

**HAPPY VALLEY SCHOOL DISTRICT
BOARD OF TRUSTEES
August 12, 2026
3:30 pm, Multi-Purpose Room
Regular Board Meeting
Agenda**

A. Approval of Agenda

B. Approval of Minutes- Regular Board Meeting, June 22, 2026

C. Community Input

Members of the audience are welcome to address the Board of Trustees at this time during the meeting regarding items not listed on this agenda. The Trustees may ask questions for clarity but cannot take action on those matters, if desired, until such matters are appropriately placed on a future agenda, according to law. Three minutes may be allotted to each speaker and a maximum of twenty minutes to each subject matter (Board bylaws 9323).

D. Board Report

E. Superintendent's Report

F. Information Items

1. Track Update

The Board will receive an update regarding the track.

2. Community Foundation

The Board will receive an update regarding the Happy Valley Endowment Fund.

3. Enrollment

The Board will receive information regarding Happy Valley's enrollment.

G. Action Items

1. Quarterly Status Report of Uniform Complaint

The Board will receive the 4th quarterly report of 2025/2026 Uniform Complaint related to the Williams Settlement.

2. Science Camp

The Board will consider approval of the 6th grade class attending Outdoor Science School (OSS) from October 26, 2026 through October 30, 2026.

3. ELOP Plan

The Board will consider approval of updated ELOP Plan.

4. Strategic Plan

The Board will consider of the Strategic Plan.

5. School Facility Program Close-Out Savings Audit Report

The Board will consider approval of the School Facility Program Close-Out Saving Audit Report from Harshwal and Company LLP.

6. AB 1200 Public Disclosure of Collective Bargaining Agreement with Happy Valley Education Association.

The Board will consider approval of the district's disclosure of the fiscal impact of the 2026-2028 Collective Bargaining Agreement over the relevant fiscal years.

7. Contract Agreement

The Board will consider approval of the Collective Bargaining Agreement for July 1, 2026 – June 30, 2028, with the Happy Valley Education Association.

8. Salary Schedule for Administrative Assistants

The Board will consider approval of a 3% increase effective July 1, 2026, to the following salary schedules:

1. Classified CLONF-Administrative Assistant, Confidential
2. Classified CLADASST- Administrative Assistant 1

9. Salary Schedule for Speech Teacher

The Board will consider approval of a 3% increase effective July 1, 2026, to the CE Speech salary schedule.

10. 2026-2027 45 Day Budget Revision

The Board will consider approval of the 2026-2027 45 day budget revision.

H. Consent Items

1. Approval of BP 5117
2. Approval of Proposal for Technology Services
3. Approval of vendor warrants paid since last meeting

I. Communications and Announcements

1. Aug. 26- Picture Day, 8:30 am, Stage
2. Aug. 28- Peacebuilder Assembly, 11:35 am, Stage
3. Sept. 7- No School, Labor Day
4. Sept. 9- Board Meeting, 3:30 pm, MPR

J. Adjournment

Happy Valley School District
Regular Board Meeting
June 22, 2026
MINUTES

The meeting was called to order by the Board Clerk at 9:01am

BOARD MEMBERS PRESENT: Willet, Freeman, Yegge, Stahl

BOARD MEMBERS ABSENT: Hodges

STAFF MEMBERS PRESENT: Stewart

- A. APPROVAL OF THE AGENDA
MSC STAHL/YEGGE to approve the Board Meeting agenda as written. Unanimous.
- B. APPROVAL OF THE MINUTES
MSC STAHL/YEGGE to approve the minutes from the Regular Board Meeting June 17, 2026. Unanimous.
- C. APPROVAL OF THE MINUTES
MSC STAHL/YEGGE to approve the minutes from the Regular Board Meeting June 10, 2026. Unanimous.
- C. COMMUNITY INPUT
None.
- D. BOARD REPORT
None.
- E. SUPERINTENDENT'S REPORT
The Superintendent looked into converting policies to SSDA. It will be brought back in the future after further review.
- F. ACTION ITEMS
 - 1. APPROVAL OF THE 2026-2027 LCAP
MSC FREEMAN/STAHL to approve the 2026-2027 LCAP, which includes LCFF Budget Overview for Parents. Unanimous.
 - 2. LOCAL INDICATORS
MSC STAHL/FREEMAN to approve the Local Indicators. Unanimous.
 - 3. APPROVAL OF THE 2026-2027 BUDGET
MSC FREEMAN/STAHL to approve the 2026-2027 budget. Unanimous.
- G. CONSENT ITEMS
MSC FREEMAN/YEGGE to approve the following consent items:
 - 1. MOU with Scotts Valley Unified School District, Title III. Unanimous.
 - 2. Contract with Ohlsen Foods for the 2026-2027 school year. Unanimous.

3. Vendor warrants paid since last meeting. Unanimous.

H. COMMUNICATION AND ANNOUNCEMENTS

1. August 12, 2026 - First Day of School
2. August 12, 2026 - Board Meeting, 3:30pm, MPR
3. August 26, 2026 - Picture Day, 8:30am, Stage

I. CLOSED SESSION

The Board adjourned into closed session at 9:08am to discuss the following:

1. Superintendent/Principal Contract
2. Negotiations

J. REPORT OUT OF CLOSED SESSION

The Board reported out of closed session at 9:17am

1. MSC FREEMAN/WILLET to approve the Superintendent/Principal contract and ratify the employee agreement. Unanimous.

K. ADJOURNMENT

MSC WILLET/YEGGE to adjourn the meeting, there being no further business, 9:18am. Unanimous.

pl



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Happy Valley School Foundation Fund - HVSD

Fund Type: Agency Fund

Date Established: February 26, 1998

Investment Pool: Endowed - Socially Responsible Long-Term Pool

Fund Report for April 01, 2026 – June 30, 2026

	Current Period 4/1/2026 – 6/30/2026	Year To Date 1/1/2026– 6/30/2026
Beginning Fund Balance	\$822,022.19	\$863,610.38
Plus Additions to Fund		
Earnings/(Losses)	\$78,821.80	\$68,317.52
Total Income	<u>\$78,821.80</u>	<u>\$68,317.52</u>
Less Distributions from Fund		
Distributions for Fund Purpose	\$ 0.00	\$28,907.00
Foundation Services Fee*	\$2,152.33	\$4,329.24
Total Expenditures	<u>\$2,152.33</u>	<u>\$33,236.24</u>
Ending Fund Balance	\$898,691.66	\$898,691.66

*The Foundation Services Fee helps to support fund stewardship as well as Foundation programs that assist donors, educate and strengthen local nonprofits, and build regional partnerships to address critical local issues.

If you have questions regarding your fund statement, please contact Hilary Bryant at hbryant@cfsc.org or (831) 662-2065.

total fund 57: \$ 2,138,052.51
(including county treasury amt of \$ 43,929.02)

Last quarter \$ 2,014,542.97
(including county treasury amt of \$ 100,010.54)



Happy Valley School Foundation Fund - Donor Gifts - HVSDDG

Fund Type: Designated Fund

Date Established: October 30, 2017

Investment Pool: Endowed - Socially Responsible Long-Term Pool

Fund Report for April 01, 2026 – June 30, 2026

	Current Period 4/1/2026 – 6/30/2026	Year To Date 1/1/2026– 6/30/2026
Beginning Fund Balance	\$773,257.83	\$812,007.42
Plus Additions to Fund		
Contributions	\$1,000.00	\$1,000.00
Earnings/(Losses)	\$74,171.31	\$64,274.92
Total Income	\$75,171.31	\$65,274.92
Less Distributions from Fund		
Distributions for Fund Purpose	\$ 0.00	\$26,806.00
Foundation Services Fee*	\$2,026.17	\$4,073.37
Total Expenditures	\$2,026.17	\$30,879.37
Ending Fund Balance	\$846,402.97	\$846,402.97

*The Foundation Services Fee helps to support fund stewardship as well as Foundation programs that assist donors, educate and strengthen local nonprofits, and build regional partnerships to address critical local issues.

If you have questions regarding your fund statement, please contact Hilary Bryant at hbryant@cfsc.org or (831) 662-2065.



Happy Valley School Foundation Fund - Donor Gifts - HVSDDG

Gifts received for the period April 01, 2026 through June 30, 2026

Date	Donor	Amount
2026-05-07	Bingham, Linda	1,000.00
	Total Gifts:	\$1,000.00



Happy Valley School Legacy Flex Fund - HVSL

Fund Type: Agency Fund

Date Established: July 09, 2014

Investment Pool: Nonendowed - Socially Responsible Long-Term Pool

Fund Report for April 01, 2026 – June 30, 2026

	Current Period 4/1/2026 – 6/30/2026	Year To Date 1/1/2026– 6/30/2026
Beginning Fund Balance	\$319,252.41	\$324,605.14
Plus Additions to Fund		
Earnings/(Losses)	\$30,612.36	\$26,088.86
Total Income	\$30,612.36	\$26,088.86
Less Distributions from Fund		
Foundation Services Fee*	\$835.91	\$1,665.14
Total Expenditures	\$835.91	\$1,665.14
Ending Fund Balance	\$349,028.86	\$349,028.86

*The Foundation Services Fee helps to support fund stewardship as well as Foundation programs that assist donors, educate and strengthen local nonprofits, and build regional partnerships to address critical local issues.

If you have questions regarding your fund statement, please contact Hilary Bryant at hbryant@cfsc.org or (831) 662-2065.

**QUARTERLY DISTRICT STATUS REPORT OF UNIFORM COMPLAINTS
TO THE COUNTY SUPERINTENDENT OF SCHOOLS
QUARTER ENDED June 30, 2026**

DISTRICT: Happy Valley Elementary Date Reported to District Governing Board August 12, 2026

I. INSTRUCTIONAL MATERIALS

A) Insufficient textbooks or instructional materials in the classroom:

# of Complaints	# of Complaints Resolved	# of Complaints Unresolved*
0	0	0

- Explanation: _____

B) Insufficient textbooks or instructional materials to take home:

# of Complaints	# of Complaints Resolved	# of Complaints Unresolved*
0	0	0

- Explanation: _____

C) Textbooks or instructional materials in poor or unusable condition:

# of Complaints	# of Complaints Resolved	# of Complaints Unresolved*
0	0	0

- Explanation: _____

II. TEACHER VACANCY OR MISASSIGNMENT

A) No assigned certified teacher at the beginning of the semester:

# of Complaints	# of Complaints Resolved	# of Complaints Unresolved*
0	0	0

- Explanation: _____

B) Teacher lacking credentials or training to teach English Language Learners (ELL) with
More than 20% ELL in class:

# of Complaints	# of Complaints Resolved	# of Complaints Unresolved*
0	0	0

- Explanation: _____

D) Teacher instructing class lacking subject matter competency:

# of Complaints	# of Complaints Resolved	# of Complaints Unresolved*
0	0	0

- Explanation: _____

III. FACILITIES

A) Conditions pose an emergency or urgent threat to the health or safety of students/staff:

# of Complaints	# of Complaints Resolved	# of Complaints Unresolved*
0	0	0

- Explanation: _____

SANTA CRUZ COUNTY OFFICE OF EDUCATION

Dr. Faris Sabbah, Superintendent
400 Encinal St. Santa Cruz, CA 95060

AGREEMENT

SANTA CRUZ COUNTY OUTDOOR SCIENCE SCHOOL

This agreement is entered into this 10th day of June by and between the office of Santa Cruz County Superintendent of Schools, hereafter called "Superintendent" and Happy Valley Elementary School District in Santa Cruz County, hereinafter called "District."

WHEREAS, sections 1700 *et seq.*, 8760 *et seq.* of the Education Code of the State of California authorizes the County Superintendent of Schools to contract with school districts to provide programs and classes in outdoor science and conservation education to pupils in the school district; and

WHEREAS, said Education Codes further authorize school districts to participate in such program provided under contract with the County Superintendent of Schools upon payment by the school district of the actual cost of providing such programs or classes;

NOW, THEREFORE, pursuant to such authority and in consideration of the mutual premises herein contained, the parties hereto agree as follow:

1. Superintendent agrees to conduct a program of outdoor science and conservation education during the school year 2026-2027 ("Outdoor Science School").
2. a. District agrees to participate with a minimum of 11 students of its fifth or sixth grade classes in said program during the Fall and/or Spring of the 2026-2027 school year and further agrees to pay the amount due according to the attached Fee Schedule. Payment is expected within 30 days of participation unless a prior written arrangement has been made. A Purchase Order number, or other appropriate authorization from the District, is to be attached to the signed acceptance form.

b. District agrees to have at least one *District-certificated teacher* per thirty (35) students in attendance at the Outdoor Science School.

c. If a student is unable to complete the program in which s/he is participating after arrival at the Outdoor Science School for any reason other than injury, illness, or family emergency, his/her absence shall not reduce the fee.
3. The District recognizes this activity is a school sponsored field trip and as such, agrees to provide transportation to and from the Outdoor Science School for all students, teachers and other personnel from the District, including accepting responsibility for transportation of students needing medical treatment due to injury and students who have been suspended from the Outdoor Science School program for infraction of the Outdoor Science School Program Rules, attached hereto.
4. The District agrees to share responsibility for the recruiting of the volunteer high school students that aid in the supervision of the visiting students. If the District recruits individuals 18 or older, the District shall submit an affidavit confirming a current Live Scan Fingerprint clearance 30 days in advance of participation for said adult volunteer.
5. The District shall give Superintendent at least thirty (30) days written notice if, for any reason, the guaranteed number of students will not attend. If, for any reason, more than 10% of the guaranteed number of students do not attend as agreed, and the written notification requirement, as indicated above, has not been met, the District will be held liable and will be billed for those program costs for

SANTA CRUZ COUNTY OFFICE OF EDUCATION
Dr. Faris Sabbah, Superintendent
400 Encinal St. Santa Cruz, CA 95060

SANTA CRUZ COUNTY RESIDENT OUTDOOR SCIENCE SCHOOL

STATEMENT OF POLICY

This is to advise you that our school district's children participate in the Santa Cruz County Office of Education Program on a tuition basis with the variable fees ranging from zero to \$ 535.00, depending on the number of days attending and the school's location (in or out-of-county). No separate charge is made for meals served. While participating in the program, all children are served the same food regardless of the tuition paid, with no segregation or discrimination being made because of race, creed, sex, or national origin. All children are treated equally under our policy of operation, regardless of parents' ability to pay.

Name of District

Happy Valley Elementary School

Authorized Signature

[Signature]

Date

7/1/2026

2025 Expanded Learning Opportunities Program Plan Guide

EXPANDED LEARNING OPPORTUNITIES PROGRAM PLAN GUIDE

Prepared by: Expanded Learning Division

California Department of Education 1430 N Street, Suite 3400
Sacramento, CA 95814-5901
916-319-0923

This Program Plan Template Guide is required by California Education Code (EC) Section 46120(b)(2)

Name of Local Educational Agency and Expanded Learning Opportunities Program Site(s)

Name of Local Educational Agency or Equivalent:	Happy Valley Elementary School District
Contact Name:	Michelle Stewart
Contact Email:	mstewart@hvesd.com
Contact Title:	Superintendent
Contact Phone:	831-429-1456

Instructions: Please list the school sites that your LEA selected to operate the Expanded Learning Opportunities Program (ELO-P). Add additional rows as needed.

1. Happy Valley Elementary School

Governing Board Approval Date:	August 12, 2026
Review/Revision Date:	May 14, 2025
Review/Revision Date:	May 16, 2025

Purpose

This template will aid LEAs in the development of a program plan as required by EC Section 46120(b)(2). In this program plan, LEAs will describe program activities that support the whole child and students' Social and Emotional Learning (SEL) and development.

Definitions

"Expanded learning":

Expanded Learning refers to before school, after school, summer, or intersession learning programs that focus on developing the academic, social, emotional, and physical needs and interests of pupils through hands-on, engaging learning experiences. It is the intent of the Legislature that expanded learning programs are pupil-centered, results driven, include community partners, and complement, but do not replicate, learning activities in the regular school day and school year. (See [EC Section 8482.1(a).])

"Expanded Learning Opportunities":

Expanded Learning Opportunities has the same meaning as "expanded learning" as defined in EC Section 8482.1. "Expanded learning opportunities" does not mean an extension of instructional time, but rather, opportunities to engage pupils in enrichment, play, nutrition, and other developmentally appropriate activities. (See [EC Section 46120(g)(1)]).

