

Colton Joint Unified School District

Student Services Center, Board Room, 851 South Mt. Vernon Ave., Colton, CA 92324



Minutes March 17, 2011

The Board of Education of the Colton Joint Unified School District met for a Regular Meeting on Thursday, March 17, 2011 at 5:30 p.m. in the Board Room at the CJUSD Student Services Center, 851 So. Mt. Vernon Avenue, Colton, California.

Trustees Present

Mrs. Patt Haro, President
Mr. Robert D. Armenta Jr., Vice President
Mr. Frank A. Ibarra, Clerk
Mr. Randall Cenicerros
Mr. Roger Kowalski
Mr. Pilar Tabera
Mr. Kent Taylor

Staff Members Present (*excused)

Mr. Jerry Almendarez	Mr. Todd Beal
Mr. Jaime R. Ayala	Mr. Brian Butler
Mr. James A. Downs	Mrs. Jennifer Jaime
Mrs. Mollie Gainey-Stanley	Ms. Sosan Schaller
Mrs. Ingrid Munsterman	Mr. Darryl Taylor
Mr. Mike Snellings *	Ms. Katie Orloff
Mrs. Bertha Arreguín	Ms. Jennifer Rodriguez

Strategic Plan -- Mission Statement

The Mission of the Colton Joint Unified School District, a team of caring employees dedicated to the education of children, is to ensure each student learns the academic knowledge and skills necessary to thrive in college or in the workforce and be responsible, productive citizens by providing engaging, challenging, and enriching opportunities and specialized programs in a safe environment in partnership with students, families and our diverse communities

1.0 OPENING Call to Order/Renewal of the Pledge of Allegiance

Board President Haro called the meeting to order at 5:30 p.m. Board Member Taylor led in the renewal of the Pledge of Allegiance.

2.0 SPECIAL PRESENTATIONS ~ None

3.0 SCHOOL SHOWCASE ~ None

4.0 ADMINISTRATIVE PRESENTATIONS

4.1 Supplemental Employee Retirement Program (SERP) Report –

Assistant Superintendent Jaime R. Ayala provided a brief update on the proposed SERP. To best serve the financial needs of the District, the recommendation is to offer the SERP to certificated employees only. In addition to certificated unit members, the SERP also will be offered to certificated management only if it will save the District money. Mr. Ayala reminded the Board that approving Resolution No. 11-52, authorizing the implementation of a Supplemental Employee Retirement Program (SERP) for eligible employees retiring by June 30, 2011, authorizes the District to proceed with offering the SERP to determine how many employees will actually enroll. At that time, an analysis will be performed to determine the potential savings so a final recommendation can be presented to the Board regarding whether to carry out a SERP for 2011.

Ms. Claudia Ross, Keenan and Associates, presented the proposal in detail and also explained the rationale for not offering the SERP to classified employees. **(EXHIBIT A)**

4.2 Budget Update

Assistant Superintendent Jaime R. Ayala and Fiscal Services Director Sosan Schaller presented the Second Interim Financial Report in detail (**EXHIBIT B**). Following the Second Interim Report, Mr. Ayala informed the District of three significant dates that are quickly approaching. In mid May, Governor Brown will release the May Revise. On May 19th, the District will present the 3rd Interim Financial Report for Board approval. This is required because of the qualified budget certification. Lastly, on June 16th, the District will present for approval the adoption of the 2011-12 Budget and multi-year projections through 2013-14.

5.0 PUBLIC HEARING *The public hearing was opened at 6:51p.m. and closed at 6:55 p.m.*

5.1 District Sunshine Proposal for Association of Colton Educators (ACE)

Assistant Superintendent Ingrid Munsterman announced the proposed articles for the district's sunshine.

Article 7 ~ Wages and Health and Welfare Benefits

The District intends to propose changes to Article 7 designed to enable the District to remain fiscally solvent during an unprecedented fiscal crisis. Such changes include, but are not limited to, salary roll back, furlough days, and other salary related cost-savings proposals. Additionally, the District intends to propose substantive changes to health and welfare benefits that may result in increased co-pays and deductibles, and changes to health and welfare benefits that result in increased member contributions. This list is not exhaustive and the District reserves the right to make additional proposals as negotiations progress.

Article 8 ~ Hours of Employment

The District intends to propose language designed to clarify article 8.2, Duty Hours, Assignments, including, but not limited to, clarification of the term "duty free." The District also intends to propose changes to article 8.2 as they relate to lesson plans.

With regard to Article 8.3, Evening Activities, the District intends to propose language geared toward clarifying and adding to evening duties.

With regard to Article 8.4, the District intends to propose language geared toward leveling ending times amongst the elementary grades.

This list is not exhaustive and the District reserves the right to make additional proposals as negotiations progress.

Article 9 ~ Class Size

The District intends to propose changes to Article 9 to provide increased flexibility/cost savings during this unprecedented fiscal crisis.

This list is not exhaustive and the District reserves the right to make additional proposals as negotiations progress.

The District is also reviewing other provisions of the Collective Bargaining Agreement. Additional subjects of meeting and negotiating arising after the presentation of this initial proposal shall be made public within 24 hours pursuant to Government Code 3547(d).

Due to continued fiscal challenges within the State of California, our task ahead is a formidable one. The District looks forward to participating in honest, forthright, and purposeful negotiations in addressing these challenges.

6.0 PUBLIC COMMENT

6.1 Blue card—Specific Consent, Action, Study & Information or Closed Session Item

- Nick Ramirez, CSEA president, spoke in favor of Action Item B-2, *Approval of Stipend for the Director of Transportation for Taking on Additional Combined Duties of Director of Risk Management and Health Benefits*. Mr. Ramirez also commented on the proposed SERP, although the classified bargaining members would like to participate in a SERP, they understand the district's recommendation to offer the SERP to certificated employees only.

White card—Items/Topics Not on the Agenda:

- Sean Davis, CHS counselor, spoke in opposition of the 2011-12 Fiscal Recovery Plan, Part I, as approved by the board.
- Christine Irish-Re, community member, commented on the improvements made to Colton High School's physical education class. She also suggested improvements for physical education at Bloomington High School.

