You are the best Admin team, thank you for everything you do.”

10. Planning

April 19, 2022	Regular Board Meeting	5:30pm	BUSD Districts Office 3150 Education Drive and To be live streamed on zoom linked from the District’s Homepage: www.busd.org
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~~11. Returned to Closed Session~~

Open Session Adjournment Time: 8:09 pm

Respectfully Submitted,

By David Alexander, Ed.D.
Secretary to the Board and
District Superintendent

BUSD March 8, 2022 Board Meeting Minutes

Board Signature: _____ Date: _____

BUSD March 12, 2022 Board Meeting Minutes

1. Open Session 9:30

The Board Meeting of the Bellevue Union School District Board of Trustees was called to order at 9:37 am by Trustee Jamie Padilla, In person at the Sonoma COunty Office of Education 5340 Skylane Blvd.

1.1. Call To Order

1.2. Flag Salute: Jamie Padilla led the flag salute.

Members Present: Jamie Padilla, Lisa Reyes, Adele Walker

Members Absent: John Jarvis, Stephanie Merrida-Grant

Others Present: Loyal Carlon, John Laughlin

1.3. Public Comment None

1.4. Orientation and Review of Interview Schedule

2. Public Comment on Closed Session Agenda None

3. Adjourn To Closed Session: 9:38 P.M.

3.1. Closed Session Agenda

3.1.1. Closed Session Agenda

3.1.1.1. Public Employment § 54957

3.1.1.1.1. Superintendent Interviews

4. Planning

April 19, 2022	Regular Board Meeting	5:30pm	BUSD Districts Office 3150 Education Drive and To be live streamed on zoom linked from the District's Homepage: www.busd.org
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BUSD March 12, 2022 Board Meeting Minutes

5. Closed Session Adjourned 4:00pm

6. Closed Session reconvened Monday March 14, 2022 1:00pm at the Bellevue Union School District Office 3150 Education Dr.

Members Present:

Jamie Padilla, Lisa Reyes, Adele Walker, Stephanie Merrida-Grant

Members Absent:

John Jarvis

Others Present:

Loyal Carlon

7. Closed Session Agenda

7.1. Closed Session Agenda

7.1.1. Public Employment § 54957

Closed Session Adjournment Time: 4:30 pm

Respectfully Submitted,

By David Alexander, Ed.D.
Secretary to the Board and
District Superintendent

Board Signature: _____ Date: _____

Bellevue Union School District
Board Meeting
Tuesday March 8, 2022
Sign-in Sheet

	Name	School Site/Community Member
1	Roger Farrell	BUSD
2	Dargant Jacobson	TM
3	Jean Walker	MV
4	Becky Hansen	BEA
5	Julie McMurtrei	BEA
6	Aracely Romo-Finey	LC
7	Denise McCullough	KS
8		
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21		
22		



Moriah Hart - Executive Assist...



Zoom Admin



Spanish Interpreter Gilberto Mar...



Spanish Interpreter-Rebecca ...



Tracy Whitaker - Director of S...

Participants (13)

Panelists (6)

Attendees (7)

ES Ellana Silva

JM Jennifer McClendon

KE Kelly Evans

KA Kimberlee Armstrong

K KM

MM Melissa Moore

SB Shelby Ballard

Live Transcription (Closed Captioning) has been enabled

Who can see this transcript? Recording on





Moriah Hart - Executive Assist...



Zoom Admin



Spanish Interpreter Gilberto Mar...



Spanish Interpreter-Rebecca ...



Tracy Whitaker - Director of S...

View

Participants (13)

Panelists (6)

Attendees (7)



Moriah Hart - Executive As... (Me)



Zoom Admin (Host)



Tracy Whitaker - D... (Co-host)



Zoom Admin (Co-host)



Spanish Interpr... (Interpreter) ES



Spanish Interpr... (Interpreter) ES



Recording

Live Transcription (Closed Captioning) has been enabled Who can see this transcript? Recording on

Zoom Admin

Invite

Unmute Me

Panelists (7)

Attendees (9)