Expanded Learning is currently funded through After School Education and Safety (ASES), 21st Century Community Learning Center (CCLC), and ELO-P.

Educational Element:

An educational enrichment element may include, but need not be limited to, fine arts, career technical education, recreation, physical fitness, and prevention activities. Activities may also include hiring literacy coaches, high-dosage tutors, school counselors, and instructional day teachers and aides to assist pupils as part of the local educational agency's program enrichment activities. (See [EC Section 46120(d)(3)])

Expanded Learning Opportunities Program Plan Guide for Happy Valley Elementary School District

Enrichment Element:

These opportunities may include arts, career technical education, recreation, technology, and more. The United States government has provided examples of tools and resources that can support positive youth development. Those tools and resources can be found at <https://youth.gov/youth-topics/positive-youth-development>.

Off-Site Locations:

Off-Site or Non-LEA Sites include a physical location other than a school campus or other facility associated and operated by the LEA.

Plan Instructions

Development/Review of the Plan Collaborating with Partners

LEAs are encouraged to work collaboratively with partners and staff to develop and review the program plan. The LEA is responsible for the plan and the oversight of any community partners or subcontractors. The LEA should include partners in the development and review of the plan.

Quality Programs

The Expanded Learning Division adopted the Quality Standards for Expanded Learning in California and introduced requirements for Continuous Quality Improvement (CQI) to help programs reflect on **program goals, program content, and outcome measures**. Additionally, to be intentional about program management practices and activities delivered to students, LEAs should download and reference the Quality Standards to provide ongoing improvements to the program. You can find information about the Quality Standards on the California Department of Education Quality Standards and CQI web page at <https://www.cde.ca.gov/ls/ex/qualstandcqi.asp>

Completing the Program Plan

To create the program plan, provide a narrative description in response to all of the prompts listed under each Quality Standard (Program Goal) and General Question below. The LEA may customize and include additional prompts, such as describing SEL activities or refining the plan.

In addition to the narrative response, include tables, charts, or other visual representations that contribute to the understanding of the ELO-P. As needed, include attachments as addenda to further illustrate and respond to the prompts.

Due Date, Approval, and Posting of the Plan Program Plan Due Dates

All LEAs currently operating an ELO-P should have a Program Plan in place. See below for requirements for revising. It is the CDE's guidance that LEAs who receive ELO-P Funding for the first time must adopt a program plan within six months of the first apportionment of funding. The CDE may issue guidance on the development of a program plan (See [EC Section 46120(b)(C)(2)]).

Approving and Posting Program Plans

It is the CDE's guidance that this Program Plan needs to be approved by the LEA's Governing Board in a public meeting and publicly posted on the LEA's website within 30 days of approval.

Revisions/Changes**Reviewing and Revising Program Plans**

The LEA is responsible for creating, reviewing, and updating the program plan every three years in accordance with EC Section 8482.3(g)(1). The program plan template guide is considered a living document that is periodically reviewed and adjusted to reflect the needs of the community, updates to the law, and to provide continuous improvement in the development of an effective ELO-P.

It is recommended that the plan be reviewed annually. If there are substantive changes to any aspect of this plan it should be updated sooner than the three year timeline.

1—Safe and Supportive Environment

Physical Safety

Describe how the program will provide opportunities for students to experience a safe and supportive environment. Include if the program will be offered on the school site or off campus. If not onsite, describe where in the community it will be and how students will be supported to get there. Additionally, describe the elements such as staff training, incident reporting, and maintenance of health records.

HVESD is committed to educate the whole child in a small, safe, community supported school that provides a solid foundation to achieve academic, social, and emotional success. The ELO-P program will be offered at the school site. The school administration and ELO-P coordinator (if applicable) will meet with the support staff personnel to review and discuss the safety guidelines and procedures to be followed during the extended day programs. Classroom walk-throughs will be conducted to support staff in regards to academics, extra curricular activities, and most importantly, classroom management. Social emotional strategies and best practices will be implemented in the Extended Day programs to ensure that all students are developing the social and emotional skills they need to succeed in school and in life.

The Happy Valley Expanded Learning Opportunities Program (ELO-P), is partly offered in partnership with the Sprouts After School program. Sprouts has worked collaboratively with Happy Valley for many years to provide engaging, high-quality programming to area youth in a positive and safe environment. The HVESD ELO-P will be open to all TK-6th graders, with total enrollment numbers based on the availability of space. Priority enrollment will be given to “unduplicated” student groups, as defined by the California Department of Education as students from socio-economically disadvantaged homes, students who are English Learners, foster youth, and students experiencing homelessness. All program fees will be paid by the District for any unduplicated student. Additional scholarships may be available for families upon request, based on financial need. Additionally, classes are offered periodically after school by on site certificated teachers. These classes include but are not limited to cooking, chess, yearbook, birding, journaling, 3D printing, Robotics, and STEM.

Both interior and exterior spaces are well maintained and clean.

Emotionally Safe & Supportive

Describe how the program provides an emotionally safe and supportive environment for students. This may include how the program incorporates social emotional learning.

As part of the ELO-P enrollment process, staff will work with participating families to clearly identify the health and medical needs of students to ensure proper support is put in place. An additional component of enrollment will include parent notification as to the location, dates, and hours of program operation. Staff will also maintain regular communication with families, sending home information about program highlights and events. Sprouts staff will follow established systems for participating in safety and first aid training, documenting and communicating incidents, and maintaining an easily accessible list of all student participants, including emergency contact information. Staff will also receive training on how to respectfully welcome and release students from the program, engage in positive behavior intervention and support, and build trusting and nurturing relationships with students.

2—Active and Engaged Learning

Explain how the program will provide opportunities for students to experience active and engaged learning that either supports or supplements, but does not duplicate, the instructional day.

HVESD will assess the needs of the community, students, parents, and school staff with the use of surveys, state and local assessment data, discipline data, and attendance reports. Ongoing input and outcome-based decision making of the program administration will occur continuously with educational partners. In addition to homework help and

tutoring, ELO-P participants will exercise choice in selecting enrichment clubs and physical activities aligned to specific areas of interest.

3—Skill Building

Detail how the program will provide opportunities for students to experience skill building.

HVESD will provide additional support and intervention in the core areas of ELA and math which will be given to support our students according to their diverse needs. All program activities will support student development of 21st Century Skills such as creativity, critical thinking, and technology. All classes will provide opportunities for students to practice skills, learn from their experiences, and make a connection between the activity and their lives outside of the program, including creative arts, athletics and sports, lifeskills classes, and tutoring. Enrichment activities will support engagement with school, youth development and offer learning opportunities unavailable to students during the regular day to support the improvement of student academic achievement as well as overall student success.

4—Youth Voice and Leadership

Describe how the program will provide opportunities for students to engage in youth voice and leadership. Consider and describe what opportunities youth have to lead activities or provide mentorship within the program. Address how youth are included in program quality assessment and improvement.

Students are surveyed and evaluated by staff to guide in the development of training, curricula, and projects that will meet students' needs, interest and real world problems. The site administrator will work with Student Council and Sprouts staff to elicit suggestions.

5—Healthy Choices and Behaviors

Explain how the program will provide opportunities for students to engage in healthy choices and behaviors. Include the plan to provide nutritious meals and snacks and how opportunities for physical activity will be provided.

The ELO-P will promote student well-being. All students in the district receive lunch in accordance with the National School Lunch Program. The afternoon ELO-P programs will provide students with a daily nutritious snack in compliance with California Nutritional guidelines. Participants will be given the opportunity to engage in daily research-based nutrition and physical activities which support program goals.

Through structured physical activities students learn and grow through play. Play provides students with an opportunity to learn while engaging in fun activities, discover themselves, and build social skills in both recreational and physical activities. The daily physical activity sessions also extend the activities students use in their regular day PE curriculum. The promotion of healthy practices integrated within the ELO program will include numerous options for daily physical activity to cultivate dexterity, teamwork, social skills, and fitness. These include both indoor and outdoor activities.

The health and safety of all students begins with a smooth transition from the regular school day to the after school programs. Student attendance in after school programs is tracked at the end of the regular school day when the after school program starts and monitored throughout the after school program sessions. After school program staff monitor student behavior to ensure that all students are safe, treated with respect, and valued for their individuality. Rules and expectations are outlined in the registration packets that go home to parents and are reviewed with students in after school program classes. Nutritious snacks are provided daily for every student in attendance.

6—Diversity, Access, and Equity

Describe how the program is designed to address cultural and linguistic diversity and provide opportunities for all students to experience diversity, access, and equity. Include how the ELO-P will provide access for students with disabilities.

HVESD ELO-P will create an environment where students experience values that embrace diversity and equity regardless of race, color, religion, sex, age, income level, national origin, physical ability, sexual orientation and/or gender identity and expression. The program will create plans that outreach to all students and create a welcoming environment representing the diversity of participants. Program staff will participate in ongoing diversity an sensitivity training and adapt activities to accommodate the physical and developmental abilities of all participants. The District encourages all students to participate in its after-school program especially students with disabilities, low income, English learners, Foster and Homeless Youth.

In order to best support the needs of diverse program participants, a survey will be sent to expanded learning students, participants' families, as well as teachers who work with the program. The survey will gather feedback on ELO-P areas of strength and growth, in addition to recommendations for future program design and continuous improvement. The survey will also provide a platform for students to share their experiences, and provide valuable input to drive program practices, activities, and goals. Embedded social-emotional learning lessons will reinforce the development of healthy relationships, effective peer communication, and appreciation of the unique strengths and differences of others.

7—Quality Staff

Staff Engagement

Detail how the program will provide opportunities for students to engage with quality staff.

The ELO-P program will solicit qualified outside agency personnel to engage with the ELO-Program which our students will benefit from their expertise and experience. All Staff will demonstrate professionalism, integrity, and competency as a positive role model. Staff will be focused on creating a positive learning environment for students and will embrace lifelong learning, attending ongoing professional development opportunities to hone professional skills. When assigning HVESD staff to work with the ELO-P, experience, knowledge, interest, diversity, and capacity for engaging children in age-appropriate and meaningful learning will be taken into careful consideration. Staff working with students will undergo rigorous federal background checks and will receive, as part of the onboarding process, robust safety training. Staff will be selected to work with ELO-P based on their ability to facilitate and integrate program curricula, evidence-based youth development principles, and best practices in designing and implementing program activities. Staff will be expected to facilitate learning opportunities that engage students in active and meaningful experiences to build skill development. As described in the previous plan section, an annual stakeholder survey will provide parents, participants, and school staff the opportunity to evaluate the expanded learning program, and to provide input with regard to areas of strength and growth. This information will identify areas of focus, goals, and specific actions to achieve identified goals, based upon the principles described within California Quality Standards for Expanded Learning.

Minimum Staff Qualifications

What are the minimum qualifications of an instructional aide pursuant to the policies of the LEA? Describe the process for health and safety screening for staff. Describe how your program will maintain minimum staffing ratios. (See [EC Section 46120(b)(2)(D)]).

All staff meet the minimum qualifications of an instructional aide.

Staff Development

Describe your staff training and development plan. Include the tools and resources offered to staff to provide them with the competencies needed to engage and enrich students. LEAs operating ASES, 21st CCLC, and/or the ELO Program, may close program to offer up to 3 days of staff development. This activity is allowable during the instructional days or the nonschooldays. (See [EC Section 46120(b)(8)]).

Regular professional development is offered to all staff who participate in the ELO-P program.

8—Clear Vision, Mission, and Purpose

Explain the program’s clear vision, mission, and purpose.

The purpose of the ELO program is to provide students with a safe environment to learn and grow outside of the traditional school day and year, enable students to form meaningful connections with peers and caring adult professionals, ensure access to life-enhancing programs and character development opportunities, and instill self-confidence and growth mindsets in youth.

9—Collaborative Partnerships

Students and Families

Describe how students and families were involved in the creation of the program plan and how they are engaged throughout the year.

Students and Families have regular input into the LCAP and suggestions for programming. Annual surveys are given that elicit responses.

Community Based Organizations and other Non-LEA Partners

Describe how the LEA engaged Community Based Organizations and other non- LEA partners to design the program plan and how they will be included in the administration/implementation of the program. Include how ELO-P will be coordinated with other initiatives such as Community Schools, Multi-Tiered Systems of Support.

10—Continuous Quality Improvement

Describe the collection and use of student social, behavioral, or skill development data to support CQI, to engage in reflection and be intentional about program management practices and activities delivered to students. Data outcomes may relate to specific social-emotional competencies, including, but not necessarily limited to, social skills, self-control, academic mindset, perseverance, conflict resolution, and school connectedness. More information on CQI can be found on the CDE Quality Standards and CQI web page, as previously provided.

Student progress will be measured by progress reports completed by ELO-P personnel regarding students' performance. Input will also be sought from the regular classroom teachers regarding areas of need and areas of improvement. The District will continue to provide a rigorous, standards-aligned curriculum that meets the needs of our population. We will continue to obtain information on students' classroom performance, attendance, and participation to align our program to the needs of our students, parents, and community. Data will be collected in a variety of ways which will include; surveys, interviews, observations and self-assessments. The information will be collected from all stakeholders, which will include, students, parents, community members and staff. The results will be used to drive improvement of the program.

11—Program Management

Policies and Procedures

Include as an addendum (or hyperlink) any approved program policies, procedures, or manuals. This should include documentation and record-keeping practices, including enrollment/registration, attendance tracking, etc.

The site administrator will ensure that a comprehensive expanded learning site plan that is aligned to the programs vision, mission, and focused on the needs of the school.

Budget

Provide your budget for the program including cost-share items. The LEA is required to ensure all costs charged to the program are reasonable, necessary, and allowable in accordance with applicable statutes, regulations, and program plans for the Expanded Learning Opportunities Program³. How does this budget reflect the needs of students and families within the community?

The majority of the budget is for personnel. A percentage of the fund is spent on maintenance and utilities.

Provide a detailed description of how the LEA will ensure the proper implementation of the above requirements.

The plan is reviewed by staff and the board on a regular basis.

1 (California Public Contract Code (CPCC) 20110- 20118; CSAM including but not limited to 101, 405, 410; California Code of Regulations (CCR) Title IV 70; GC 1090; EC 14500-14509; EC 41010-41024)

2 (California School Accounting Manual (CSAM) Procedure 905; Education Code (EC) 14500-14509; EC 41010-41024; California Government Code (GC) 13401-13407)

3 (EC 46120[b](8); 46120 [d](3); 46120 [d](8)[A-B])

General Questions

Existing After School Education and Safety (ASES) and 21st Community Learning Centers (21st CCLC) Elementary and Middle School grantees

ASES, 21st CCLC Elementary/Middle School, and the ELO-P should be considered a single, comprehensive program. In coordinating all these funding streams to move towards a single program, the expectation is that the most stringent programmatic requirements will be adopted for program guidance.

Do you have an ASES Grant?

No

Do you have a 21st CCLC Grant?

No

If one or both grants are held, describe how these funding sources will be leveraged with the ELO-P funding to create one comprehensive and universal Expanded Learning Program.

Transitional Kindergarten and Kindergarten

Programs serving transitional kindergarten or kindergarten pupils shall maintain a pupil-to-staff member ratio of no more than 10 to 1. (See [EC Section 46120(b)(2)(D)]). Please address the proposed schedule and plan for recruiting and preparing staff to work in the program, including supporting them to understand how to work with younger children. How will the lower pupil-to-staff ratio be maintained? How will the curriculum and program be developmentally informed to address this younger age group?

There is a 1:10 ratio of all students at all times. Staff who work with the youngest students receive professional development to work with TK and Kinder students. The curriculum is established based on the needs and ages of the students.

Offer and Provide Access

Describe how your LEA will offer ELO-P to their pupils and families using culturally and linguistically effective/appropriate communication channels. Describe how your LEA will provide access to the ELO-P by describing the enrollment process. Include the distribution of the form, signature process, and how the forms are stored. Will transportation be provided?

All information is sent to families via email. Translation services are built in if necessary. Families who need assistance with the enrollment process are able to receive 1:1 coaching. If there are students who could benefit from the afterschool program and not utilizing it, families are contacted directly. Programs are offered onsite so no transportation is necessary.