7.0 ACTION SESSION

A. #348 Consent Items

On motion of Board Member Armenta and Board Member Cenicerros, and carried on a 7-0 vote, the Board approved Consent Items A-1 through A-8.

- #348.1 A-1 Approved Meeting Minutes for March 3, 2011
- #348.2 A-2 Approved Contract with Sharon S. Robison, Ed.D for a Board/Superintendent Workshop
- #348.3 A-3 Approved Student Field Trips (**EXHIBIT C**)
- #348.4 A-4 Approved Consultants for Assembly Presentations (**EXHIBIT D**)
- #348.5 A-5 Approved Consultants for Staff Development (**EXHIBIT E**)
- #348.6 A-6 Approved Update to Recommended Core and Extended Literature Readings and Videos, Grades 7-12
- #348.7 A-7 Approved a Three (3) Year Agreement with the San Bernardino County Superintendent of Schools for The Direct Certification of Free and Reduced Meal Applications – Confidential Treatment: July 2011 – June 2014
- #348.8 A-8 Accepted Gifts (**EXHIBIT F**)

B. Action Items

#349 On motion of Board Member Armenta and Board Member Kowalski, and carried on a 6-1 vote, the Board approved Action Items B-1 through B-17 and B-19 as presented. Action Item B-18 was withdrawn by the District.

- #349.1 B-1 Approved Personnel Employment and Resignations (**EXHIBIT G**)
- #349.2 B-2 Approved Stipend for the Director of Transportation for Taking on Additional Combined Duties of Director of Risk Management and Health Benefits
- #349.3 B-3 Approved Conference Attendance (**EXHIBIT H**)
- #349.4 B-4 Approved Disbursements
- #349.5 B-5 Approved Purchase Orders
- #349.6 B-6 Approved 2010-11 Second Interim Financial Report with a Qualified Certification
- #349.7 B-7 Adopted Resolution No. 11-46 for 2011-12 Temporary Borrowing from the County of San Bernardino Auditor/Controller-Recorder's Office
- #349.8 B-8 Awarded Request for Proposal (RFP) – Textbook/Library Book Management Software (Follett Software Company)
- #349.9 B-9 Adopted Resolution No. 11-45 Giving Notice of Intention to Grant A Right of Way to the City of Grand Terrace at Grand Terrace High School
- #349.10 B-10 Approved Right of Entry Agreement Between Colton JUSD and County of San Bernardino for Street Improvements at Bloomington High School
- #349.11 B-11 Approved to File a Notice of Completion for Bid #10-07 for the Colton High School New Math and Science Building Demolition Package and Driveway Project (Project 1F) – ASR Constructors, Inc.
- #349.12 B-12 Approved Subcontractor Substitution for Queen City Glass Company (Category 12) for the Grand Terrace High School Project, Bid #08-14
- #349.13 B-13 Adopted Resolution No. 11-50 Ratifying Prior Board Authorization to Execute and Deliver a Site Lease, Sublease and Construction Services Agreement and Other Acts Relating to the Construction of the New Middle School #5 Project
- #349.14 B-14 Adopted Resolution No. 11-51 Ratifying Prior Board Authorization to Execute and Deliver a Site Lease, Sublease and Construction Services Agreement and Other Acts Relating to the Construction of the Colton High School Math & Science Building Project
- #349.15 B-15 Adopted Resolution No. 11-52, Authorizing the Implementation of a Supplemental Employee Retirement Program (SERP) for Eligible Employees Retiring by June 30, 2011 (Plan to be Administered by Keenan & Associates)
- #349.16 B-16 Approved to Use California Multiple Award Schedule (CMAS) to Procure Telecommunications Products and Services Contingent upon Receipt of E-Rate 14 Funding
- #349.17 B-17 Approved to Award the Contract to Gaggle.net, Inc. to Provide Managed Student E-Mail Services
- ~~#349.18 B-18 Approval to Award the Contract to Provide Cabling and Local Area Network/Wide Area Network (LAN/WAN) Electronics Basic Maintenance Services Contingent to Network Infrastructure Partners (NIC) upon Receipt of E Rate 14 Funding~~
- #349.18 B-19 Approved to Award the Contract for Web-Hosting Services to Thing Ed Professional Services for District, School Site and Classroom Web Services

C. Action Items – Board Policy ~ None

D. Action Items – Resolutions

#350 On motion of Board Member Taylor and Board Member Cenicerros, and carried on a 7-0 vote, the Board approved Action Item D-1 through D-3, as presented.

- #350.1 D-1 Adopted Resolution No. 11-43, *Cesar E. Chavez Day*, March 31, 2011
- #350.2 D-2 Adopted Resolution No. 11-47 *Labor History Month*, April 2011

8.0 ADMINISTRATIVE REPORTS

- AR-8.1 Approved Change Orders Since January 13, 2011 for the Grand Terrace High School Construction Project per Board Resolution No. 10-20
- AR-8.2 Approved Change Orders for the Bloomington High School New Math & Science Building Project (Project 1E) per Board Resolution No. 10-20
- AR-8.3 Approved Change Orders for the Colton High School New Math & Science Building Project (Project 1F) per Board Resolution No. 10-20
- AR-8.4 Approval of Proposed Amendment of Administrative Regulation:
 - AR 5132 Dress Code
 - BP 5117 Inter-District Attendance
 - AR 5117 Inter-District Attendance
 - BP 5118 Open Enrollment Act Transfers (New)
 - AR 5118 Open Enrollment Act Transfers (New)

AR-8.5 **Budget Update** ~ presented under Administrative Report

AR-8.6 **Facilities Update**
Facilities Director Darryl Taylor presented the Project Update (**EXHIBIT 1**). He also reported that Mike De Vries, Vanir Construction Management, will be at the April 7th meeting to provide an update on the Grand Terrace High School project.