Search

AB Ashley Bridges

ES Ellana Silva

JM Jennifer McClendon

KM Karen M

KE Kelly Evans

KA Kimberlee Armstrong

K KM

MM Melissa Moore

SB Shelby Ballard

Total Number and Percent of Response by Group <i>Número total y porcentaje por respuesta por grupo</i>	Parent Padre # %	Certificated Staff Personal Certificado # %	Classified Staff Personal Clasificado # %	Administration Staff Personal Administrativo # %	No Response No Hubo Respuesta # %	TOTALS TOTALES # %
Totals / Totales	436 72.1%	89 14.7%	66 10.9%	14 2.3%	5 0.8	610

Total Number and Percent by Group for Each Answer Choice <i>Número total y porcentaje por grupo por cada opción de respuesta</i>	Parent Padre # %	Certificated Staff Personal Certificado # %	Classified Staff Personal Clasificado # %	Administration Staff Personal Administrativo # %	No Response No Hubo Respuesta # %	TOTALS TOTALES # / %
Continue to require masking while indoors <i>Continúe requiriendo enmascaramiento mientras estemos en interiores</i>	230 52.7%	36 40.4%	22 33.3%	2 14.2%	2	292 48.3%
Require masking only in a class where there has been a verified exposure <i>Requerir enmascaramiento solo en una clase donde ha habido una exposición verificada</i>	53 12.2%	8 9%	4 6.1%	2 14.2%	0	67 11.1%
Allow students and staff to choose whether or not to wear a mask indoors <i>Permita que los estudiantes y el personal elijan si usar o no una máscara en el interior</i>	148 33.9%	44 49.4%	40 60.6%	10 71.4%	3	245 40.6%
No Response <i>No Hubo Respuesta</i>	5 1%	1 1%	0	0	0	6

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Recording

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Participants (12)

Panelists (7) Attendees (5)

- AB Ashley Bridges
- KE Kelly Evans
- KA Kimberlee Armstrong
- K KM
- TG teresa gomez

Chat

BELLEVUE UNION SCHOOL DISTRICT						
	Actual	Actual	Actual	2nd Interim	Projection 1	Projection 2
BUSD	2018/19	2019/20	2020/21	2021/22	2022/23	2022/23
Total Enrollment (w/COE)	1,652	1,628	1,556	1,508	1,473	1,473
Funded ADA	1,640	1,557	1,548	1,535	1,431	1,500

	Actual	Actual	Actual	1st Interim	Projection	Projection
BUSD	2018/19	2019/20	2020/21	2021/22	2022/23	2022/23
Cost of Living Adjustment	3.70%	3.26%	0.00%	5.07%	5.33%	5.33%
Increase to Salary Schedules	4.00%	4.00%	5.00%	4.00%	TBD	TBD

Enrollment / Hold Harmless / COLA



Bellevue Union School District Personnel Activity Log

For the period: March 8, 2022-April 18, 2022

Date of Board Approval: April 19, 2022

Employment

Classified:

1. Lynn Wong, 0.625 FTE, Food Service Program Manager, Bellevue Union School District
Effective: March 28, 2022
2. Megan Arlich, 0.5 FTE, Literacy Paraprofessional, Meadow View Elementary School
Effective: March 7, 2022
3. Erika Villa, 0.25 FTE, Student Supervisor, Bellevue Elementary School
Effective: March 28, 2022
4. Hunter Rinnels, 0.5 FTE, Student Supervisor, Meadow View Elementary School
Effective: April 1, 2022
5. Gabriela Hernandez, 0.25 FTE, Instructional Assistant, Kawana Springs Elementary School
Effective: February 18, 2022
6. Rhiannon Hayes, 0.75 FTE, Special Education Instructional Assistant, Kawana Springs Elementary School
Effective: March 15, 2022

Certificated:

1. Peggy Stark, 0.20 FTE, 1st Grade, Bellevue Elementary (20% Job Share)
Effective: 2022-2023 School Year
2. Gina Carinalli-Barnes, 1.0 FTE, Grade Leve & Site: TBD
Effective: 2022-2023 School Year
3. Brittany Miller, 1.0 FTE, Grade Leve & Site: TBD
Effective: 2022-2023 School Year
4. Laura Halligan, 1.0 FTE, Grade Leve & Site: TBD
Effective: 2022-2023 School Year

5. Alyssa Pappas, 1.0 FTE, Grade Level & Site: TBD
Effective: 2022-2023 School Year
6. Ashley Johnson, 1.0 FTE, Grade Level & Site: TBD
Effective: 2022-2023 School Year
7. Mindy Duncan, 1.0 FTE, Special Day Class Teacher, Taylor Mountain Elementary School
Effective: 2022-2023 School Year