Field Trips

Field trips for entertainment purposes are not allowable. However, field trips can be a valuable educational and enrichment experience for youth. Field trips should be connected to the academic or enrichment program and provide an educational experience from which students can grow academically or culturally.

ELO-P funding can only be used for educational field trips that are coordinated and provided by the ELO-P. The educational field trips should be directly connected to the academic or enrichment components of the ELO-P. ELO-P funding cannot be used for field trips provided or coordinated by the core instructional day. ELO-P Field trips must follow ELO-P program requirements, such as maintaining ratios and ensuring staff meet the minimum requirements for an instructional aide based on district policies. The LEA should also follow local policies and procedures related to field trips.

Describe the purpose of the field trip and learning outcomes intended. Include the specific knowledge and skills students will develop. Include the field trip location and its educational significance. Include the anticipated dates(s), duration of the trip, grade level(s) participating, and transportation arrangements.

There are no field trips.

Program Fees

Every student attending a school operating a program is eligible to participate in the program. Programs may charge family fees. Programs that charge family fees shall waive the cost of these fees for students who are eligible for free or reduced-price meals, for a child that is a homeless youth, as defined by the federal McKinney- Vento Homeless Assistance Act (42 U.S.C. Sec. 11434a), or for a child who the program knows is in foster care. A program that charges family fees shall schedule fees on a sliding scale that considers family income and ability to pay.

If applicable, describe your fee structure, including the process for waiving fees as outlined above and your sliding scale. If no fees will be collected please write that in the space provided.

Classes offered after school are available at no cost to all students. All students who qualify as low socio economic receive free tuition to Sprouts. Parents requesting assistance may apply and the sliding scale determined by the State of California.

Sample Program Schedule- Regular Schoolday

Please include a sample program schedule that describes how the ELO-P or other fund sources, including the California State Preschool Program for children enrolled in transitional kindergarten or kindergarten, and all other grades, will be combined with the instructional day to create a minimum of nine hours per day of programming (instructional day plus ELO-P or other supports). **Programs are required to include both an educational and enrichment element; the sample program schedule should clearly identify that this requirement is met.**

Additional Legal Requirements

Below are additional legal requirements for the ELO-P. Please ensure your Program Plan meets all of these legal requirements:

Operations, Sites, ELO Program Plan, Family Fees, Ratio EC Section 46120(b)(2):

Local educational agencies operating expanded learning opportunity programs pursuant to this section may operate a before school component of a program, an after school component of a program, or both the before and after school components of a program, on one or multiple school sites, and shall comply with subdivisions (c), (d), and (g) of Section 8482.3, including the development of a program plan based on all of the following:

- (A) The department's guidance.
- (B) Section 8482.6.
- (C) Paragraphs (1) to (9), inclusive, and paragraph (12) of subdivision (c) of Section 8483.3.
- (D) Section 8483.4, except that programs serving transitional kindergarten or kindergarten pupils shall maintain a pupil-to-staff member ratio of no more than 10 to 1.

Regular Schooldays and Hours EC Section 46120(b)(1)(A):

On schooldays, as described in Section 46100 and Sections 46110 to 46119, inclusive, and days on which school is taught for the purpose of meeting the 175- instructional-day offering as described in Section 11960 of Title 5 of the California Code of Regulations, in-person before or after school expanded learning opportunities that, when added to daily instructional minutes, recess, and meals, are no less than nine hours of combined instructional time, recess, meals, and expanded learning opportunities per instructional day.

Nonschool Days and Hours EC Section 46120(b)(1)(B):

- (A) For at least 30 nonschooldays, inclusive of extended school year days provided pursuant to paragraph (3) of subdivision (b) of Section 56345, no less than nine hours of in-person expanded learning opportunities per day.
- (B) Extended school year days may include in-person before or after school expanded learning opportunities that, when added to daily instructional minutes, recess, and meals, are not less than nine hours of combined instructional time, recess, meals, and expanded learning opportunities per instructional day.

Prioritizing School Sites EC Section 46120(b)(3):

Local educational agencies shall prioritize services provided pursuant to this section at schoolsites in the lowest income communities, as determined by prior year percentages of pupils eligible for free and reduced-price meals, while maximizing the number of schools and neighborhoods with expanded learning opportunity programs across their attendance area.

Grades Served EC Section 46120(b)(4):

Local educational agencies may serve all pupils, including elementary, middle, and secondary school pupils, in expanded learning opportunity programs provided pursuant to this section.

Partners

EC Section 46120(b)(6):

Local educational agencies are encouraged to collaborate with community-based organizations and childcare providers, especially those participating in state or federally subsidized childcare programs, to maximize the number of expanded learning opportunity programs offered across their attendance areas.

Audit

EC Section 46120(c)(1):

Commencing with the 2023–24 fiscal year, a local educational agency shall be subject to the audit conducted pursuant to Section 41020 to determine compliance with subdivision (b).

Snacks and Meals

EC Section 8482.3(d)(1-2):

- (A) [Local educational agencies] shall agree that snacks made available through a program shall conform to the nutrition standards in Article 2.5 (commencing with Section 49430) of Chapter 9 of Part 27 of Division 4 of Title 2.
- (B) [Local educational agencies] shall agree that meals made available through a program shall conform to the nutrition standards of the United States Department of Agriculture's at-risk afterschool meal component of the Child and Adult Care Food Program (42 U.S.C. Sec. 1766).

Program Capacity, Family Fees, Sliding Scale

EC Section 46120(b)(5):

Local educational agencies may charge pupil fees for expanded learning opportunity programs provided pursuant to this section, consistent with Section 8482.6.

Staff Minimum Qualifications, Ratio

EC sections 8483.4(a) and 46120(b)(2)(D):

The administrator of every program established pursuant to this article shall establish minimum qualifications for each staff position that, at a minimum, ensure that all staff members who directly supervise pupils meet the minimum qualifications for an instructional aide, pursuant to the policies of the school district. Selection of the program site supervisors shall be subject to the approval of the school site principal.

The administrator shall also ensure that the program maintains a pupil-to-staff member ratio of no more than 20 to 1, except that programs serving transitional kindergarten or kindergarten pupils shall maintain a pupil-to-staff member ratio of no more than 10 to 1. All program staff and volunteers shall be subject to the health screening and fingerprint clearance requirements in current law and district policy for school personnel and volunteers in the school district.

Program Components

EC Section 8482.3(c)(1)(A–B):

Each component of a program established pursuant to this article shall consist of the following two elements:

- (A) An educational and literacy element in which tutoring or homework assistance is provided in one or more of the following areas: language arts, mathematics, history and social science, computer training, or science.
- (B) An educational enrichment element that may include, but need not be limited to, fine arts, career technical education, recreation, physical fitness, and prevention activities.

Third Party Notifications

EC Section 8483.4(b-d):

- (A) When a local educational agency contracts with a third party to operate a program pursuant to this article, the local educational agency shall require the third party to notify the local educational agency by the next working day following, and to submit a written report within seven days of, the occurrence of any health- or safety- related issues, including, but not limited to, issues involving criminal background clearances for employees, building safety, and any event specified in subdivision (c).
- (B) For purposes of this section, an “event” includes any of the following:
 - (1) Death of a child from any cause.
 - (2) Any injury to a child that requires medical treatment.
 - (3) Any unusual incident or child absence that threatens the physical or emotional health or safety of a child.
 - (4) Any suspected child abuse or neglect, as defined in Section 11165.6 of the Penal Code.
 - (5) Epidemic outbreaks.
 - (6) Poisonings.
 - (7) Fires or explosions that occur in or on the premises.
 - (8) Exposure to toxic substances.
 - (9) The arrest of an employee of the third party.
- (C) Any other event as specified by the local educational agency.

When a local educational agency contracts with a third party, the local educational agency shall require the third party to request from parents or guardians pupil health information, such as whether a pupil has allergies or asthma, before pupil enrollment. Parents or guardians may provide this information at their discretion and are not required to provide pupil health information for the pupil to receive services pursuant to this article.

HVESD Strategic Plan

Our Mission

Happy Valley School's Mission is to educate the whole child in a small, safe, community supported school that provides a solid foundation to achieve academic, social, and emotional success.

Our Vision

Happy Valley will be a place where all students will be prepared for academic, social, and emotional success for the next stages of life and school.

Our Core Values

- Provide an exceptional education with high expectations
- Value honesty and integrity
- Engage our diverse community
- Cultivate aware and involved citizens
- Recruit, retain and support high quality staff
- Honor students as individuals with a focus on the whole child
- Foster a small, rural school environment that reflects the history and community of Happy Valley
- Provide a safe place both academically and emotionally

Happy Valley Goals

I. Student Achievement and Engagement

- Provide differentiation for all students
- Provide enrichment activities such as garden, library, art and music
- Evaluate current teaching practices and investigate curriculum that supports all learners
- Provide social and emotional supports for all students

II. Fiscal Stewardship

- Maintain balanced budget
- Provide safe and well-maintained facilities

III. Public Relations

- Communicate transparently to the school community about important Board decisions
- Support community engagement and Provide events where the community is invited (i.e. Heroes of Happy Valley)
- Collaborate with the HVES Parent Club
- Participate in work days that enhance the campus

IV. Human Resources

- Retain, recruit (when necessary) and support high quality staff
- Create positive relations between the staff and school board

Please see action steps and metrics below.

Goal I. Student Achievement and Engagement

Action Step 1: Evaluate Current Teaching Practices and Investigate Curriculum that Supports All Differentiation for All Learners																																																																																																																			
Metrics, Measurement	Data listing criteria for support. Schedule of student contacts with baseline scores. Intervention Program and results Benchmark/ report card data Dashboard Data																																																																																																																		
Baseline	Intervention provided 4 days per week,prioritizing students of academic need first. Spring 2025 CAASPP data <i>*Scaled scores show maintenance of growth in ELA and Math</i> <table><tr><th colspan="7">Ongoing CAASPP Happy Valley scores</th></tr><tr><th></th><th>2023 ELA</th><th>2024 ELA</th><th>2025 ELA</th><th>2023 Math</th><th>2024 Math</th><th>2025 Math</th></tr><tr><td>3rd</td><td>100%</td><td>82%</td><td>78%</td><td>87%</td><td>86%</td><td>94%</td></tr><tr><td>4th</td><td>85%</td><td>71%</td><td>61%</td><td>70%</td><td>82%</td><td>78%</td></tr><tr><td>5th</td><td>94%</td><td>86%</td><td>93%</td><td>63%</td><td>59%</td><td>79%</td></tr><tr><td>6th</td><td>80%</td><td>90%</td><td>93%</td><td>70%</td><td>73%</td><td>80%</td></tr><tr><td>OVERALL</td><td>90%</td><td>82%</td><td>80%</td><td>73%</td><td>75%</td><td>83%</td></tr></table> Report Card Data <table><tr><th colspan="3">Happy Valley Trimester 1 Report Cards 2025-26</th><th colspan="3">Happy Valley Trimester 1 Report Cards 26-27</th></tr><tr><th>Grade Level</th><th>Overall ELA</th><th>Overall Math</th><th>Grade Level</th><th>Overall ELA</th><th>Overall Math</th></tr><tr><td>kinder</td><td>2.9</td><td>2.9</td><td>kinder</td><td>2.60</td><td>2.94</td></tr><tr><td>first</td><td>3.0</td><td>3.0</td><td>first</td><td>3.00</td><td>3.00</td></tr><tr><td>second</td><td>2.7</td><td>2.9</td><td>second</td><td>2.86</td><td>3.03</td></tr><tr><td>third</td><td>3.0</td><td>2.9</td><td>third</td><td>3.08</td><td>3.02</td></tr><tr><td>fourth</td><td>2.9</td><td>2.8</td><td>fourth</td><td>2.95</td><td>2.82</td></tr><tr><td>fifth</td><td>2.9</td><td>2.7</td><td>fifth</td><td>3.04</td><td>3.15</td></tr><tr><td>sixth</td><td>3.1</td><td>2.9</td><td>sixth</td><td>3.21</td><td>3.04</td></tr><tr><td>average</td><td>2.9</td><td>2.9</td><td>average</td><td>2.96</td><td>3.00</td></tr></table>						Ongoing CAASPP Happy Valley scores								2023 ELA	2024 ELA	2025 ELA	2023 Math	2024 Math	2025 Math	3rd	100%	82%	78%	87%	86%	94%	4th	85%	71%	61%	70%	82%	78%	5th	94%	86%	93%	63%	59%	79%	6th	80%	90%	93%	70%	73%	80%	OVERALL	90%	82%	80%	73%	75%	83%	Happy Valley Trimester 1 Report Cards 2025-26			Happy Valley Trimester 1 Report Cards 26-27			Grade Level	Overall ELA	Overall Math	Grade Level	Overall ELA	Overall Math	kinder	2.9	2.9	kinder	2.60	2.94	first	3.0	3.0	first	3.00	3.00	second	2.7	2.9	second	2.86	3.03	third	3.0	2.9	third	3.08	3.02	fourth	2.9	2.8	fourth	2.95	2.82	fifth	2.9	2.7	fifth	3.04	3.15	sixth	3.1	2.9	sixth	3.21	3.04	average	2.9	2.9	average	2.96	3.00
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2025-26 Tasks	Students of greatest need are given first priority for intervention. Provide disaggregated data throughout the school year that includes all levels of learners.																																																																																																																		
Results	Intervention is provided to all grade levels by the TK teacher, with an emphasis on 1st and 2nd grades.																																																																																																																		

Action Step 2: Provide Enrichment Activities	
Metrics, Measurement	Survey results Schedule of pull outs and after school activities Survey of students/parents/teachers
Baseline	All students invited to Sprouts Day Camps. The District covers the cost for students in need. 2024-25 After School care for Kindergarten-6th grade daily. District covers the cost of students in need.
2025-26 Tasks	Revisit after school opportunities in the future, discuss with parent club. Look for opportunities during the school day to enrich student experiences.
Results	ELOP classes offered after school in Winter and Spring 2025-26 Winter=5 classes/60 students Spring=6 classes/60 students Band continues until the end of the year

Action Step 3: Provide Social and Emotional Supports for All Students	
Metrics, Measurement	Counseling program Information about PeaceBuilder Program Parent, staff and student surveys
Baseline	2024-25: 21 students in counseling 2025 Parent Survey: 96% believe students' social and emotional needs are met. Best practices and training shared at staff and aide meetings.
2025-26 Tasks	Continue with counseling and PeaceBuilder Program
Results	2025-26 21 students in counseling; counseling intern all classes once a week 2025 Parent Survey: 98% believe students' social and emotional needs are met.

Goal II. Fiscal Stewardship

Action Step 1: Maintain Balanced Budget	
Metrics, Measurement	Board Reports Positive certification from the COE
Baseline	2024-25 Adopted Budget: Positive certification from the COE Concern about MYP
2025-26 Tasks	Seek to make cuts or find alternative funding opportunities. Fiscal stability plan if needed Consider District fundraising to the general fund Consider Bond in the future
Results	Procured donations

Action Step 2: Provide Safe and Well-Maintained Facilities	
Metrics, Measurement	SARC Workmans' Comp
Baseline	Summer 2023 Maintenance Worker hired Ongoing list of needs Regular janitorial support in classrooms
2025-26 Tasks	Hire a part time maintenance worker to maintain facilities and look for safety and maintenance needs. Modernization Project Evaluate services and outcome of projects.
Results	Completed restroom project Repairs on MPR roof

Action Step 3: Launch fundraising campaign	
Metrics, Measurement	Budget Cost of planned construction, particularly finishing the current project
Baseline	Current state of the budget and WHY
2025-26 Tasks	Consider support from outside, including alumni Call to action to our families to find donors Look for possible grants

	Consider combining community event with fundraising kickoff Revisit educating people about the endowment and parcel tax Reach out to the Alumni who we know would be willing to contribute.
Results	Community BBQ: education about endowment, alumni participation \$50,000 raised!