- AR-8.7 **Budget Subcommittee Update** ~ No Update
- AR-8.8 **Curriculum Subcommittee Update** ~ No Update
- AR-8.9 **Facilities Subcommittee Update** ~ No Update
- AR-8.10 **ACE Representative** No Report
- AR-8.11 **CSEA Representative**

CSEA President Nick Ramirez commented on the SERP, encouraging that the District closely manage the process to ensure the SERP provides the District with the maximum savings. He thanked Board Member Tabera for attending a recent CSEA chapter meeting and announced that CSEA is scheduled to begin negotiations on March 31st. Lastly, Mr. Ramirez promoted CSEA’s upcoming Cinco de Mayo fundraiser on May 7th. CSEA plans to host a Latino comedy night, Mariachi concert and car show at Colton High School.

AR-8.12 **MAC Representative**

President Katie Orloff announced the applications for the APPLE Scholarship Foundation are available at applescholarship.com. The scholarship is available to all CJUSD graduating seniors and children and grandchildren of District employees. All applications must be submitted by April 30th.

AR-8.13 **ROP Update**

Board Member Ibarra announced that ROP will offer a new LVN program that is scheduled to begin in July. He also announced the ROP is planning a campus tour for all board members, including alternates, on April 12th. Lastly, Mr. Ibarra informed the Board of the plan to host a graduation ceremony for ROP graduates. This will be the first graduation ceremony for ROP and is scheduled to take place at Redlands East Valley High School.

9.0 SUPERINTENDENT’S COMMUNICATION

Superintendent Almendarez proudly announced that Colton Joint Unified School District has been identified as the top candidate for the “AP Equity and Excellence District of the Year” award, presented by the College Board. The College Board has reported that CJUSD has shown an increase in student participation in AP by 14%, increased percentage of students earning scores of 3 or higher from 24% to 37% and an increase in the percentage of underserved minority students from 19% to 34%. No other district, of similar size, has achieved greater improvement in equity and performance in the past two years. Continuing with the good news, Mr. Almendarez shared that the District’s SARB was named a ‘Model SARB by the state for the 2nd year in a row. He thanked Assistant Superintendent Mike Snellings, Director Todd Beal, and Coordinator Amanda Corridan. Other (note worthy) events include, Spring Intersession Academy at BMS, NASA Explorer School Robotics Competition at Sycamore Hills Elementary School, Read Across America – districtwide, NASCAR Fuel for Success and National AVID demonstration validation visit at ROHMS.

To view the Communiqué please visit the CJUSD website at www.colton.k12.ca.us

10.0 BOARD MEMBER COMMENTS

Board Member Kowalski commented on a recent tour of Grand Terrace High School. He vowed that as the Board faces budgetary challenges and difficult decisions, he will continue to make responsible decisions, even if they are unpopular.

Board Member Taylor congratulated all high school advance placement teachers, as well as, high school administration for the recent honor by the College Board. He also thanked Assistant Superintendent Mike Snellings, Director Todd Beal, and Coordinator Amanda Corridan for their leadership and model SARB recognition.

Board Member Armenta announced that the District is co-sponsoring the upcoming Best Practices in Creating

Safe & Accepting Schools for Lesbian, Gay, Bisexual and Transgender (LGBT) Students conference on Saturday, April 9, 2011, at UC Riverside. The conference is for K-12 educators, counselors and administrators and is free for all to attend.

Board Member Cenicerros remarked on the AP recognition from the College Board. He also commented on the Colton High School varsity football ring ceremony. Mr. Cenicerros, with Board consensus, also requested that the District display current CIF championship team pictures in the Board Room.

Board Member Tabera ~ *No comment*

Board Member Ibarra spoke of the need for youth sports to be informed and accountable for field usage. Mr. Ibarra commented on Colton High School's participation in the track and field competition in Palm Springs. He also encouraged the District to promote CJUSD academic and athletic achievements. Mr. Ibarra congratulated the high school AP teachers. Lastly, he requested information on the *request for transcript* process.

Board Member Haro congratulated all school sites on their successful and well-attended Read Across America events. Mrs. Haro commented on CHS's varsity football ring ceremony and the National Junior Honor Society induction ceremony at ROHMS. She thanked Colton Mayor David Zamora, Colton city council and San Bernardino County Supervisor Josie Gonzales for their support of Rogers elementary school's safe zone and commented on the ribbon cutting ceremony. Mrs. Haro updated the Board on BHS's wrestling competition in Bakersfield and wished the team and coaching staff continued success. She requested that letters of appreciation be sent to all AP teachers and congratulated the Student Services Division on their SARB recognition. Mrs. Haro closed her comments by asking the public to keep Jacob Gutierrez and his family in mind. Jacob is a freshman at BHS who was hit by a car earlier in the week and now lies in critical condition at Arrowhead Regional Medical Center.

11.0 CLOSED SESSION Following action items: Board Room, Student Services Center, 851 So. Mt. Vernon Ave., Colton, CA (Government Code 54950 et seq.)

At 8:13 p.m., Board President Haro announced that the board would recess to closed session to discuss the following items on the closed session agenda:

- 11.1 • Student Discipline, Revocation and Re-entry
- 11.2 • Personnel
- 11.3 • Conference with Legal Counsel—Anticipated Litigation
- 11.4 • Conference with Legal Counsel—Existing Litigation
- 11.5 • Conference with Real Property Negotiator

12.0 PUBLIC SESSION – ACTION REPORTED FROM CLOSED SESSION

The Board meeting reconvened at 9:57 p.m. Board President Haro reported on action taken in closed session.

#351 12.1 Student Discipline, Revocation, and Re-entry

#351.1 On motion of Board Members Taylor and Kowalski and a 7-0 vote, the Board approved student discipline items 1-6 as presented.

- | | |
|-----------|------------|
| 1. 132081 | 4. 94803 |
| 2. 117848 | 5. 83094 |
| 3. 125100 | 6. 1035600 |

12.2 Personnel

♦ Public Employee: Discipline/Dismissal/Employment/Release/Reassignment (Gov. Code 54957) ~ *None*

12.3 Conference with Legal Counsel—Anticipated Litigation

Significant exposure to litigation pursuant to Government Code Section 54956.9(b)
Potential Case: *None*

12.4 Conference with Legal Counsel—Existing Litigation

Pursuant to Government Code Section 54956.9(a)
Case Number: *None*

12.5 Conference with Labor Negotiator

Agency:

Ingrid Munsterman, Assistant Superintendent, Human Resources Division

Employee Organizations:

Association of Colton Educators (ACE)

California School Employees' Assoc. (CSEA)

Management Association of Colton (MAC)

12.6 Conference with Real Property Negotiator (Gov. Code 54956.8)

Property: ~*None*~

13.0 ADJOURNMENT

At 9:58 p.m., the meeting was adjourned until the next Board of Education Meeting scheduled for Thursday, April 7, 2011, at the Colton JUSD Student Services Center, 851 South Mt. Vernon Avenue, Colton, California.