Job Shares:

Certificated:

1. Caroline Boyce, 1st Grade, Bellevue Elementary, 80% Job Share with Sarah Griffith (20%)
Effective: 2022-2023 School Year
2. Ashley Bridges, 6th Grade, Bellevue Elementary, 80% Job Share with Sarah Griffith (20%)
Effective: 2022-2023 School Year
3. Kimberly Toller, 6th Grade, Bellevue Elementary, 80% Job Share with Sarah Griffith (20%)
Effective: 2022-2023 School Year
4. Stephanie Gerke, 1st Grade, Bellevue Elementary, 80% Job Share with Peggy Stark (20%)
Effective: 2022-2023 School Year

Change of Contract

1. Paula Hernandez, 1.0 FTE, Family Engagement Facilitator, Meadow View Elementary School
Effective: April 1, 2022
2. Amy Flores Casares, 1.0 FTE, Family Engagement Facilitator, Bellevue Elementary School
Effective: March 7, 2022

Unpaid Leave of Absence

Nothing to report at this time

Resignations

Classified:

1. Paula Hernandez, 0.5 FTE, Student Supervisor, Meadow View Elementary School
Effective: March 31, 2022
2. Ana Santos Olmsted, 0.0625 FTE, Kawana Springs Elementary School
Effective: March 28, 2022
3. Patrick Herring, 0.5 FTE, Maintenance Technician, Bellevue Union School District
Effective: March 17, 2022

Certificated:

1. Erica Narez, 1.0 FTE, Classroom Teacher, Kawana Springs Elementary School
Effective: June 3, 2022
2. Michelle Verporter, 1.0 FTE, SDC Teacher, Taylor Mountain Elementary School
Effective: June 3, 2022
3. Beau Boucher, 1.0 FTE, Classroom Teacher, Kawana Springs Elementary School
Effective: June 3, 2022
4. Emily Husar, 1.0 FTE, Classroom Teacher, Bellevue Elementary School
Effective: June 3, 2022
5. Christine Gould, 1.0 FTE, Classroom Teacher, Kawana Springs Elementary School
Effective: March 28, 2022

Retirements:

Nothing to report at this time



BELLEVUE UNION SCHOOL DISTRICT

Current Enrollment

School	8/12/2021	9/13/2021	10/13/2021	11/3/2021	12/14/2021	1/8/2022	2/8/2022	3/2/2022	4/14/2022	5/13/2022	6/5/2022
Bellevue	392	385	392	391	385	384	395	393	396		
Kawana	305	289	287	287	286	286	285	285	287		
Meadow View	384	374	375	375	376	377	381	384	386		
Taylor Mountain	406	414	413	416	419	421	424	427	421		
Independent Study	0	19	23	23	20	21	21	19	19		
Total Enrollment	1487	1481	1490	1492	1486	1489	1506	1508	1509	0	0

Census Day (CalPADS/LCFF) Enrollment (1st Wednesday of October)

School	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
District	1736	1786	1769	1802	1753	1691	1616	1596	1539	1486	
Charter	0	37	71	94	145	144	0	0	0	0	
Total Enrollment	1736	1823	1840	1896	1898	1835	1616	1596	1539	1486	TBD

Attendance (P2, Average Attendance over 8 Months) Reported in the Month of April

School	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Bellevue	403	406	391	366	387	397	376				
Kawana	388	381	365	337	337	322	321				
Meadow View	397	409	425	437	406	382	353				
Taylor Mountain	502	503	483	456	413	415	381				
District Attendance	1690	1699	1664	1597	1543	1517	1430	0	TBD	TBD	TBD
<i>% Attendance</i>	<i>95.52%</i>	<i>94.26%</i>	<i>94.92%</i>	<i>94.41%</i>	<i>95.46%</i>	<i>95.02%</i>	<i>92.94%</i>	<i>0.00%</i>			
Charter	76	105	131	141	0	0	0	0	0	0	0
With Charter	1765	1803	1794	1737	1543	1517	TBD	TBD	TBD	TBD	TBD
<i>% Attendance</i>	<i>95.94%</i>	<i>95.12%</i>	<i>94.54%</i>	<i>94.69%</i>	<i>95.46%</i>	<i>95.02%</i>					

Updated: 4/13/22