Goal III. Public Relations

Action Step 1: Support Community Engagement and Provide Events that the Community is invited to (i.e. Heroes of Happy Valley)	
Metrics, Measurement	List of events
Baseline	2023-24 there were 2 field days Calendar of events shared with board members (ie. Redwood Gala)
2025-26 Tasks	Reengage Board presence at all events Consider outside school community events Discuss fundraising Review tenants and by-laws of Heroes of Happy Valley. Attend the SCZCSBA meetings Focus on Heroes of Happy Valley.
Results	Community BBQ: Successful community engagement and fundraiser. All board members attended, 3 who were intricately involved

Action Step 2 Collaborate with the HVES Parent Club	
Metrics, Measurement	Agendas Events
Baseline	Regular involvement of board, staff and administration at Parent Club meetings and functions May 2024 Community BBQ
2025-26 Tasks	Outreach to Parent Club (possible committees, including fundraising) Provide yearly calendar

	Regular report from Parent Club Representative Board members to attend Parent Club Meetings
Results	Regular communication, through the superintendent Parent Club president attends board meetings regularly

Action Step 3: Communicate Transparently to the School Community About Important Board Decisions	
Metrics, Measurement	Newsletters Website Community response at Board Meetings
Baseline	Weekly Newsletters
2025-26 Tasks	Provide monthly board meetings on the Friday newsletter Find ways to encourage attendance Respond to parents as needed.
Results	Regular newsletters from the superintendent to the school community

Goal IV. Human Resources

Action Step 1: Retain, Recruit (when necessary) and Support High Quality Staff	
Metrics, Measurement	Salary Schedule List of retention of teachers CBA
Baseline	2024 1 new teacher 1% raise
2025-26 Tasks	Maintain current practices
Results	Negotiations not settled as of May, 2026

Action Step 2: Create Positive Relations Between the Staff and School Board	
Metrics, Measurement	Staff reports at Board meetings Surveys

Baseline	2024 Board members attended beginning of the year breakfast and the 6th grade graduation 2024 All board members participated in the Community BBQ and work day
2025-26 Tasks	Possible Board Retreat Attend beginning of the year breakfast, other events available Ensure board presence at all major events Plan for/attend outside of school community events, such as events hosted at the school during non-school hours.
Results	Board presence at all events

** Last update 5/13/2026*

HAPPY VALLEY ELEMENTARY SCHOOL
DISTRICT

SCHOOL FACILITY PROGRAM
CLOSE-OUT SAVINGS AUDIT REPORT

HAPPY VALLEY ELEMENTARY SCHOOL

PROJECT NO. 57/69757-00-001



**HAPPY VALLEY ELEMENTARY SCHOOL DISTRICT - HAPPY VALLEY ELEMENTARY SCHOOL
SCHOOL FACILITY PROGRAM (SFP) CLOSE-OUT SAVINGS AUDIT REPORT
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PROJECT NO. 57/69757-00-001**

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INDEPENDENT AUDITOR'S REPORT ON PERFORMANCE

To the Board of Education
Happy Valley Elementary School District
Santa Cruz, CA 95065

We conducted a close-out performance audit of Happy Valley Elementary School District (the "District") School Facility Program (SFP) Use of Savings Project No. 57/69757-00-001.

We conducted this performance audit in accordance with generally accepted *Government Auditing Standards*. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our objectives.

Based on our procedures, we concluded that the District properly identified, reported, and used School Facility Program project savings in accordance with the applicable requirements of the Leroy F. Greene School Facilities Act of 1998 (Chapter 12.5, commencing with Section 17070.10, of Part 10 of Division 1 of Title 1 of the California Education Code), the regulations of the State Allocation Board (SAB), Office of Public School Construction (OPSC) guidance, and the approved project funding requirements. Management is responsible for the preparation of the Schedule of Use of Savings and compliance with these requirements.

In planning and performing our audit, we obtained an understanding of the District's internal control in order to determine whether the internal controls were adequate to help ensure the District's compliance with the applicable requirements of the Leroy F. Greene School Facilities Act of 1998 (Chapter 12.5, commencing with Section 17070.10, of Part 10 of Division 1 of Title 1 of the California Education Code), the regulations of the State Allocation Board (SAB), Office of Public School Construction (OPSC) guidance, and the applicable procedures contained in the *2025-26 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting - Appendix B*, issued by the California Education Audit Appeals Panel, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control. Accordingly, we do not express an opinion on the effectiveness of the District's internal control.

The results of our tests indicated that the accompanying Schedule of Use of Savings was prepared, in all material respects, in accordance with the applicable requirements of the Leroy F. Greene School Facilities Act of 1998 (Chapter 12.5 (commencing with Section 17070.10) of Part 10 of Division 1 of Title 1 of the California Education Code) and the *2025-26 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting - Appendix B*, issued by the California Education Audit Appeals Panel.

This report is intended solely for the information and use of the District and is not intended to be and should not be used by anyone other than this specified party.

Harshwal & Company LLP

San Diego, California
July 24, 2026

BACKGROUND INFORMATION

**HAPPY VALLEY ELEMENTARY SCHOOL DISTRICT - HAPPY VALLEY ELEMENTARY SCHOOL
SCHOOL FACILITY PROGRAM (SFP) CLOSE-OUT SAVINGS AUDIT REPORT
BACKGROUND INFORMATION**

GENERAL

The Leroy F. Greene School Facilities Act of 1998 (Senate Bill 50) was chaptered into law on August 27, 1998, establishing the School Facility Program (SFP). The SFP provides for a wide variety of state funding, including, but not limited to, new construction, modernization, charter school facilities, career technical education facilities, seismic mitigation, facility hardship, joint-use programs, high performance attributes, and assisting in the relief of overcrowding. The two major funding types available are "new construction" and "modernization." The new construction grant provides funding on a 50/50 state and local match basis. The modernization grant provides funding on a 60/40 state and local match basis. Approval by the Division of the State Architect (DSA) is required before signing a contract for any new construction, modernization and/or alteration projects for which State funding is provided to ensure that districts are providing adequately safe facilities to students.

On November 8, 2016, California voters approved Proposition 51, the California Public School Facility Bonds Initiative, which authorizes \$9 billion in general obligation bonds to fund construction and improvement of K-12 and community college facilities. The measure designates \$7 billion for K-12 projects falling under four types of projects (new construction, modernization, career technical education facilities, and charter school facilities), and \$2 billion for any facility project for community colleges.

Upon completion of a School Facility Program project, a district may be required to prepare a Schedule of Use of Savings identifying any remaining project savings and the disposition of those funds in accordance with the requirements of the School Facility Program. The purpose of this audit is to determine whether the Schedule of Use of Savings has been prepared in accordance with the applicable requirements of the School Facility Program and related guidance issued by the Office of Public School Construction (OPSC).

LEGISLATIVE HISTORY

Funding for projects approved in the SFP comes exclusively from statewide general obligation bonds approved by the voters of California. The first source of funding for the program was Proposition 1A, approved by the voters in November 1998, and the most recent source was Proposition 51, approved in November 2016.

The SFP continues to evolve through legislative and regulatory changes. Significant changes took effect with Assembly Bills (AB) 16 and the voter-approved Proposition 47 in November 2002, which included funding for charter school facilities, critically overcrowded schools, and joint-use projects. Additional changes to the program impacted new construction funding including the suspension of priority points, an additional grant for energy deficiency, and several modifications to the determination of eligibility. Added changes that impacted modernization funding include the change of the funding ratio between the state and the school district from 80 percent state and 20 percent school district to 60 percent state and 40 percent school district and included additional grants for energy deficiency and the modernization of buildings 50-years old or older. The passage of Proposition 55 in March 2004, provided additional funding for the programs previously established by AB 16. AB 127 was signed into law in May 2006, and was approved by the voters in November 2006, as Proposition 1D. As with the prior bonds, these funds were provided to accommodate future enrollment growth, renovate and modernize older school buildings, charter school facilities, and joint-use projects. Proposition 1D also provided new funding for career technical education projects, seismic mitigation projects, environmentally friendly "high-performance" enhancements, and portable classroom building replacements.

**HAPPY VALLEY ELEMENTARY SCHOOL DISTRICT - HAPPY VALLEY ELEMENTARY SCHOOL
SCHOOL FACILITY PROGRAM (SFP) CLOSE-OUT SAVINGS AUDIT REPORT
BACKGROUND INFORMATION**

LEGISLATIVE HISTORY - CONT'D

Most recently, California voters approved Proposition 51 in November 2016. Proposition 51 was the result of a voter initiative and provides additional funding to continue the new construction and modernization of K-12 public school facilities. This funding is designated for K-12 school districts and charter schools to accommodate future enrollment growth, renovate and modernize older school buildings, and construct and modernize career technical education facilities.

SCHOOL FACILITY PROGRAM - HAPPY VALLEY ELEMENTARY SCHOOL

The District completed Financial Hardship Project No. 57/69757-00-001 under the School Facility Program (SFP), administered by the Office of Public School Construction (OPSC). Upon completion of the project, School Facility Program savings of \$181,695 were identified. The District subsequently prepared a Schedule of School Facility Program - Use of Savings Summary reporting the use of these savings for bathroom Project - General Construction. Pursuant to Education Code Section 41024, projects receiving School Facility Program funding after June 30, 2017 are subject to a savings audit in accordance with the *2025-26 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting - Appendix B*, issued by the California Education Audit Appeals Panel. The purpose of this audit was to determine whether the District properly reported and utilized the School Facility Program savings in accordance with the applicable program requirements.

On April 16, 2026, the Office of Public School Construction (OPSC), through the California Department of General Services (DGS), notified the District that the project was subject to annual School Facility Program savings reporting pursuant to Education Code Section 41024.

CLOSE-OUT SAVINGS AUDIT

**HAPPY VALLEY ELEMENTARY SCHOOL DISTRICT - HAPPY VALLEY ELEMENTARY SCHOOL
SCHOOL FACILITY PROGRAM (SFP) CLOSE-OUT SAVINGS AUDIT REPORT
OBJECTIVE, SCOPE, METHODOLOGY, AND CONCLUSION**

OBJECTIVES, SCOPE, METHODOLOGY, AND CONCLUSION

Audit Objective

Determine whether the District properly identified, calculated, and reported School Facility Program project savings and prepared the accompanying Schedule of Use of Savings in accordance with the applicable requirements of the Leroy F. Greene School Facilities Act of 1998 (Chapter 12.5, commencing with Section 17070.10, of Part 10 of Division 1 of Title 1 of the California Education Code), applicable regulations, grant agreements, and the *2025-26 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting - Appendix B*, issued by the California Education Audit Appeals Panel.

Audit Scope

Our close-out savings audit was carried out in accordance with standards generally accepted *Government Auditing Standards*. The scope of our audit included the District's Schedule of School Facility Program (SFP) Use of Savings Summary and the related supporting documentation, the Detailed Listing of Project Expenditures (DLOPE) obtained from the Office of Public School Construction (OPSC) for the reporting period related to the use of School Facility Program savings.

The District reported School Facility Program savings usage totaling \$181,695. Pursuant to Education Code Section 41024, projects receiving School Facility Program funding after June 30, 2017 are subject to a savings audit in accordance with the *Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting - Appendix B*, issued by the California Education Audit Appeals Panel. Happy Valley Elementary School received School Facility Program funding on June 8, 2020; therefore, the project is subject to a savings audit.

The total School Facility Program savings reported on the Schedule of Use of Savings were \$181,695. During the reporting period, the District fully expended these savings on an eligible High Priority Capital Outlay Project consisting of bathroom improvements.

Audit Methodology

We obtained the Schedule of School Facility Program (SFP) Use of Savings Summary, the final Detailed Listing of Project Expenditures (DLOPE) from the Office of Public School Construction (OPSC), and the District's corresponding general ledger for Financial Hardship Project No. 57/69757-00-001. We performed the following procedures:

- Verified that the District maintained accounting records supporting the School Facility Program project and the related Schedule of Use of Savings.
- Reconciled the final project expenditures reported on the DLOPE to the District's general ledger.
- Verified the calculation of the School Facility Program project savings reported on the Schedule of Use of Savings.

**HAPPY VALLEY ELEMENTARY SCHOOL DISTRICT - HAPPY VALLEY ELEMENTARY SCHOOL
SCHOOL FACILITY PROGRAM (SFP) CLOSE-OUT SAVINGS AUDIT REPORT
OBJECTIVE, SCOPE, METHODOLOGY, AND CONCLUSION**

Audit Methodology - Cont'd

- Inspected supporting documentation to determine that the reported project savings were used for an eligible Project in accordance with the requirements of the Leroy F. Greene School Facilities Act of 1998, applicable State Allocation Board regulations, Office of Public School Construction (OPSC) guidance, and the *2025-26 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting - Appendix B*.
- Traced the expenditures charged against the project savings to supporting invoices, payment records, contracts, and other relevant documentation.
- Verified that the expenditures funded from the project savings were properly authorized, accurately recorded in the District's accounting records, and supported by appropriate documentation.
- Reviewed the Schedule of Use of Savings to determine that all available School Facility Program savings were appropriately reported and utilized in accordance with applicable program requirements.

Conclusion

The results of our tests indicated that, in all significant respects, the District has properly prepared the Schedule of Use of Savings for Project No. 57/69757-00-001 and properly utilized the reported savings for the Bathroom Project - General Construction in accordance with the applicable requirements of the School Facility Program and Office of Public School Construction (OPSC) guidance. Our testing confirmed that the expenditures were supported by invoices/contracts and met the applicable eligibility requirements.

SUMMARY OF AUDIT SCHEDULES

**HAPPY VALLEY ELEMENTARY SCHOOL DISTRICT - HAPPY VALLEY ELEMENTARY SCHOOL
DETERMINATION OF SAVINGS
PROJECT NO. 57/69757-00-001**

	Original Project Savings Determined at Closeout Audit	Remaining Savings Balance to Date	Savings Used Reported This Period	Balance of Unused Savings
Amount reported	\$ 181,695	\$ 181,695	\$ 181,695	\$ -
Amount audited	181,695	181,695	181,695	-
Difference	\$ -	\$ -	\$ -	\$ -

HAPPY VALLEY ELEMENTARY SCHOOL DISTRICT - HAPPY VALLEY ELEMENTARY SCHOOL
SCHEDULE OF SCHOOL FACILITY PROGRAM DETERMINATION OF PROJECT SAVINGS
PROJECT NO. 57/69757-00-001

	<u>Reported</u>	<u>Audited</u>	<u>Difference</u>
A. State Share: Grant Amount (do not include site acquisition, relocation assistance, hazardous waste removal, or DTSC grants in this figure)	\$ 1,118,975	\$ 1,118,975	\$ -
B. Plus District Contribution	14,861	14,861	-
C. Plus Financial Hardship Apportionment	<u>731,122</u>	<u>731,122</u>	-
D. District Share: (B + C)	745,983	745,983	-
E. Plus Interest Earned on State Funds	<u>50,686</u>	<u>50,686</u>	-
F. Amounts Financed (A + D + E = F)	<u>\$ 1,915,644</u>	<u>\$ 1,915,644</u>	<u>\$ -</u>
G. Reported Expenditures to Office of Public School Construction (do not include expenditures related to site acquisition, relocation assistance, hazardous waste removal, or DTSC grants in this figure):	<u>1,733,949</u>	<u>1,733,949</u>	-
H. Amount Overspent (if reported expenditures more than amounts financed) (G - F = H)	-	-	-
I. Amount of Savings (if reported expenditures less than amounts financed) (F - G = I)	<u>\$ 181,695</u>	<u>\$ 181,695</u>	<u>\$ -</u>

SCHOOL FACILITY PROGRAM (SFP) CLOSE-OUT SAVINGS AUDIT REPORT

PROJECT NUMBER: 57/69757-00-001

SCHOOL NAME: HAPPY VALLEY ELEMENTARY SCHOOL

SCHEDULE OF SCHOOL FACILITY PROGRAM - SUMMARY OF AUDIT FINDINGS

No audit findings were noted.

**Santa Cruz County Office of Education
Business Services Department**

**PUBLIC DISCLOSURE OF COLLECTIVE BARGAINING AGREEMENT
in Accordance with AB 1200 (Chapter 1213/1991), GC 3547.5, and CCR, Title V, Section 15449**

Name of School District: Happy Valley Elementary School District
 Name of Bargaining Unit: Happy Valley Education Association
 Certificated or Classified: Certificated

The proposed agreement covers the period beginning: July 1, 2026 and ending: June 30, 2028
 (date) (date)

The Governing Board will act upon this agreement on: August 12, 2026
 (date)

Note: This form, along with a copy of the proposed agreement, must be submitted to the county office at least ten (10) working days prior to the date the governing board will take action.