EXHIBIT A: SERP Update




Certificated / Certificated Management
March 2011

Lic. No. 0451271
Keenan & Associates

Innovative Solutions. Enduring Principles.



What is SERP?

A Keenan Solution

- Supplemental Employee Retirement Plan
- Provides monthly retirement income benefits to you
- Income is in addition to CalSTRS or CalPERS benefits

Lic. No. 0451271
Keenan & Associates

Innovative Solutions. Enduring Principles.



Facts & SERP Advantages

- CalSTRS or CalPERS is your primary source of income
- Start enjoying retirement early
- Reduce the need to work longer to increase the lifetime pension benefit
- Provides current supplemental income, allowing your other investments to gain back stock market losses
- Market downturn does not affect your CalSTRS or CalPERS or SERP pension benefit

Lic. No. 0451271
Keenan & Associates

Innovative Solutions. Enduring Principles.



Facts & SERP Advantages

- Financial bridge between working & retirement:
 - Retirement is among the Top 10 most stressful life changes
 - Attend an Individual Counseling Session
 - Our Counselors are retired school employees
 - Provide insight into life after retirement
- Flexible payment options to protect spouse or other loved ones

Lic. No. 0451271
Keenan & Associates

Innovative Solutions. Enduring Principles.



Facts & SERP Advantages

- If income is not needed, roll into a traditional IRA, defer income taxes, and allow for tax deferred growth
- SERP allows for accelerated payment of benefits compared to the CalSTRS Golden Handshake
- May return to service with CalSTRS*
- SERP costs you NOTHING

* NOTE: As of July 1, 2010, Assembly Bill (AB) 506 restricts CalSTRS retirees ages 59 and below from returning to work for 6 months

Lic. No. 0451271
Keenan & Associates

Innovative Solutions. Enduring Principles.



Colton Joint Unified School District Summary Sheet

Classification	Plan Type	Number of Eligible	Annual Amount	Projected % of Eligible	Projected % of Eligible	Average Salary	Average Salary	Plan Cost %	Average Cost Per Annum	Average Plan Savings per Employee	Total Projected Savings	Savings with No Plan	Total Projected Net Savings	First Year Annual Net Savings
Certificated	50% of Salary (SERP) with BEC - 3 and employer	209	8	35	10%	\$77,290	\$100.80	\$1,203.71	\$77,290	\$40,751	\$1,861,282	\$1,071,263	\$1,895,917	\$897,674
Certificated Management	50% of Salary (SERP) with BEC - 1 and employer	13	1	6	27%	\$120,360	\$102.72	\$1,874.67	\$120,360	\$48,861	\$191,619	\$109,163	\$26,294	\$16,791
Certificated	50% of Salary (SERP) with BEC - 2 and employer	472	0	15	12%	\$63,554	\$119.26	\$492.29	\$121,024	\$221,967	\$109,204	\$14,210	\$105,643	\$40,648
Certificated Management	50% of Salary (SERP) with BEC - 0 and employer	12	1	1	0%	\$74,620	\$162.17	\$1,147.18	\$74,620	\$16,627	\$101,627	\$101,627	\$74,620	\$14,764
Total with BEC		418	10	41	30%	\$75,991					\$1,672,900	\$1,212,223	\$144,633	

Lic. No. 0451271
Keenan & Associates



EXHIBIT A: SERP Update

Example: Income Benefit Options

Example: Certificated Non-Management Employee - Age 59
Benefits Based on 100% of Salary \$77,920 with Health Benefits

	MONTHLY ALTERNATIVE	BENEFIT
A	Life Only Benefit	\$380.80
B	Joint & 50% Survivor	\$352.76
C	Life or Ten (10) Years, <i>whichever is longer</i>	\$372.33
D	Five (5) Year Monthly Payments*	\$1,205.71
E	Six (6) Year Monthly Payments*	\$1,026.04
F	Seven (7) Year Monthly Payments*	\$897.88
G	Eight (8) Year Monthly Payments*	\$803.42
H	Nine (9) Year Monthly Payments*	\$729.04
I	Ten (10) Year Monthly Payments	\$669.75

* Eligible for IRA tax deferred rollover. Mandatory 20% federal tax applies to benefits not rolled over.
Acceptance of your application to participate in the Supplemental Employee Retirement Plan (SERP) is contingent on the District's verification of eligibility.
Annuity benefits are provided by an insurance company and quoted amounts are estimates only. Estimated benefits are subject to change prior to actual purchase of annuity benefits. Estimated benefits may change due to changes in the data supplied by the District, changes in current interest rates, mortality assumptions, commission percentages and Iowa premium tax. The District may be subject to penalty fees for late premium payments and benefits may cease if all installment premiums are not paid in accordance with the installment premium schedule.

Lic. No. 0451271
Keenan & Associates

Innovative Solutions. Enduring Principles.



Eligibility Guidelines

1. Employee must be a Contracted Certificated or Certificated Management Employee of the Colton Joint Unified School District
2. Employee must be at least 55 years of age by June 30, 2011
3. Employee must have at least 5 consecutive years of service with the District and actively employed with the District as of May 2, 2011
4. Employee must be eligible to retire from CalSTRS by June 30, 2011

Lic. No. 0451271
Keenan & Associates

Innovative Solutions. Enduring Principles.



Eligibility Guidelines - continued

5. Retirement date must be effective no later than June 30, 2011
6. Letter of resignation and SERP enrollment package must be hand delivered to Human Resources by close of business on May 2, 2011
7. Implementation of the SERP will be determined by the savings analysis reviewed by the Business Office on May 10, 2011

Lic. No. 0451271
Keenan & Associates

Innovative Solutions. Enduring Principles.



Colton Joint Unified School District Certificated (Non-management) & Certificated Management 2011 Year-End Timeline	
January / February 2011	Discussions w/ Management Team, Board & Associations
January 13, 2011	Board Workshop (Closed Session)
March 17, 2011	Board Approval (Window Period Opens)
March 23, 2011	Announcement Letters to eligible employee by District
March 29 – 31, 2011	Group Orientation Meetings
April 4 – 7, 2011 April 11 – 14, 2011	Individual Counseling Sessions
May 2, 2011	SERP Enrollment Forms & Letters of Resignation due (SERP Window Period Closes)
May 9, 2011	Last Day to Rescind Resignation
May 10, 2011	Savings Verified by Business Office
June 30, 2011	SERP Participants retire from District
July 1, 2011	Plan Effective Date
August 1, 2011	First Benefit Payment

Any questions?

Thank you!

Keenan & Associates and its employees or representatives do not provide personal accounting, tax, or legal advice.

Lic. No. 0451271
Keenan & Associates

Innovative Solutions. Enduring Principles.



EXHIBIT B: Budget Update

Second Interim Financial Report Multi-year Projection 2010-11



Colton Joint Unified School District
March 17, 2011

What is Multi-year & Why?

- Current + Two Subsequent Years
- Based on Projections NOT Forecasts
- Expect Change as Factors Change
- Assembly Bill (AB) 1200
 - Passed in 1991 for Fiscal Accountability
 - School District Bankruptcy Prevention
- Assembly Bill (AB) 2756
 - Passed in 2004 after Oakland and Vallejo Bankruptcies
 - Broaden State and County Authority

Multi-Year Projection Factors

- County Template
 - Revenue Limit
 - Other Revenues
 - Expenditures
 - Enrollment & Staffing
- School Services of California & County Supt. Of Schools
 - COLA
 - Deficit
 - California Price Index (CPI)
 - Lottery Rate
- Certificated Classroom Staffing Level
 - Enrollment Projection
 - Class-size per Contract

Multi-Year Revenue Projection

- Revenue Limit Projection
 - Projected ADA or Prior-year Guarantee
 - COLA
 - Equalization if Applicable
 - Deficit if Applicable
 - All other Governor's Proposals
- Other Revenues
 - Current Year as Base
 - Deduct One-time Revenues in the Base
 - COLA to Categorical Programs
 - New Rates if Applicable
 - Projected Enrollment Change

Revenues ↓ by \$20 million

Description	2010-11 2nd Interim Budget	2011-12 Projected Budget	2012-13 Projected Budget
Total, Revenues:	\$ 184,759,421	\$ 164,476,619	\$ 162,708,048
Total, Expenditures:	\$ 189,431,448	\$ 183,955,236	\$ 190,325,417
Net Inc. (Dec.) in Fund Balance	\$ (4,672,028)	\$ (19,478,617)	\$ (27,617,369)
Beginning Balance July 1	\$ 29,126,263	\$ 24,454,235	\$ 4,975,618
Ending Balance	\$ 24,454,235	\$ 4,975,618	\$ (22,641,751)

Revenue Limit

2010-11 Revenue Limit (22,202 ADA)	\$116,855,735
Projected 2010-11 P-2 ADA (22,173 ADA)	(\$156,975)
Deficit Increase \$19/ADA	(\$414,466)
Tax Extensions \$330/ADA	(\$7,198,668)
2011-12 Projected Revenue Limit	\$109,085,626

EXHIBIT B: Budget Update

Federal Revenues

2010-11 Federal Revenues	\$21,557,562
2009-10 Federal Grant Carryovers	(\$2,904,352)
Education Technology ARRA funds	(\$107,111)
Education Jobs ARRA funds	(\$3,939,771)
Medical Admin Activities (MAA)	(\$101,487)
Title I ARRA	(\$149,706)
State Fiscal Stabilization Fund (Final 10%)	(\$1,059,292)
2011-12 Projected Federal Revenues	\$13,295,843

Other State Revenues

2010-11 Other State Revenues	\$30,439,139
2009-10 State Grant Carryovers	(\$1,450,664)
Lottery	(\$38,943)
Class-size Reduction	(\$65,950)
Special Ed Settlement Payment (sunsets 2011)	(\$89,400)
2011-12 Projected Other State Revenues	\$28,794,182

Other Local Revenue

2010-11 Other Local Revenues	\$10,296,001
2009-10 Local Grant Carryovers	(\$33,878)
Special Education Growth	(\$197,673)
Special Disabilities Allowance (sunsets 2011)	(\$263,481)
2011-12 Projected Other Local Revenues	\$9,800,969

Expenditures ↓ by \$5 million

Description	2010-11	2011-12	2012-13
	2nd Interim Budget	Projected Budget	Projected Budget
Total Revenues:	\$ 184,739,421	\$ 164,476,619	\$ 162,708,048
Total Expenditures:	\$ 189,431,449	\$ 183,955,236	\$ 190,325,417
Net Inc. (Dec.) in Fund Balance	\$ (4,672,028)	\$ (19,478,617)	\$ (27,617,369)
Beginning Balance July 1	\$ 29,126,263	\$ 24,454,235	\$ 4,975,618
Ending Balance	\$ 24,454,235	\$ 4,975,618	\$ (22,641,751)

Multi-Year Expenditure Projection

- **Certificated & Classified Salaries**
 - Current Year as Base
 - Step & Column Costs
 - Classroom Staffing per Enrollment Projection
 - Adjust One-time Expenditures
 - Board Approved Adjustments to Salary/Program
- **Employee Benefits**
 - Current Year as Base
 - Step & Column Statutory Benefits
 - Staffing Change Statutory Benefits
 - Health Benefits' Premium Rates Change
 - Add New Expenditures
 - Adjust One-time Expenditures