A. Proposed Change in Compensation

Compensation	Annual Cost Prior to Proposed Agreement FY	Fiscal Impact of Proposed Agreement		
		Year 1 Increase/(Decrease) FY	Year 2 Increase/(Decrease) FY	Year 3 Increase/(Decrease) FY
1 Salary Schedule Increase (Decrease)	\$598,513	\$17,955		
		3.00%	0.00%	0.00%
2 Step and Column - Increase (Decrease) Due to movement plus any changes due to settlement				
		0.00%	0.00%	0.00%
3 Other Compensation - Increase (Decrease)(Stipends, Bonuses, Longevity, Overtime, etc.)				
**Included in base above				
Description of other compensation				
4 Statutory Benefits - STRS, PERS, FICA, WC, UI, Medicate etc.	\$134,859	\$4,046		
		3.00%	0.00%	0.00%
5 Health/Welfare Plans	\$144,067			
		0.00%	0.00%	0.00%
6 Total Compensation - Increase (Decrease) (Total Lines 1-5)	\$877,439	\$22,001	\$0	\$0
7 Total Number of Represented Employees (Use FTEs if appropriate)	9.07			
8 Total Compensation <u>Average</u> Cost per Employee	\$ 96,740.81	\$ 2,425.71	\$ -	\$ -
		2.51%	0.00%	0.00%

I. IMPACT OF PROPOSED AGREEMENT ON SUBSEQUENT YEARS

Happy Valley Elementary School District

MYP - Restricted General Fund Happy Valley Education Association

	2025-26	2026-27	2027-28
	Total Current Budget After Settlement	First Subsequent Year After Settlement	Second Subsequent Year After Settlement
REVENUES			
Local Control Funding Formula (8010-8099)	\$ -	\$ -	\$ -
Remaining Revenues (8100-8799)	\$ 422,739.79	\$ 376,759.95	\$ 374,712.00
TOTAL REVENUES	\$ 422,739.79	\$ 376,759.95	\$ 374,712.00
EXPENDITURES			
Certificated Salaries (1000-1999)	\$ 132,861.50	\$ 94,674.67	\$ 95,934.67
Classified Salaries (2000-2999)	\$ 43,882.90	\$ 31,497.41	\$ 30,180.65
Employee Benefits (3000-3999)	\$ 118,795.52	\$ 108,635.33	\$ 108,728.14
Books and Supplies (4000-4999)	\$ 78,710.00	\$ 14,145.75	\$ 14,853.04
Services, Other Operating Expenses (5000-5999)	\$ 259,366.60	\$ 205,988.94	\$ 215,812.04
Capital Outlay (6000-6999)	\$ -	\$ -	\$ -
Other Outgo (7100-7299) (7400-7499)	\$ 2,550.00	\$ 2,550.00	\$ 2,550.00
Direct Support/Indirect Cost (7300-7399)	\$ 9,044.00	\$ 9,044.00	\$ 9,044.00
Other Adjustments		\$ -	\$ -
TOTAL EXPENDITURES	\$ 645,210.52	\$ 466,536.10	\$ 477,102.54
OPERATING SURPLUS (DEFICIT)	\$ (222,470.73)	\$ (89,776.15)	\$ (102,390.54)
TRANSFERS IN & OTHER SOURCES (8910-8979)	\$ -	\$ -	\$ -
TRANSFERS OUT & OTHER USES (7610-7699)	\$ -	\$ -	\$ -
CONTRIBUTIONS (8980-8999)	\$ 104,084.34	\$ 114,361.84	\$ 123,500.97
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	\$ (118,386.39)	\$ 24,585.69	\$ 21,110.43
BEGINNING BALANCE	\$ 190,372.40	\$ 71,986.01	\$ 96,571.70
CURRENT-YEAR ENDING BALANCE	\$ 71,986.01	\$ 96,571.70	\$ 117,682.13
COMPONENTS OF ENDING BALANCE:			
Nonspendable Amounts (9711-9739)	\$ -	\$ -	\$ -
Restricted Amounts (9740)	\$ 76,082.12	\$ 96,571.70	\$ 117,682.13
Reserves for Economic Uncertainties (9789)		\$ -	\$ -
Committed Amounts (9750-9760)	\$ -	\$ -	\$ -
Assigned Amounts (9775-9780)	\$ -	\$ -	\$ -
Unassigned Amount Unrestricted (9790)	\$ (4,096.11)	\$ -	\$ -
Unassigned Amount - Restricted (9790)			

9. What was the negotiated percentage increase approved? For example, if the increase in "Year 1" was for less than a full year, what is the annualized percentage of that increase for "Year 1"?

The increase is 3% for 2026-27

10. Were any additional steps, columns, or ranges added to the schedules? (If yes, please explain.)

No

11. Please include comments and explanations as necessary.

12. Does this bargaining unit have a negotiated cap for Health and Welfare benefits? Yes ☒ No ☐

If yes, please describe the cap amount.

The district covers \$1600 per month for full time employees

B. Proposed Negotiated Changes in Noncompensation Items (i.e., class size adjustments, etc.)

The district has added clarification language for evaluations

- C. What are the specific impacts on instructional and support programs to accommodate the settlement?**
Please indicate the status of these changes: 1) planning stage, 2) in-progress, or 3) adopted. Include the impact of changes such as staff reductions or increases, program reductions or increases, elimination or expansion of other services or programs (i.e., counselors, librarians, custodial staff, etc.)

None

- D. What contingency language is included in the proposed agreement?** Include specific areas identified reopeners, applicable fiscal years, and specific contingency language.

No contingency language

- E. Will this agreement create, increase or decrease deficit spending in the current or subsequent year(s)?** "Deficit spending" is defined to exist when a fund's expenditures and other financing uses exceed its revenues and other financing sources in a given year. If yes, explain the amounts and justification for doing so.

This will increase deficit spending in current and future years. The district has a fund balance that will be able to absorb the increase in all 3 years. This increase was necessary to recruit and retain qualified teachers.

- F. Describe other major provisions that do not directly affect the district's costs, such as binding arbitrations, grievance procedures, etc. Please disclose any other components of the agreement which may or may not affect the district's fund balance in future years.**

Language has been agreed to pay \$40 per hour for additional work for teachers. Currently there is no data to show the potential impact but this could impact the districts fund balance in future years.

- G. Source of Funding for Proposed Agreement**

1. Current Year

2% of the 3% certificated salaries paid from parcel tax.

2. If this is a single year agreement, how will the on-going cost of the proposed agreement be funded in subsequent years (i.e., what will allow the district to afford this contract)?

Fund balance will be used to cover the costs in the subsequent years

3. If this is a multiyear agreement, what is the source of funding, including assumptions used, to fund these obligations in subsequent years? (Remember to include compounding effects in meeting obligations.)

N/A

H. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET**Happy Valley Elementary School District****Unrestricted General Fund**

Bargaining Unit:

Happy Valley Education Association

	Column 1	Column 2	Column 3	Column 4
	Latest Board-Approved Budget Before Settlement 6/22/2026	Adjustments as a Result of Settlement	Other Revisions	Total Current Budget (Columns 1+2+3)
REVENUES				
Local Control Funding Formula (8010-8099)	\$ 1,483,492.00	\$ -	\$ -	\$ 1,483,492.00
Remaining Revenues (8100-8799)	\$ 107,339.68	\$ -	\$ -	\$ 107,339.68
TOTAL REVENUES	\$ 1,590,831.68	\$ -	\$ -	\$ 1,590,831.68
EXPENDITURES				
Certificated Salaries (1000-1999)	\$ 741,250.11	\$ 16,215.15	\$ -	\$ 757,465.26
Classified Salaries (2000-2999)	\$ 210,034.66	\$ -	\$ 6,510.40	\$ 216,545.06
Employee Benefits (3000-3999)	\$ 386,180.05	\$ 3,648.68	\$ 2,085.06	\$ 391,913.79
Books and Supplies (4000-4999)	\$ 10,029.02	\$ -	\$ -	\$ 10,029.02
Services, Other Operating Expenses (5000-5999)	\$ 191,338.20	\$ -	\$ -	\$ 191,338.20
Capital Outlay (6000-6599)	\$ -	\$ -	\$ -	\$ -
Other Outgo (7100-7299) (7400-7499)	\$ 35,078.04	\$ -	\$ -	\$ 35,078.04
Direct Support/Indirect Cost (7300-7399)	\$ (9,044.00)	\$ -	\$ -	\$ (9,044.00)
Other Adjustments				
TOTAL EXPENDITURES	\$ 1,564,866.08	\$ 19,863.83	\$ 8,595.46	\$ 1,593,325.37
OPERATING SURPLUS (DEFICIT)	\$ 25,965.60	\$ (19,863.83)	\$ (8,595.46)	\$ (2,493.69)
TRANSFERS IN & OTHER SOURCES (8910-8979)	\$ 63,562.36	\$ -	\$ -	\$ 63,562.36
TRANSFERS OUT & OTHER USES (7610-7699)	\$ -	\$ -	\$ -	\$ -
CONTRIBUTIONS (8980-8999)	\$ (102,615.12)	\$ (1,469.22)	\$ -	\$ (104,084.34)
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	\$ (13,087.16)	\$ (21,333.05)	\$ (8,595.46)	\$ (43,015.67)
BEGINNING BALANCE	\$ 565,267.11			\$ 565,267.11
Prior-Year Adjustments/Restatements (9793/9795)	\$ -			\$ -
CURRENT-YEAR ENDING BALANCE	\$ 552,179.95	\$ (21,333.05)	\$ (8,595.46)	\$ 522,251.44
COMPONENTS OF ENDING BALANCE:				
Nonspendable Amounts (9711-9739)	\$ -	\$ -	\$ -	\$ -
Restricted Amounts (9740)				
Reserves for Economic Uncertainties (9789)	\$ -	\$ -	\$ -	\$ -
Committed Amounts (9750-9760)	\$ -	\$ -	\$ -	\$ -
Assigned Amounts (9780)	\$ -	\$ -	\$ -	\$ -
Unassigned Amount (9790)	\$ 552,179.95	\$ (21,333.05)	\$ (8,595.46)	\$ 522,251.44

* Please see question on page 7.

H. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET

Happy Valley Elementary School District

Restricted General Fund

Bargaining Unit:

Happy Valley Education Association

	Column 1	Column 2	Column 3	Column 4
	Latest Board- Approved Budget Before Settlement 6/22/2026	Adjustments as a Result of Settlement	Other Revisions	Total Current Budget (Columns 1+2+3)
REVENUES				
Local Control Funding Formula (8010-8099)	\$ -	\$ -	\$ -	\$ -
Remaining Revenues (8100-8799)	\$ 422,739.79	\$ -	\$ -	\$ 422,739.79
TOTAL REVENUES	\$ 422,739.79	\$ -	\$ -	\$ 422,739.79
EXPENDITURES				
Certificated Salaries (1000-1999)	\$ 130,417.66	\$ 1,740.29	\$ 703.55	\$ 132,861.50
Classified Salaries (2000-2999)	\$ 41,951.08	\$ -	\$ 1,931.82	\$ 43,882.90
Employee Benefits (3000-3999)	\$ 117,605.85	\$ 397.10	\$ 792.57	\$ 118,795.52
Books and Supplies (4000-4999)	\$ 78,710.00	\$ -	\$ -	\$ 78,710.00
Services, Other Operating Expenses (5000-5999)	\$ 259,366.60	\$ -	\$ -	\$ 259,366.60
Capital Outlay (6000-6599)	\$ -	\$ -	\$ -	\$ -
Other Outgo (7100-7299) (7400-7499)	\$ 2,550.00	\$ -	\$ -	\$ 2,550.00
Direct Support/Indirect Cost (7300-7399)	\$ 9,044.00	\$ -	\$ -	\$ 9,044.00
Other Adjustments				
TOTAL EXPENDITURES	\$ 639,645.19	\$ 2,137.39	\$ 3,427.94	\$ 645,210.52
OPERATING SURPLUS (DEFICIT)	\$ (216,905.40)	\$ (2,137.39)	\$ (3,427.94)	\$ (222,470.73)
TRANSFERS IN & OTHER SOURCES (8910-8979)	\$ -	\$ -	\$ -	\$ -
TRANSFERS OUT & OTHER USES (7610-7699)	\$ -	\$ -	\$ -	\$ -
CONTRIBUTIONS (8980-8999)	\$ 102,615.12	\$ 1,469.22	\$ -	\$ 104,084.34
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	\$ (114,290.28)	\$ (668.17)	\$ (3,427.94)	\$ (118,386.39)
BEGINNING BALANCE	\$ 190,372.40			\$ 190,372.40
Prior-Year Adjustments/Restatements (9793/9795)	\$ -			\$ -
CURRENT-YEAR ENDING BALANCE	\$ 76,082.12	\$ (668.17)	\$ (3,427.94)	\$ 71,986.01
COMPONENTS OF ENDING BALANCE:				
Nonspendable Amounts (9711-9739)	\$ -	\$ -	\$ -	\$ -
Restricted Amounts (9740)	\$ 76,082.12	\$ -	\$ -	\$ 76,082.12
Committed Amounts (9750-9760)	\$ -	\$ -	\$ -	\$ -
Assigned Amounts (9775-9780)	\$ -	\$ -	\$ -	\$ -
Unassigned Amount (9790)	\$ -	\$ (668.17)	\$ (3,427.94)	\$ (4,096.11)
		\$ -	\$ -	

* Please see question on page 7.

H. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET

Happy Valley Elementary School District

Combined General Fund

Bargaining Unit:

Happy Valley Education Association

	Column 1 Latest Board- Approved Budget Before Settlement 6/22/2026	Column 2 Adjustments as a Result of Settlement	Column 3 Other Revisions	Column 4 Total Current Budget (Columns 1+2+3)
REVENUES				
Local Control Funding Formula (8010-8099)	\$ 1,483,492.00	\$ -	\$ -	\$ 1,483,492.00
Remaining Revenues (8100-8799)	\$ 530,079.47	\$ -	\$ -	\$ 530,079.47
TOTAL REVENUES	\$ 2,013,571.47	\$ -	\$ -	\$ 2,013,571.47
EXPENDITURES				
Certificated Salaries (1000-1999)	\$ 871,667.77	\$ 17,955.44	\$ 703.55	\$ 890,326.76
Classified Salaries (2000-2999)	\$ 251,985.74	\$ -	\$ 8,442.22	\$ 260,427.96
Employee Benefits (3000-3999)	\$ 503,785.90	\$ 4,045.78	\$ 2,877.63	\$ 510,709.31
Books and Supplies (4000-4999)	\$ 88,739.02	\$ -	\$ -	\$ 88,739.02
Services, Other Operating Expenses (5000-5999)	\$ 450,704.80	\$ -	\$ -	\$ 450,704.80
Capital Outlay (6000-6599)	\$ -	\$ -	\$ -	\$ -
Other Outgo (7100-7299) (7400-7499)	\$ 37,628.04	\$ -	\$ -	\$ 37,628.04
Direct Support/Indirect Cost (7300-7399)	\$ -	\$ -	\$ -	\$ -
Other Adjustments				
TOTAL EXPENDITURES	\$ 2,204,511.27	\$ 22,001.22	\$ 12,023.40	\$ 2,238,535.89
OPERATING SURPLUS (DEFICIT)	\$ (190,939.80)	\$ (22,001.22)	\$ (12,023.40)	\$ (224,964.42)
TRANSFERS IN & OTHER SOURCES (8910-8979)	\$ 63,562.36	\$ -	\$ -	\$ 63,562.36
TRANSFERS OUT & OTHER USES (7610-7699)	\$ -	\$ -	\$ -	\$ -
CONTRIBUTIONS (8980-8999)	\$ -	\$ -	\$ -	\$ -
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	\$ (127,377.44)	\$ (22,001.22)	\$ (12,023.40)	\$ (161,402.06)
BEGINNING BALANCE	\$ 755,639.51			\$ 755,639.51
Prior-Year Adjustments/Restatements (9793/9795)	\$ -			\$ -
CURRENT-YEAR ENDING BALANCE	\$ 628,262.07	\$ (22,001.22)	\$ (12,023.40)	\$ 594,237.45
COMPONENTS OF ENDING BALANCE:				
Nonspendable Amounts (9711-9739)	\$ -	\$ -	\$ -	\$ -
Restricted Amounts (9740)	\$ 76,082.12	\$ -	\$ -	\$ 76,082.12
Reserves for Economic Uncertainties (9789)	\$ -	\$ -	\$ -	\$ -
Committed Amounts (9750-9760)	\$ -	\$ -	\$ -	\$ -
Assigned Amounts (9775-9780)	\$ -	\$ -	\$ -	\$ -
Unassigned Amount (9790)	\$ 552,179.95	\$ (21,333.05)	\$ (8,595.46)	\$ 522,251.44
Unassigned Amount - Restricted (9790)				
Reserve for Economic Uncertainties Percentage	25%			23%

* Please see question on page 7.

H. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET

FUND FundCode

Enter Fund Name and Fund Number of Other Impacted Funds				
Happy Valley Education Association				
	Column 1	Column 2	Column 3	Column 4
	Latest Board- Approved Budget Before Settlement 6/22/2026	Adjustments as a Result of Settlement	Other Revisions	Total Current Budget (Columns 1+2+3)
REVENUES				
Local Control Funding Formula (8010-8099)	\$ -			\$ -
Remaining Revenues (8100-8799)	\$ -			\$ -
TOTAL REVENUES	\$ -	\$ -	\$ -	\$ -
EXPENDITURES				
Certificated Salaries (1000-1999)	\$ -			\$ -
Classified Salaries (2000-2999)	\$ -			\$ -
Employee Benefits (3000-3999)	\$ -			\$ -
Books and Supplies (4000-4999)	\$ -			\$ -
Services, Other Operating Expenses (5000-5999)	\$ -			\$ -
Capital Outlay (6000-6599)	\$ -			\$ -
Other Outgo (7100-7299) (7400-7499)	\$ -			\$ -
Direct Support/Indirect Cost (7300-7399)	\$ -			\$ -
Other Adjustments				
TOTAL EXPENDITURES	\$ -	\$ -	\$ -	\$ -
OPERATING SURPLUS (DEFICIT)	\$ -	\$ -	\$ -	\$ -
TRANSFERS IN & OTHER SOURCES (8910-8979)	\$ -			\$ -
TRANSFERS OUT & OTHER USES (7610-7699)	\$ -			\$ -
CONTRIBUTIONS (8980-8999)	\$ -			\$ -
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	\$ -	\$ -	\$ -	\$ -
BEGINNING BALANCE	\$ -			\$ -
Prior-Year Adjustments/Restatements (9793/9795)	\$ -			\$ -
CURRENT-YEAR ENDING BALANCE	\$ -	\$ -	\$ -	\$ -
COMPONENTS OF ENDING BALANCE:				
Nonspendable Amounts (9711-9739)	\$ -			\$ -
Restricted Amounts (9740)	\$ -			\$ -
Reserves for Economic Uncertainties (9789)	\$ -			\$ -
Committed Amounts (9750-9760)	\$ -			\$ -
Assigned Amounts (9775-9780)	\$ -			\$ -
Unassigned Amount (9790)	\$ -	\$ -	\$ -	\$ -
Unassigned Amount - Restricted (9790)				\$ -
Reserve for Economic Uncertainties Percentage				

* Please see question on page 7.

I. IMPACT OF PROPOSED AGREEMENT ON SUBSEQUENT YEARS

Happy Valley Elementary School District

MYP - Unrestricted General Fund

Happy Valley Education Association

	2025-26	2026-27	2027-28
	Total Current Budget After Settlement	First Subsequent Year After Settlement	Second Subsequent Year After Settlement
REVENUES			
Local Control Funding Formula (8010-8099)	\$ 1,483,492.00	\$ 1,524,012.00	\$ 1,566,411.00
Remaining Revenues (8100-8799)	\$ 107,339.68	\$ 106,223.68	\$ 105,224.68
TOTAL REVENUES	\$ 1,590,831.68	\$ 1,630,235.68	\$ 1,671,635.68
EXPENDITURES			
Certificated Salaries (1000-1999)	\$ 757,465.26	\$ 791,419.73	\$ 795,933.73
Classified Salaries (2000-2999)	\$ 216,545.06	\$ 229,913.90	\$ 231,230.66
Employee Benefits (3000-3999)	\$ 391,913.79	\$ 399,836.32	\$ 400,972.32
Books and Supplies (4000-4999)	\$ 10,029.02	\$ 10,530.47	\$ 11,056.99
Services, Other Operating Expenses (5000-5999)	\$ 191,338.20	\$ 205,524.61	\$ 216,239.24
Capital Outlay (6000-6999)	\$ -	\$ -	\$ -
Other Outgo (7100-7299) (7400-7499)	\$ 35,078.04	\$ 35,078.04	\$ 35,078.04
Direct Support/Indirect Cost (7300-7399)	\$ -	\$ (9,044.00)	\$ (9,044.00)
Other Adjustments	\$ -	\$ -	\$ -
TOTAL EXPENDITURES	\$ 1,602,369.37	\$ 1,663,259.07	\$ 1,681,466.98
OPERATING SURPLUS (DEFICIT)	\$ (11,537.69)	\$ (33,023.39)	\$ (9,831.30)
TRANSFERS IN & OTHER SOURCES (8910-8979)	\$ 63,562.36	\$ 76,931.20	\$ 76,931.20
TRANSFERS OUT & OTHER USES (7610-7699)	\$ -	\$ -	\$ -
CONTRIBUTIONS (8980-8999)	\$ (104,084.34)	\$ (114,361.84)	\$ (123,500.97)
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	\$ (52,059.67)	\$ (70,454.03)	\$ (56,401.07)
BEGINNING BALANCE	\$ 565,267.11	\$ 522,251.44	\$ 451,797.41
CURRENT-YEAR ENDING BALANCE	\$ 522,251.44	\$ 451,797.41	\$ 395,396.34
COMPONENTS OF ENDING BALANCE:			
Nonspendable Amounts (9711-9739)	\$ -	\$ -	\$ -
Restricted Amounts (9740)	\$ -	\$ -	\$ -
Reserves for Economic Uncertainties (9789)	\$ -	\$ -	\$ -
Committed Amounts (9750-9760)	\$ -	\$ -	\$ -
Assigned Amounts (9780)	\$ -	\$ -	\$ -
Unassigned Amount Unrestricted (9790)	\$ 522,251.44	\$ 451,797.41	\$ 395,396.34
Unassigned Amount - Restricted (9790)			

I. IMPACT OF PROPOSED AGREEMENT ON SUBSEQUENT YEARS

Happy Valley Elementary School District

MYP - Combined General Fund

Happy Valley Education Association

	2025-26	2026-27	2027-28
	Total Current Budget After Settlement	First Subsequent Year After Settlement	Second Subsequent Year After Settlement
REVENUES			
Local Control Funding Formula (8010-8099)	\$ 1,483,492.00	\$ 1,524,012.00	\$ 1,566,411.00
Remaining Revenues (8100-8799)	\$ 530,079.47	\$ 482,983.63	\$ 479,936.68
TOTAL REVENUES	\$ 2,013,571.47	\$ 2,006,995.63	\$ 2,046,347.68
EXPENDITURES			
Certificated Salaries (1000-1999)	\$ 890,326.76	\$ 886,094.40	\$ 891,868.40
Classified Salaries (2000-2999)	\$ 260,427.96	\$ 261,411.31	\$ 261,411.31
Employee Benefits (3000-3999)	\$ 510,709.31	\$ 508,471.65	\$ 509,700.46
Books and Supplies (4000-4999)	\$ 88,739.02	\$ 24,676.22	\$ 25,910.03
Services, Other Operating Expenses (5000-5999)	\$ 450,704.80	\$ 411,513.55	\$ 432,051.28
Capital Outlay (6000-6999)	\$ -	\$ -	\$ -
Other Outgo (7100-7299) (7400-7499)	\$ 37,628.04	\$ 37,628.04	\$ 37,628.04
Direct Support/Indirect Cost (7300-7399)	\$ -	\$ -	\$ -
Other Adjustments		\$ -	\$ -
TOTAL EXPENDITURES	\$ 2,238,535.89	\$ 2,129,795.17	\$ 2,158,569.52
OPERATING SURPLUS (DEFICIT)	\$ (224,964.42)	\$ (122,799.54)	\$ (112,221.84)
TRANSFERS IN & OTHER SOURCES (8910-8979)	\$ 63,562.36	\$ 76,931.20	\$ 76,931.20
TRANSFERS OUT & OTHER USES (7610-7699)	\$ -	\$ -	\$ -
CONTRIBUTIONS (8980-8999)	\$ -	\$ -	\$ -
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	\$ (170,446.06)	\$ (45,868.34)	\$ (35,290.64)
BEGINNING BALANCE	\$ 755,639.51	\$ 594,237.45	\$ 548,369.11
CURRENT-YEAR ENDING BALANCE	\$ 594,237.45	\$ 548,369.11	\$ 513,078.47
COMPONENTS OF ENDING BALANCE:			
Nonspendable Amounts (9711-9739)	\$ -	\$ -	\$ -
Restricted Amounts (9740)	\$ 76,082.12	\$ 96,572	\$ 117,682
Reserves for Economic Uncertainties (9789)	\$ -	\$ -	\$ -
Committed Amounts (9750-9760)	\$ -	\$ -	\$ -
Assigned Amounts (9775-9780)	\$ -	\$ -	\$ -
Unassigned Amount Unrestricted (9790)	\$ 518,155.33	\$ 451,797	\$ 395,396
Unassigned Amount - Restricted (9790)			

J. IMPACT OF PROPOSED AGREEMENT ON UNRESTRICTED RESERVES**1. State Reserve Standard**

		2025-26	2026-27	2027-28
a.	Total Expenditures, Transfers Out, and Uses (Including Cost of Proposed Agreement)	\$ 2,238,535.89	\$ 2,129,795.17	\$ 2,158,569.52
b.	State Standard Minimum Reserve Percentage for this District:	3%	3%	3%
c.	State Standard Minimum Reserve Amount for this District (For districts with less than 1,001 ADA, this is the greater of Line a, times Line b. OR \$90,000.)	\$ 90,000	\$ 90,000	\$ 90,000

2. Budgeted Unrestricted Reserve (After Impact of Proposed Agreement)

a.	General Fund Budgeted <u>Unrestricted</u> Reserve for Economic Uncertainties (9789)	\$ -	\$ -	\$ -
b.	General Fund Budgeted <u>Unrestricted</u> Unassigned Amount (9790)	\$ 518,155.33	\$ 451,797.41	\$ 395,396.34
c.	Special Reserve Fund (Fund 17) Budgeted Reserves for Economic Uncertainties (9789)	\$ -	\$ -	\$ -
d.	Special Reserve Fund (Fund 17) Budgeted Unassigned Amount (9790)	\$ -	\$ -	\$ -
g.	Total Available Reserves	\$ 518,155.33	\$ 451,797.41	\$ 395,396.34
h.	Reserve for Economic Uncertainties Percentage	23.15%	21.21%	18.32%

3. Do unrestricted reserves meet the state minimum reserve amount?

2025-26

Yes

☒

No

☐

2026-27

Yes

☒

No

☐

2027-28

Yes

☒

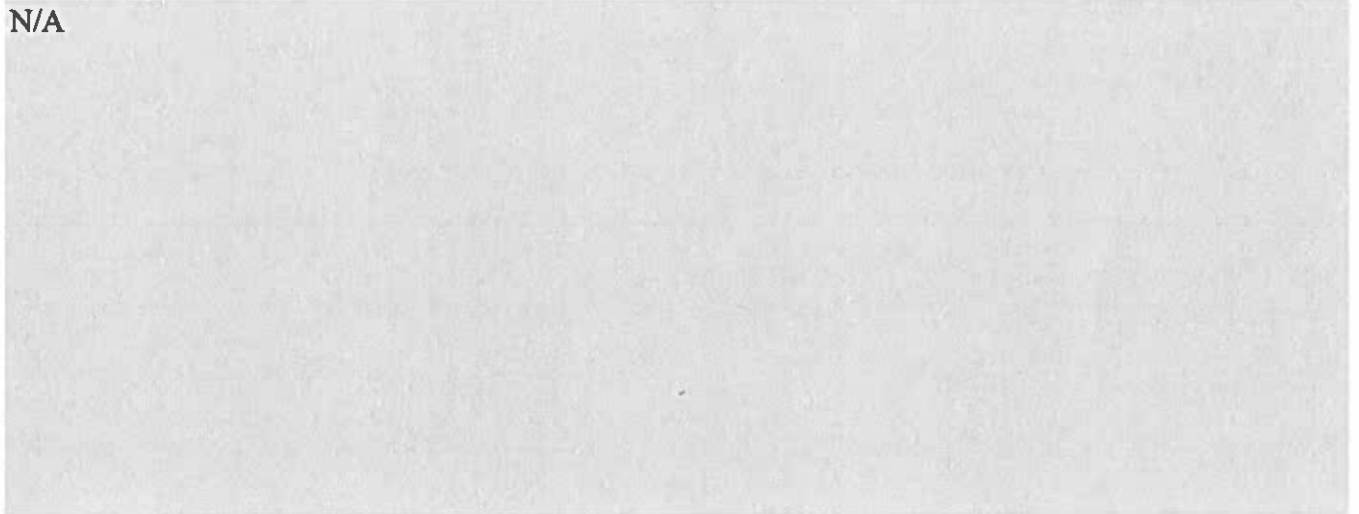
No

☐**4. If not, how do you plan to restore your reserves?**

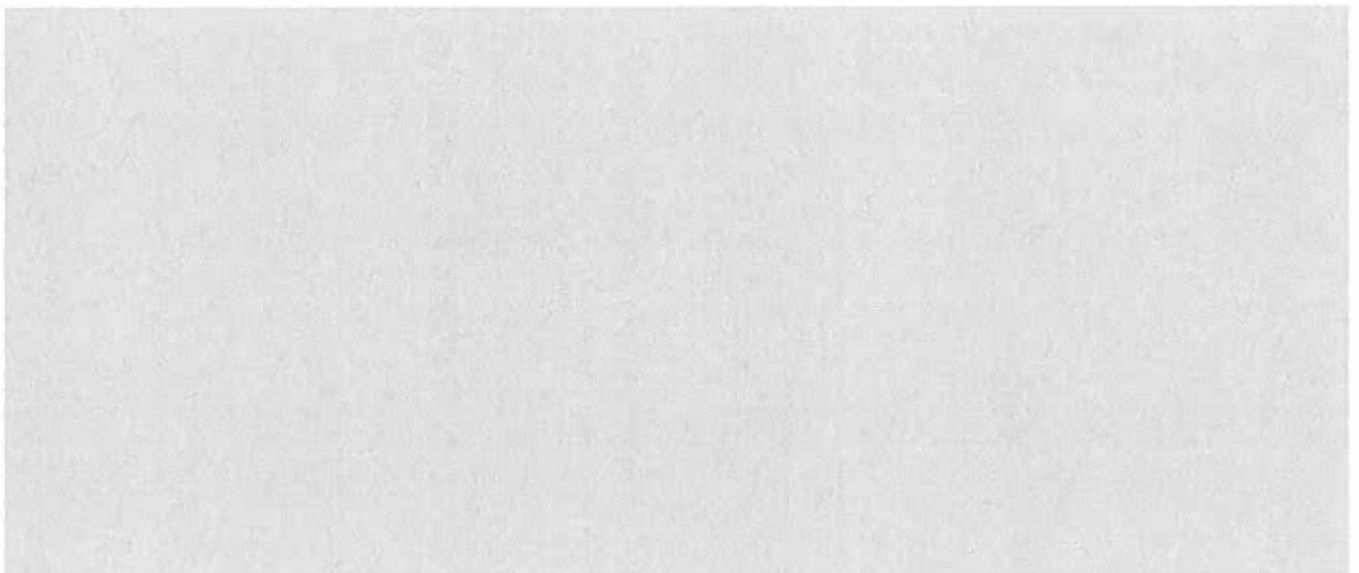
- If the total amount of the adjustment in Column 2 on Page 4c does not agree with the amount of the
5. Total

Compensation Increase in Section A, Line 5, Page 1 (i.e., increase was partially budgeted), explain the variance below:

N/A



6. Please include any additional comments and explanations of Page 4 as necessary or any other information that you want to provide to assist us in our analysis.