Multi-Year Expenditure Projection

- **Books & Supplies, Services, Capital Outlay**
 - Current Year as Base
 - Deduct One-time Expenditures
 - Utility Rate Change
 - Governor's Proposals
 - Board Approved Budget Adjustments
- **Other Outgo & Financing Uses**
 - Current Year as Base
 - Governor's Proposals
 - Debt Issuance

EXHIBIT B: Budget Update

Certificated Salaries

2010-11 Certificated Salaries (2nd Interim)	\$93,827,489
2011-12 Projected Step & Column (ACE)	\$1,307,988
2011-12 Projected Step (Management)	\$136,922
Classroom Staffing Change	(\$307,443)
Board Approved Budget Reductions	(\$1,523,852)
2011-12 Projected Certificated Salaries	\$93,441,104

Classified Salaries

2010-11 Classified Salaries (2nd Interim)	\$28,285,785
2011-12 Projected Step (CSEA)	\$347,989
2011-12 Projected Step (Management)	\$49,525
Board Approved Budget Reductions	(\$593,961)
2011-12 Projected Classified Salaries	\$28,089,338

Employee Benefits

2010-11 Employee Benefits (2nd Interim)	\$37,087,749
2011-12 Step & Column Statutory Benefits	\$237,283
2011-12 Classroom Staffing Change Benefits	(\$232,633)
2011-12 Health Premium Rate Change	\$585,527
Board Approved Budget Reductions	(\$315,300)
2011-12 Projected Employee Benefits	\$37,362,626

Books & Supplies

2010-11 Books & Supplies (2nd Interim)	\$9,295,108
One-time Expenditures (carryovers & ARRA)	(\$1,662,255)
Board Approved Budget Reductions	(\$750,500)
2011-12 Projected Books & Supplies	\$6,882,353

Services & Other Operating Expenditures

2010-11 Services & Other Operating Exp (2nd Interim)	\$16,005,312
One-time Expenditures (carryovers & ARRA)	(\$184,405)
Increases for California Price Index 1.7%	\$63,830
AB 3632 Special Education Mental Health	\$467,326
Board Approved Budget Reductions	(\$459,882)
2011-12 Projected Services & Other Operating Exp	\$15,892,181

Capital Outlay

2010-11 Capital Outlay (2nd Interim)	\$787,777
One-time Expenditures (Special Ed buses & ARRA)	(\$573,177)
Increases for California Price Index 1.7%	\$13,392
2011-12 Projected Capital Outlay	\$227,992

EXHIBIT B: Budget Update

Other Financing Uses

2010-11 Other Financing Uses (2nd Interim)	\$2,082,587
Board Approved Elimination of Adult Education	(\$381,169)
Eliminate Contribution to Deferred Maintenance	(\$1,701,418)
2011-12 Projected Other Financing Uses	\$0

Projected Ending Fund Balance

Description	2010-11 2nd Interim Budget	2011-12 Projected Budget	2012-13 Projected Budget
Total Revenues:	\$ 184,759,421	\$ 164,476,619	\$ 162,708,048
Total Expenditures:	\$ 189,431,449	\$ 183,955,236	\$ 190,325,417
Net Inc. (Dec.) in Fund Balance	\$ (4,672,028)	\$ (19,478,617)	\$ (27,617,369)
Beginning Balance July 1	\$ 29,126,263	\$ 24,454,235	\$ 4,975,618
Ending Balance	\$ 24,454,235	\$ 4,975,618	\$ (22,641,751)

- ### Significant Dates...
- Mid-May
 - Governor's May Revise
 - May 19th Board Meeting
 - 3rd. Interim Financial Report
 - June 16th Board Meeting
 - Adoption of the 2011-12 Budget
 - Multi-year through 2013-14

Questions?

March 17, 2011 Board Meeting Minutes
EXHIBIT C, FIELD TRIPS:

Site	Date	Depart	Return	Destination	Activity/Background	Grade	Teacher	Cost	Funding	Strategic Plan*
Wilson	4/11/11 to 4/15/11 (M-F)	9:30 am	12 noon	Forest Center Forest Falls, CA (District transportation)	<i>Outdoor Science School</i> Sixth grade students will participate in a hands-on life science education in the natural environment.	6	Christine Bravo Art Rungo Manuel Flores (50 students) + camp chaperones	\$320 (Transport only) Field trip funded by Orange County Dept of Education	Donation	Strategy #1
BHS	4/15/11 to 4/19/11 (F/S/S/ M/T)	7:30 am	7 pm	Piccadilly Inn Shaw Fresno, CA (District transportation)	<i>State FFA Leadership Conference & Field Day</i> FFA students will participate in leadership development activities and explore the many career opportunities within the agriculture industry.	12	Desiree Trapp Richard Montgomery (12)	\$5,980	Perkins	Strategy #1
THMS	5/7/11 (Sat)	8 am	9 pm	Disneyland Anaheim, CA (District transportation)	<i>End of Year Activity</i> AVID, ASB and NJHS students will participate in an end of the year academic incentive trip.	7-8	Lauren Rumpf Diane Brown Lauren Tyler Kelli Gudgeon (100) +6	\$7,700	ASB	Strategy #1
Grimes	5/25/11 to 5/26/11 (W/Th)	12:30 pm	4:30 pm	San Diego Wild Animal Park Escondido, CA (District transportation)	<i>San Diego Zoo Safari Park</i> Students will have hands on experiences in the natural environment and reinforcing 6 th grade earth science grade level standards.	6	Ilene Mino Johnny Duran Denise Ramirez (83) + camp chaperones	\$13,340 (\$100) (\$4,000) (\$7,040) (\$2,200)	PTA ASB Discretion Donations	Strategy #1

EXHIBIT D, CONSULTANTS FOR ASSEMBLY PRESENTATION

Site	Date(s)	Time	Program/Purpose	Location	Consultant(s)	Cost	Funds	Strategic Plan*
Grant	4/13/11	9:30 to 11:30	<i>Giddy up Ranch</i> Kindergarten students will observe and describe similarities and differences in the appearance and behavior of plants and animals. The program reinforces K grade level standards in science.	Grant	Giddy Up Ranch Phelan, CA	\$450	Boosters	Strategy #1
Rogers	4/15/11	10 am to 1:45 pm	<i>TESTING.... TESTING... 123</i> To provide students in grades K-6 encouragement and guidance in test taking strategies.	Rogers	Open Window Entertainment Los Angeles, CA	\$1,250	Title I	Strategy #1
Wilson	5/4/11	9:15 am & 10:15 am	<i>Dances of the Aztec</i> K-6 students will learn about the ancient traditions of the Aztec people through story, music and dance.	Wilson	Orange County Performing Arts Center Costa Mesa, CA	\$905	SLI	Strategy #1
Grant	5/19/11	8:30 am	<i>History Brought to Life</i> Fourth grade students will study the California missions and the Gold Rush of 1849. The program reinforces the 4 th grade history standards.	Grant	History Brought to Life Joel Greene Rancho Cucamonga, CA	\$650	Boosters	Strategy #1

EXHIBIT E, CONSULTANTS FOR STAFF DEVELOPMENT

Site	Date	Time	Program/Purpose	Location	Consultant(s)	Cost	Funds	Strategic Plan*
District Office	3/23/11 to 3/27/11	7:45 am to 3 pm	<i>Language! 4</i> To provide K-12 teachers five-day training designed to implement the <i>LANGUAGE! 4</i> reading program to increase student achievement.	District Office/Bldg. M	Cambian Education, Inc. Chicago, IL	\$12,500	Title I	Strategy #2 #5
CMS	4/5, 6, 7, 8, & 12, 2011 (+ 3 afterschool sessions included in the above 5 days)	8 am to 2:58 pm	<i>Explicit Direct Instruction Professional Development</i> Training will focus on direct instruction, improve student engagement, standards-based instruction strategies, build staff capacity and increase student achievement.	CMS	A2Z Educational Consultants, Inc. Hayward, CA 94542	\$12,250	QEIA	Strategy #2 #5

EXHIBIT F, GIFTS

Site	Donor	Donation/Purpose	Amount
Bloomington High	Ashley Furniture One Ashley Way Arcadia, WI 54612	Check #825689 For BHS Football Club	\$200.00
Bloomington High	Bloomington Little League P.O. Box 131 Bloomington, CA 92316	Check #1189 For BHS Softball Club	\$500.00
Bloomington High	California Teachers Association Foundation for Teaching & Learning 1705 Murchison Drive Burlingame, CA 94010	Check #344 For GSA Club	\$1,000.00
Bloomington High	Kiwanis Club-Cooley Ranch 347 North La Cadena Drive Colton, CA 92324	Check #2087 For Key Club	\$1,000.00
Bloomington High	Robert Carl Bridges II 5545 Grand Avenue Riverside, CA 92504	Check #131 Bish Memorial Scholarship Fund	\$500.00
Bloomington High	Robertson's Transport P.O. Box 3600 Corona, CA 92878-3600	Check #61506 For Navy Club	\$150.00
Bloomington High	The Sport Foundation 4444 Magnolia Avenue Riverside, CA 92501	Check #60652 For BHS Athletics Clubs	\$50.00
Colton High	Susie Barrios 11968 Limestone Court Yucaipa, CA 92399	Cash For Cheer Competition in Anaheim	\$515.00
Colton High	Andrea Padilla 1713 Watwood Avenue Colton, CA 92324	Cash For Cheer Competition in Anaheim	\$535.00
Colton High	Aram G. Sogomonian c/o Edison International Employee- Employee Contributions P.O. Box 3288 Princeton, NJ 08543-3288	Check #135884 CHS Sogomonian Family Scholarship	\$75.00
Colton High	Edison International-Edison Gifts P.O. Box 3288 Princeton, NJ 08543-3288	Check #159335 CHS Sogomonian Family Scholarship Company Match	\$75.00
Colton High	Nicolas Angeles Mulato 385 Grand Avenue Colton, CA 92324	Check #478 Boys Soccer	\$50.00
Colton High	Oleta's Distribution 4717 North F Street San Bernardino, CA 92407	Check #3020 Boys Soccer	\$300.00
Colton High	Richard Loder 650 North La Cadena Drive Colton, CA 92324	Check #0010360029 Girls Soccer	\$177.82
Colton High	Ashley Furniture One Ashley Way Arcadia, Wisconsin 54612	Check #836789 - \$250.00 Check #310904 - \$250.00 For Athletics	\$500.00
Cooley Ranch	Association of Colton Educators 190 West H Street #101 Colton, CA 92324	Check #7413 Awards & Incentives	\$200.00

Site	Donor	Donation/Purpose	Amount
D'Arcy	James Edward Harris c/o Edison International Employee Contributions P.O. Box 3288 Princeton, NJ 08543-3288	Check #136735	\$369.45
D'Arcy	Edison International-Edison Gifts P.O. Box 3288 Princeton, NJ 08543-3288	Check #159660 Company Match	\$369.45
Grimes	Edison International-Edison Gifts Contributions Campaign P.O. Box 3288 Princeton, NJ 08543-3288	Check #137146 For Alyssa Riddle	\$30.00
Grimes	Edison International- Edison Gifts P.O. Box 3288 Princeton, NJ 08543-3288	Check #159832 For Alyssa Riddle Company Match	\$30.00
Jurupa Vista	Jurupa Vista P.T.A. 15920 Village Drive East Fontana, CA 92337	Check# 1226 5 th Grade Field Trips	\$540.00
Jurupa Vista	Jurupa Vista P.T.A. 15920 Village Drive East Fontana, CA 92337	Check #1232	\$850.00
Lewis	Darrell Rosenbrock Maintenance & Operations 1212 Valencia Drive Colton, CA 92324	Cash-Marathon for books	\$210.00
Lewis	Darrell Rosenbrock Maintenance & Operations 1212 Valencia Drive Colton, CA 92324	Cash-Marathon for books	\$100.00
Lewis	Darrell Rosenbrock Maintenance & Operations 1212 Valencia Drive Colton, CA 92324	Cash-Marathon for books	\$50.00
Ruth O Harris	Coca-Cola Refreshments One Penn's Way New Castle, DE 19720	Check #05474918	\$34.63
Smith	Association of Colton Educators 190 West H Street #101 Colton, CA 92324	Check #7412 CST/Test Incentives	\$200.00
Wilson	Conquistadors Organization 12070 La Cadena Drive Grand Terrace, CA 92313	\$500.00 worth of clothes & school supplies for the 'Homeless Closet'	\$500.00
Wilson	Nellie Cortez 745 West K Street Colton, CA 92324	Check #172 Memory of Ray Abril Jr.	\$100.00
Wilson	David Holguin Elephant Bar 1050 East Harriman Place San Bernardino, CA 92408	Gift Cards for Students & Teacher Incentives	\$100.00
Wilson	Wildcats P.T.A. 750 South 8 th Street Colton, CA 92324	Check #1167 2 nd Grade Field Trip	\$622.00
Wilson	Wildcats P.T.A. 750 South 8 th Street Colton, CA 92324	For 2 Academic Pentathlon Teams Entry Fee	\$500.00
Wilson	Association of Colton Educators 190 West H Street #101 Colton, CA 92324	Check #7423 For Student Incentives/Awards	\$200.00