L. CERTIFICATION NO. 1: CERTIFICATION OF THE DISTRICT'S ABILITY TO MEET THE COSTS OF COLLECTIVE BARGAINING AGREEMENT

The disclosure document must be signed by the district Superintendent and Chief Business Officer at the time of public disclosure.

In accordance with the requirements of Government Code Section 3547.5, the Superintendent and Chief Business Officer of Happy Valley Elementary School District (District), hereby certify that the District can meet the costs incurred under the Collective Bargaining Agreement between the District and the Happy Valley Education Association Bargaining Unit, during the term of the agreement from July 1, 2026 to June 30, 2028.

The budget revisions necessary to meet the costs of the agreement in each year of its term are as follows:

Budget Adjustment Categories:

Unrestricted Revenues/Other Financing Sources

**Budget Adjustment
Increase (Decrease)**

\$ 1,469.22

Unrestricted Expenditures/Other Financing Uses

\$ 19,863.83

Unrestricted Ending Balance Increase (Decrease)

\$ (21,333.05)

Restricted Revenues/Other Financing Sources

\$ 1,469.22

Restricted Expenditures/Other Financing Uses

\$ 2,137.39

Restricted Ending Balance Increase (Decrease)

\$ (668.17)

N/A (No budget revisions necessary)



District Superintendent
(Signature)

7/28/26

Date

Chief Business Officer
(Signature)

Date

M. CERTIFICATION NO. 2

The disclosure document must be signed by the district Superintendent or designee at the time of public disclosure and by the President or Clerk of the Governing Board at the time of formal board action on the proposed agreement.

The information provided in this document summarizes the financial implications of the proposed agreement and is submitted to the Governing Board for public disclosure of the major provisions of the agreement (as provided in the "Public Disclosure of Proposed Bargaining Agreement") in accordance with the requirements of AB 1200 and Government Code Section 3547.5.

District Superintendent (or Designee)
(Signature)

Date

Michelle Stewart
Contact Person

(831) 429-1456
Phone

After public disclosure of the major provisions contained in this summary, the Governing Board at its meeting on August 12, 2026, took action to approve the proposed Agreement with the Happy Valley Education Association Bargaining Unit.

President (or Clerk), Governing Board
(Signature)

Date

Special Note: The Santa Cruz County Office of Education may request additional information, as necessary, to review the district's compliance with requirements.



SANTA CRUZ
COUNTY OFFICE OF
EDUCATION
DR. FARIS SABBAB • SUPERINTENDENT OF SCHOOLS

BOARD OF EDUCATION

Mr. Ed Acosta
Dr. Stacey Kyle
Mr. Greg Larson
Ms. Sue Roth
Mr. Abel Sanchez
Mr. Bruce Van Allen
Ms. Rachel Williams

400 Encinal Street, Santa Cruz, CA 95060 • Tel (831) 466-5600 • Fax (831) 466-5607 • www.santacruzcoe.org

August 12, 2026

Michelle Stewart, Superintendent
Happy Valley Elementary School District
3125 Branciforte Drive
Santa Cruz, CA 95065

Dear Superintendent Stewart,

Thank you for submitting the public disclosure documents to our office for the Happy Valley Education Association's certificated bargaining unit of the Happy Valley Elementary School District, in accordance with Government Code 3547.5. The contract renewal is for the two-year period, July 1, 2026 – June 30, 2028 with reopeners available for 2027-28.

We have completed an analysis of your projections, discussed information with district staff and reviewed prior and current year budget data and we note the following:

1. The district has settled for a 3% increase to the salary schedule with a projected total cost for the 2026-27 fiscal year at \$22,001.
2. Two new sections under Article 16 were added:
 - a. The hourly rate for employees performing work outside of the regular work day approved by a District administrator shall be \$40 per hour.
 - b. Opportunities for extra work for employees outside of the regular work day will be offered to all unit members when appropriate. Requests for extra duties will be submitted to the administrator in writing.
3. The tentative agreement also includes clean up language in the contract around who is represented in the union, negotiation procedures, procedures for evaluations and class sizes.
4. The district provided a 3% increase to the salary schedule with the confidential and classified employees. The cost for this agreement is \$12,023.
5. The district is currently projecting to deficit spend in the unrestricted resources in the current year by \$52,060, in fiscal year 2027-28 by \$70,454, and in fiscal year 2028-29 by \$56,401. This level of deficit spending represents a 30% reduction to ending fund balance.

6. Based on the district's multi-year projections as submitted, the district has a projected unrestricted, unassigned general fund ending balance in 2026-27 of \$522,251. In 2027-28, the ending balance declines to \$451,797 and in 2028-29 the projected ending balance is \$395,396.
7. As the district is Basic Aid, the growth for increased operational revenue is limited by property tax growth. Therefore, the district is urged to consider the limited revenue growth when making additional ongoing expenditure decisions.

It appears that, based on the district's multi-year projections as submitted, the district has adequate funds to cover these additional costs through fiscal year 2028-29.

Please note that, under the provisions of AB 2756, the district is required to approve all budget revisions necessary to cover the additional costs of these agreements, or the County Superintendent will be required to issue a Qualified or Negative certification on the next interim report.

Please submit the following information to Lauren DeMasi at coe_business_help@santacruzcoe.org:

1. Signed page 10 (Second certification) within three working days of the board meeting.
2. Board meeting minutes from meeting approving the Public Disclosure within two months.
3. Escape budget revisions (if required) for the settlement are due within six weeks after the board meeting date.

If you have any questions, please feel free to contact me at 466-5602 or Rebecca Olker at 466-5630.

Thank you.

Sincerely,



Stephanic Gomez
Deputy Superintendent, Business Services

c: Dr. Faris Sabbah, County Superintendent of Schools
Rebecca Olker, Executive Director of Fiscal Services, SCCOE
Lauren Demasi, Financial Analyst, SCCOE
Cliff Hodges, Board President, HVESD
Jacob Willet, Board Clerk, HVESD
Katie Freeman, Board Member, HVESD
David Stahl, Board Member, HVESD
Michelle Yegge, Board Member, HVESD



**HAPPY VALLEY
ELEMENTARY SCHOOL**
SANTA CRUZ, CALIFORNIA

Certificated Bargaining Agreement

By and Between the

**HAPPY VALLEY
SCHOOL DISTRICT
AND
HAPPY VALLEY
EDUCATION ASSOCIATION**

July 1, 2026-June 30, 2028

Collective Bargaining Agreement
Between The
Happy Valley Elementary School District
And The
Happy Valley Education Association
2026-2028

The following provisions are agreed upon by each of the undersigned parties.
This Agreement will be in effect on a continuous basis, unless otherwise
stipulated in the Agreement, or modified in further negotiation.

Michelle Stewart, HVESD
Superintendent/Principal

Date

Angie Rossi, HVEA
Union President

Date

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Article 1 : Agreement

- 1.1 This Agreement is made and entered into by and between the Board of Education of the Happy Valley Elementary School District, which together with its administrative staff and representatives shall be referred to in this Agreement as the "District" and the Happy Valley Education Association, CTA/NEA, the certificated employees' exclusive representative, which together with its officers and representatives shall be referred to in this Agreement as the "Association".
- 1.2 This Agreement is entered into pursuant to Chapter 10.7, Sections 3540-3549 of the Government Code which shall be referred to as the "EERA".
- 1.3 Any individual contract between the District and a Bargaining Unit Member shall be subject to and consistent with the terms and conditions of this Agreement unless the District and Association have mutually agreed to an exemption from the terms and conditions of this agreement.
- 1.4 This Agreement shall remain in full force and effect from July 1, 2026 up to and including June 30, 2028, and thereafter shall continue in effect year-by-year unless one of the parties notifies the other in writing no later than March 15th of its request to modify, amend or terminate the Agreement. If the parties enter into subsequent meeting and negotiating regarding a successor agreement, the terms and conditions of this Agreement shall remain in effect until a successor agreement is reached.

Article 2 : Recognition

- 2.1. The District recognizes the Association as the exclusive representative that includes the following certificated employees:

Classroom teachers
Resource specialist

The following are excluded:

Management employees
Confidential employees
Supervisory employees
Day-to-day or short-term substitute employees
Retired, Hourly and Temporary employees

- 2.2 Disputes concerning the interpretation and application of this Article are not subject to the grievance provisions of this Agreement.
- 2.3 New certificated positions which are established during the term of this Agreement shall first be reviewed by the District and the Association as to their inclusion in the bargaining unit and shall thereafter be accredited to the unit if such positions share a community of interest with the existing unit. In the event the parties fail to agree on the inclusion or exclusion of such positions, the dispute will be referred to the Public Employment Relations Board for a decision.

Article 3: Negotiations Procedure

- 3.1 Except as otherwise provided in this Article, during the term of this Agreement the Association expressly waives and relinquishes the right to meet and negotiate and agrees that the District shall not be obliged to meet and negotiate with respect to any subject or matter that is within the scope of bargaining whether referred to or covered in this Agreement or not.
- 3.2 The parties agree to reopen negotiations on salary and two (2) other articles of each party's choice annually for the term of this agreement.
- 3.3 The parties agree that during the term of this Agreement, the parties may, by mutual agreement, meet and negotiate concerning any item within the scope of representation.
- 3.4 The parties shall commence to meet and negotiate on reopeners or a successor Agreement as soon as possible after the completion of the public notice requirements listed above. Any Agreement reached between the parties shall be reduced to writing and signed by them.
- 3.5 Within forty (40) days of ratification of the Agreement by both parties, the District and Association shall have copies of this initial contract prepared and delivered to each Bargaining Unit Member in the District plus one for use by the Association. The District shall give a copy of the Agreement to any new bargaining unit members it hires during the term of the Agreement. Both parties shall possess an electronic copy of the Agreement.
- 3.6 It is understood that the specific provisions contained in this Agreement shall prevail over District Handbook language to the extent that they are inconsistent.
- 3.7 In the event that provisions of the Handbook or other written District policy conflict with the Certificated Bargaining Agreement the Certificated Bargaining Agreement will govern. The District agrees not to make changes to the Handbook or modify or adopt new policies on subjects that are mandatory subjects of bargaining without fulfilling all bargaining obligations.

Article 4: Savings

- 4.1 Reduction or elimination of contractual provisions which are brought about by the amendment or repeal of statutory guarantees incorporated into this Agreement and which are mandatory subjects of bargaining shall obligate the parties within thirty (30) days of a demand to bargain such amendment or repeal to negotiate whether or not such amendments or repeals shall be incorporated into this Agreement.
- 4.2 If any provision of this Agreement or any application of this Agreement to any Unit Member or group of unit members is held to be contrary to law by a court of competent jurisdiction, then such provision or application shall not be deemed valid and subsisting, except to the extent permitted by law; but all other provisions or applications shall continue in full force and effect.
- 4.3 Upon mutual agreement, the parties shall commence negotiations regarding matters related to the contractual provision held contrary to law by a court of competent jurisdiction.

Article 5: Discipline and Complaint Procedures

In handling disciplinary matters, it is intended that the discipline shall be commensurate with the offense and that whenever possible, progressive steps be utilized unless the incident giving rise to the discipline is of such a nature that more severe action is appropriate as determined by the District. Progressive steps may be as follows:

5.1 Verbal Warnings

Except in those situations where an immediate suspension or more serious discipline is warranted, an employee shall be first verbally warned by the supervisor. This warning will be documented in writing and a copy will be sent to the employee. The warning shall clearly state at the top "Verbal Warning". This warning shall not initially be placed in the employee's official personnel file unless it becomes attached to more serious discipline later.

5.2 Written Warnings

Except in those situations where immediate suspension or more serious discipline is warranted, an employee shall be warned in writing by the supervisor. This warning will be documented in writing and a copy will be sent to the employee. The warning shall clearly state at the top "Written Warning". This warning shall not initially be placed in the employee's official personnel file unless it becomes attached to more serious discipline later.

5.3 Written Reprimand

Written reprimands will be documented in writing and a copy will be sent to the employee. The written reprimand shall clearly state at the top "Written Reprimand". Written reprimands will be placed in the employee's official personnel file. An employee has ten (10) days to submit a written response to the Written Reprimand which will be included with the Written Reprimand in the employee's official personnel file.

5.4. Suspension Without Pay

5.4.1 Notice of suspension will be made in certified mail upon the Unit Member by the Administrator or designee. A copy will be concurrently provided to the Association president upon request of the employee. The notice of suspension will contain:

- A statement of the specific acts or omissions upon which the discipline is based;
- A statement of the cause(s) for which the suspension is recommended;
- Where applicable, the Ed Code section, District policy, rule, regulation, or directive violated;
- Proposed penalty and the effective date; and
- Copies of any documentary evidence upon which the recommendation is based (if not previously provided to the bargaining unit member).

5.5 Dismissal

Dismissal shall be handled in accordance with the Education Code.

5.6 Grievability

This Article is intended for the purposes of suspension to replace the provisions of the Education Code. Suspensions without pay may be appealed under the Grievance Procedure in Article 6. If the Association does not demand a hearing within three (3) days, the suspension without pay may be imposed immediately by the superintendent or designee.

Article 6: Grievance Procedure

6.1 Grievance Definition

A "grievance" is a claim by one (1) or more unit members or the Association that there has been a violation, misinterpretation or misapplication of a provision of this Agreement; or of an existing District rule, policy, regulation, or law. A grievance may be filed by a Unit Member or members or by the Association making the claim.

6.2 Purpose

The purpose of this procedure is to secure, at the lowest possible administrative level, solutions to the problems that may arise, from time to time, affecting the welfare or working conditions of unit members. Both parties agree that these proceedings will be kept as informal and confidential as may be appropriate at any level of the procedure.

6.3 Procedure

A grievant may be represented at all stages of the grievance by an Association representative(s).

6.3.1 Informal Level

Prior to initiating a formal written grievance, the potential grievant shall meet with their immediate supervisor and attempt to resolve the potential grievance informally. If the informal procedure does not resolve the difficulty, the grievant may proceed to Level I.

6.3.2 Level I: Administrator

Within ten (10) days after the grievant knew or reasonably should have known of the alleged violation of the Agreement the grievant shall present a grievance in writing using the grievance form in Appendix A. The Administrator shall meet with the aggrieved party and/or designated Association representative, if any, within ten (10) days of receipt of the grievance. The Administrator shall provide a written disposition of the grievance, including the reasons therefore, within ten (10) days of such meeting. If the grievant is not satisfied with the disposition of the grievance, the grievance may be appealed to Level II.

6.3.3 Level II: Mediation

The grievant shall notify the Administrator in writing within five (5) days of receipt of the Level I decision of the decision to proceed to Level II.

- 6.3.3.1 The grievant and/or the Association, within ten (10) days, may submit the grievance to confidential non-binding mediation through the California Department of Industrial Relations, State Mediation and Conciliation Service ("SMCS").
- 6.3.3.2 An impartial mediator from SMCS shall be selected jointly by the grievant and the District within ten (10) days of the receipt of the written request. If the parties fail to agree on a mediator, the parties shall have a mediator assigned by State Mediation.
- 6.3.3.3 Mediation shall commence at the convenience of the mediator. Mediation sessions shall be confined to school days. In order to make the most efficient use of the mediator's time, mediation sessions shall extend beyond normal school hours, by mutual agreement.
- 6.3.3.4 The fees and expenses of the mediator shall be paid by SMCS.
- 6.3.3.5 If an agreement is reached, the agreement shall be reduced to writing and shall be signed by the grievant, the Association, and the District. The agreement shall be nonprecedential and shall constitute a settlement of the grievance.
- 6.3.3.6 If the Mediation process has not been successful in resolving the grievance within ten (10) days from the first meeting held by the Mediator, either party may terminate Level II and move the grievance to Level III decision by the Board.

6.3.4 Level III: Board

Within thirty (30) days of written request to move the grievance to Level III, the District shall schedule a hearing before the Board of Trustees and shall notify the grievant and Association in writing of the time and place.

6.3.4.1 The District, the grievant and/or their representative(s) shall be given an opportunity at the hearing to present witnesses and documentary evidence and to make arguments on behalf of the District or grievant.

6.3.4.2 The Board shall render a written decision within (15) days of the hearing, giving reasons for its decision. The decision of the Board shall be final.