EXHIBIT G, PERSONNEL:

<u>I-A</u>	<u>Certificated – Regular Staff</u>	<u>Subject</u>	<u>Site</u>
	None		
<u>I-B</u>	<u>Certificated – Activity/Coaching Assignments</u>	<u>Position</u>	<u>Site</u>
	None		
<u>I-C</u>	<u>Certificated – Hourly</u>	<u>Position</u>	<u>Site</u>
	None		
<u>I-D</u>	<u>Certificated – Substitute Teacher</u>		
1.	Smith, Briana		
<u>II-A</u>	<u>Classified – Regular Staff</u>	<u>Position</u>	<u>Site</u>
	None		

<u>II-B</u>	<u>Classified – Activity/Coaching Assignments</u>	<u>Position</u>	<u>Site</u>
1.	Flores Jr., Robert J.	HD Varsity Softball	BHS
2.	Jorrin, Enoc	HD JV Baseball	CHS (walk-on, returning)
3.	Rodriguez, Ulysses	HD JV Baseball	BHS (walk-on, returning)
4.	Rossano Sr., Michael J.	HD JV Softball	BHS
<u>II-C</u>	<u>Classified – Classified Hourly</u>	<u>Position</u>	
1.	Barrasa, Delina	Sub Noon Aide	Jurupa Vista
2.	Luna, Silvia	Noon Aide	D'Arcy
<u>II-D</u>	<u>Classified Substitute</u>	<u>Position</u>	<u>Site</u>
	None		
<u>II-E</u>	<u>Classified – Short-Term – (effective 3/4/11 – 6/7/11)</u>	<u>Position</u>	<u>Site</u>
	None		

RESIGNATIONS:

	<u>Certificated Employee</u>	<u>Position</u>	<u>Site</u>	<u>Employment Date</u>	<u>Effective</u>	<u>Reason</u>
	<u>Classified Employee</u>	<u>Position</u>	<u>Site</u>	<u>Employment Date</u>	<u>Effective</u>	<u>Reason</u>
1.	Churchward, Andrea	Special Ed Inst. Asst.	CHS	09/23/1988	06/08/2011	Retirement
2.	Ramirez, Mary E.	Nutrition Services Worker I	Birney	09/25/1995	06/08/2011	Retirement

EXHIBIT H, CONFERENCES:

<u>Employee</u>	<u>Title</u>	<u>Site</u>	<u>Conference</u>	<u>Date/Location</u>	<u>Funds</u>
Cynthia Bachman	Psychologist	PPS	Mandated Psycho-Educational Assessment	March 30 – April 1, 2011 St. George, UT	Special Ed Funds: Not to exceed \$1,400



ACTIVE PROJECTS—construction and design

NEW SCHOOLS

PROJECT #11



GRAND TERRACE HIGH SCHOOL

TOTAL BUDGET: \$121 MILLION (Increment 1—Base Campus)
CONSTRUCTION: 44% COMPLETE

PROJECT #27



JOE BACA MIDDLE SCHOOL

TOTAL BUDGET: \$49.1 MILLION
CONSTRUCTION: 13% COMPLETE

NEW CLASSROOMS

PROJECT #1E



BLOOMINGTON HS MATH & SCIENCE BLDG

TOTAL BUDGET: \$15.1 MILLION
CONSTRUCTION: 52% COMPLETE

PROJECT #1F



COLTON HS MATH & SCIENCE BLDG

TOTAL BUDGET: \$18.6 MILLION
CONSTRUCTION: 3% COMPLETE

SMALL PROJECTS

#35

FIRE ALARM & COMMUNICATIONS UPGRADES AT WILSON, JURUPA VISTA, RECHE CANYON, BMS

TOTAL BUDGET: \$2.2 MILLION
CONSTRUCTION: 99% COMPLETE

#41

LEWIS ES—BASKETBALL COURTS ADDITION

TOTAL BUDGET: \$58,000
CONSTRUCTION: 95% COMPLETE

#38

BMS—BUILDING N CLASSROOM EGRESS

TOTAL BUDGET: \$66,000
CONSTRUCTION: 25% COMPLETE

#39

D'ARCY ES— SITE ACCESS AND SECURITY

TOTAL BUDGET: \$59,000
CONSTRUCTION: started 3/14/11

#47

BIRNEY ES- BUS DROP-OFF AND PARKING

TOTAL BUDGET: \$333,000
CONSTRUCTION: Summer 2011

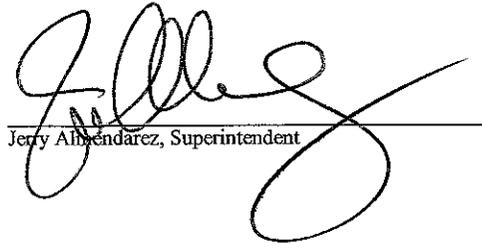
#37

CHS—PEDESTRIAN BRIDGE REPAIRS

TOTAL BUDGET: \$75,000
CONSTRUCTION: Summer 2011

Date Approved: April 7, 2010


Frank Ibarra, Clerk


Jerry Alvarado, Superintendent