6.3.4.3 Either party has the right to have the grievance heard in a confidential hearing.

- 6.4 No reprisals of any kind shall be taken by the District and/or the Association against anyone by reason of participation in the grievance procedure or support of any participant in the process.
- 6.5 All documents, communications and records dealing with processing of a grievance shall be filed separately from the personnel files of participants. This section does not preclude the District from filing grievance documents in the personnel file if the District determines that the nature of the grievance otherwise justifies placing documents in the personnel file.
- 6.6 The specified time limits in this procedure may be extended by mutual agreement in writing between the grievant and the District. The Association shall be notified if timelines have been extended.
- 6.7 Grievances of a similar or like nature may be joined as a single Grievance by the Association.

Article 7: Professional Rights

7.1 Academic Freedom

7.1.1 Academic freedom shall be guaranteed to teachers in the study, investigation, presentation, and interpretation of facts and ideas in so far as such facts and ideas reflect state and local prescribed courses of study.

7.1.2 Such academic freedom shall be subject to standards of professional responsibility with due regard for the maturity level of the students, laws of the State of California, and District policy and administrative rules and regulations.

7.1.3 In performing teaching functions, employees shall have reasonable freedom to express their opinions on all matters relevant to the course content, in an objective and judicious manner. An employee, however, shall not utilize their position to attempt to influence students with their own personal, political, and/or religious views. If views expressed are controversial issues, then sufficient information shall be made available on all sides of the issue so that alternatives can be discussed and evaluated on a reasonable basis. Board policies and administrative regulations regarding controversial issues shall be followed.

7.2 Personnel Files

Official personnel files will be maintained by the District for all bargaining unit employees. With advanced notice, unit members may arrange to review the contents of their personnel file in accordance with District rules. Personnel files shall be maintained in a confidential manner as required by law.

7.3 Technology

The District shall provide classroom technology equipment teachers are required to use. The District shall provide each Unit Member with a district email address. Unit members have no expectation of privacy and understand that the District may monitor or examine all system activities to ensure proper use of the system.

7.4 Lactation Accommodations

The District will provide lactation accommodations in accordance with the law.

Article 8: District Rights

- 8.1 The exercise of the powers, rights, authority, duties and responsibilities by the District, the adoption of policies, rules, regulations and practices in furtherance thereof, and the use of judgment and discretion in connection therewith, shall be limited only by the specific and express terms of this Agreement, and then only to the extent such specific and express terms are in conformance with law.
- 8.2 It is understood and agreed that the District retains all of its powers and authority to direct, manage and control to the full extent of the law. Included in, but not limited to, those duties and powers are the exclusive right to: determine its organization; direct the work of its employees; determine the times and hours of operation; determine the kinds and levels of services to be provided and the methods and means of providing them; establish its educational policies, goals and objectives; insure the rights and educational opportunities of students; determine staffing patterns; determine the kinds of personnel required; maintain the efficiency of District operations; determine the curriculum; build, move or modify facilities; establish budget procedures and determine budgetary allocations; determine the methods of raising revenue; contract out work; and take action on any matter in the event of an emergency as defined in Government Code Section 54956.5. In addition, the Board retains the right to hire, classify, assign, promote, reprimand, and terminate employees.
- 8.3 The exercise by management of the rights and discretion as described herein shall not be subject to the grievance procedure, except when the exercise of such rights conflicts with the specific terms and conditions of this Agreement.

Article 9: Association Rights

9.1 Mail Facilities

The Association shall have the right to use the District e-mail and Unit Member mailboxes including electronic mailboxes for communications to unit members. All communications from the Association shall be so identified.

9.2 Bulletin Boards

The Association shall have the right to post notices of activities and matters of Association concern on an Association bulletin board, which shall be provided in an area frequented by unit members.

9.3 Access to Worksite

Authorized representatives of the Association shall have the right to transact official Association business on school property and utilize District facilities at reasonable times and consistent with District policies and rules provided that such activities or use do not interrupt the educational program.

9.4 Representation

The Association has the right under the Educational Employment Relations Act (EERA) to represent unit members in their employment relations with the District. Nothing in this Agreement shall be construed as a waiver of such rights.

9.5 Release Time

9.5.1 Bargaining Team members shall be provided district-paid negotiations at no loss of salary or other benefits in accordance with the EERA. Additionally, up to two bargaining team members shall have one (1) day each of district-paid release time to prepare for negotiations, upon reasonable advance notice and with securing substitute teacher coverage.

9.5.2 Grievants and Association representatives shall be provided district-paid release time for grievance processing meetings held by the District at no loss of salary or other benefits.

9.5.3 Each year, upon reasonable advance notice and with securing substitute teacher coverage, a total of up to two (2) days of district-paid release time shall be afforded to HVEA to select a Unit Member or unit members to attend union trainings, conferences, and/or meetings at no loss of salary or other benefits.

9.6 Access to Information

9.6.1 The District, upon request by the Association, shall provide the Association, within ten (10) days, or as soon as is practical, all requested information concerning the financial resources and staffing of the District. In addition, the District, upon request and consistent with the law, agrees to provide any other information the Association deems necessary to fulfill its role as exclusive representative.

9.6.2 Upon request from the Association, the District shall make available each semester, a list of all bargaining unit members, their work assignment and work email address.

9.6.3 The District shall provide the Association the name and contact information for each new hire in the bargaining unit within ten days of their hire. If the District provides an orientation or training for new hires in the bargaining unit, the District shall notify the Association and provide the Association with at least fifteen (15) minutes to introduce and discuss the role of the union and to provide membership information.

9.7 Dues Deduction

9.7.1 Any Bargaining Unit Member may join the Association and authorize dues deduction from his or her paycheck. The Association will provide to the District copies of member forms authorizing deduction of exclusive representative's membership dues. Such authorization shall continue in effect from year to year under this Agreement unless the Association provides notice of revocation. Pursuant to such authorization, the employer shall deduct one-tenth (1/10) of such dues from the

regular salary check of the member of the Association each month for ten (10) months. Deductions for members of the Association who authorize dues deduction after the commencement of the school year shall be appropriately prorated.

9.7.2 As per California Teachers Association membership procedure Association members shall provide notice of intent to drop membership in writing to the local Association President. The Association President shall notify the District of any union members dropping HVEA/CTA/NEA Membership.

9.7.3 The Association agrees to defend and indemnify the District for any unit member's allegations, claims, actions, suits, settlements, or judgements which arise out of payroll deductions made by the District in reliance on information and notification provided to the District by the Association. In defending and indemnifying the District, the Association shall have the right to select legal counsel at its sole option and expense, to control litigation strategies and decisions, and to determine whether any action or proceeding referred to above shall or shall not be compromised, resisted, defended, tried, or appealed.

Article 10: Reassignments

- 10.1 Unit Members may be reassigned at the discretion of the District.
- 10.2 A Unit Member may request reassignment when there is a vacancy.
- 10.3 A Unit Member whose request is denied shall be granted a meeting with the Administrator to discuss reasons for the denial.
- 10.4 Unit members who are involuntarily reassigned during the school year and forced to move classrooms shall be allowed two paid days of release time for preparation and moving prior to the effective date of the reassignment.
- 10.5 A Unit Member may request to be notified of any vacancies by email during the summer and shall submit the request to the Superintendent in writing prior to the start of the summer break.

Article 11: Procedures for Evaluation

11.1 The purpose of the evaluation is:

- 11.1.1 To assist the teacher in maximizing professional and intellectual growth.**
- 11.1.2 To assist the supervisor in maximizing his/her knowledge toward the advancement of the educational program.**

11.2 Evaluation Model

- 11.21 All employees, including staff not on cycle to be evaluated, will write annual goals to be discussed with the supervisor no later than October 1. The goals conference will address one standard and related goal selected by the unit member, and one standard and related goal selected in collaboration with administration and unit members.**
- 11.2.2 All Probationary and/or Temporary teachers shall be evaluated annually. At the end of two years, the District will either non-reelect the probationary or temporary teacher or grant probationary status.**
- 11.2.3 If Probationary status has been granted, then Probationary teachers shall be evaluated at least every two years. Probationary teachers who do not receive satisfactory evaluations for two (2) consecutive evaluations shall return to the annual evaluation cycle. If a Unit Member is scheduled to be evaluated during a particular school year but is granted a leave of absence for one (1) semester or longer, such evaluation shall take place during the first year of return to duty.**
 - 11.2.3.1 An exception to the bi-annual evaluation can be made, on a yearly basis, if the Unit Member and evaluator mutually agree to a suspension of the evaluation, up to five years, providing that the following criteria are met by the certificated unit member:**
 - Has been granted probationary status**
 - Employed by the District for at least 10 years**

- Previous evaluations show that the employee is “Proficient” or “Outstanding” on all noted teaching standards

11.3 Observation Timeline

11.3.1 The Unit Member and the site supervisor will establish the time, number, and length of the observations.

11.3.2 Pre-observation conference: A pre-observation conference will be held at least 48 hours in advance of the scheduled observation. Unit members will submit the pre-observation form at or before the pre-observation conference.

11.3.2 Formal observations:

11.3.2.1 Temporary/Probationary Teachers: The midyear evaluation shall be completed no later than February 1st of each year.

11.3.2.2 Final evaluation for all employees: The final evaluation, including the summative page, shall be completed within thirty (30) days from the end of school.

11.4 Right to respond: The employee has ten days to write a response to the evaluation. The written response will be attached to the report.

Article 12: Work Day/Work Year

- 12.1 For TK-3 teachers, the workday shall be 8:00 a.m. to 2:55 p.m, including a thirty-minute duty free lunch. For 4-6 grade teachers, the workday shall be 8:00 a.m. to 3:25 p.m., including a thirty-minute duty-free lunch. On restructured days, the teachers may end the workday at 2:55. The length of the school day may be modified by mutual agreement of the Site Certificated Faculty and Site Administrator.
- 12.2 In addition to the school day defined in 12.1 above, the contracted workday shall include staff meetings scheduled each month not to exceed four hours per month. The District additionally has the authority to call mandatory emergency meetings as needed. Participation in committees shall rotate among Employees, such as Site Council, Board meetings, and Parent Club, to ensure fairness.
- 12.3 Bargaining unit employees are required to attend Back-to-School Night and Open House.
- 12.4 The Administrator will assign additional instructional duties to the Transitional Kindergarten and/or Kindergarten teacher beyond the Transitional Kindergarten and/or Kindergarten instructional day if the Transitional Kindergarten and/or Kindergarten teacher's instructional day is shorter than the primary instructional day.
- 12.5 The Superintendent shall consult with unit members regarding scheduling professional development, teacher workdays and events for the following year's calendar.
- 12.6 The teacher work year shall be 185 days per year. Unit members shall provide instruction for 180 days per year. Unit members shall render service for three days prior to the first day of student instruction. There shall also be two (2) professional development days. Teachers can check out after school on the last student day or one day of the following week based on mutual agreement of the administration and teacher.

- 12.7 Preparation Time: The District shall ensure that each general education and resource teacher receives an average of ninety (90) minutes per week of uninterrupted preparation time, prorated for less than 1.0 FTE. Preparation Time will be provided with the exception of the first week of the school year. Preparation time will not be provided on restructured days, Parent/Teacher conference days, or non-instructional days. If preparation time built into the instructional day cannot be afforded due to loss of funding or personnel, this preparation time will not be provided.
- 12.8 IEP, SST, 504 Meetings Outside Contract Hours: Unit members are expected to attend IEP, SST, and 504 meetings. When these meetings occur in excess of four hours per year outside of contracted hours, unit members shall be paid at the hourly rate, prorated on the quarter hour. Unit members are required to keep track of their own time and submit hours for payment during the month the hours are worked.
- 12.8.1 The Resource Specialist is expected to conduct IEP meetings as part of the position, and shall not receive additional compensation for this job duty.

Article 13: Safety

- 13.1 It is the responsibility of all employees to observe safety rules and regulations. All employees are expected to exercise habits of safety in the performance of their duties and encourage habits of safety in others. The District shall take reasonable steps to ensure safe working conditions for all unit members including taking reasonable steps to correct conditions determined by the District to be unsafe.
- 13.2 Unit members who witness an accident or injury on District property or on a field trip, or during any District sponsored event, must report it as soon as possible.
- 13.3 Employees shall report promptly to the Administrator or main office personnel any unsafe condition, incident, or practice in which in their opinion is unsafe and warrants investigations. The District shall investigate such matters as promptly as possible. If the administration finds that remedial action is necessary, it shall be carried out with reasonable promptness. If the matter is considered emergency in nature, the employee shall immediately report the condition to the Administrator or main office personnel.
- 13.4 At least once a year the Administrator will provide appropriate safety information to unit members and discuss safety procedures affecting unit members (e.g. campus evacuation or lockdown procedures).

Article 14: Leaves

14.1 Sick Leave

14.1.1 Ten (10) days of sick leave credit are provided annually for employees working full-time for a full contract year. This leave is prorated if the Unit Member works less than full-time or less than a full year.

14.1.2 Earned sick leave may be accumulated from year-to-year. Earned sick leave may be transferred to or from other California school districts in accordance with the law.

14.1.3 When all sick leave credit has been exhausted, an employee absent for illness receives the difference between their pay and the substitute rate for a period of five (5) months.

14.2 Personal Necessity Leave

14.2.1 Certificated personnel may use a maximum often of their accrued sick leave days during each contract year for personal necessity pursuant to Education Code 44981.

14.2.2 Acceptable reasons for the use of personal necessity leave days as prescribed by District Regulation and Education Code include:

14.2.2.1 Death of a member of the immediate family when the number of days of absence exceeds the limits set by bereavement leave provisions.

14.2.2.2 An accident involving the employee's person or property or the person or property of a member of the immediate family.

14.2.2.3 A serious illness of a member of the employee's immediate family.

14.2.2.4 Required court appearance.

14.2.2.5 Fire, flood, or other immediate danger to the home of the employee.

14.2.2.6 Personal legal business of a serious nature, which the employee cannot disregard.

14.2.2.7 One day per month (up to five days each year) to participate in a child's school activity.

14.2.3 Items in 14.2.2.1 and 14.2.2.2 do not need advanced permission.

Leave for personal necessity may be allowed for other reasons at the discretion of the superintendent.

14.2.4 Personal Necessity Business Leave

A subset of up to two (2) Personal Necessity day allotment per school year may be used for Personal Business leave and may be used at the unit members' discretion, with the exception of extensions of holidays or break periods. However, Personal Business that must be conducted adjacent to a holiday or break period may be authorized by the Superintendent. Unit members shall be required to obtain substitute coverage for approval of this leave. Unit members shall not be required to give verification or explain the reason for the leave. Personal Business Leave shall be deducted from the unit member's accrued sick leave.

14.2.5 Yearly, District auditors randomly review employee attendance records to see if an individual's pattern of attendance is in violation of the reasons for the use of personal necessity leave as established by code and District regulation. Auditors and State regulators feel misuse of this Education Code constitutes a "gift of public funds" for other than the intended use.

14.3 Bereavement Leave

14.3.1 A Unit Member shall be entitled to a maximum of three (3) days leave of absence without loss of salary for the death of any member of their immediate family. If out-of-state travel or travel in excess of 300 miles one way is required, a unit member shall be entitled to a maximum of two (2) days additional paid Bereavement Leave. Bereavement leave shall not be accumulative and shall not be charged against any other leave.

14.3.2 For the purposes of Bereavement Leave member of the "immediate family" is defined as the mother, father, grandmother, grandfather, or a grandchild of the unit member or of the spouse or registered domestic partner of the unit member, and the spouse, registered domestic partner, son, son-in-law, daughter, daughter-in-law, brother, sister, stepmother, mother-in-law, brother-in-law, sister-in-law, stepfather, father-in-law, stepson, stepdaughter, legal guardian, or foster children of the unit member, or a long-term resident of the household of the unit member. An employee may access bereavement leave due to a stillbirth. Additionally, an employee may access bereavement leave due to miscarriage, as defined by the Centers For Disease Control and Prevention, when the loss is verified by a physician's note.

14.4 Leaves contained in the Faculty Handbook are subject to the Grievance Procedure of this Agreement.

Article 15: Health and Welfare Benefits

15.1 The District shall provide eligible full-time unit members a health and welfare allowance as listed below to be used for health, dental and vision insurance for each Unit Member and their eligible dependents. Any cost over the allowance shall be borne by unit members through automatic payroll deduction.

15.1.1 Effective October 1, 2024, the total District health and welfare contribution towards medical premiums per school/fiscal year shall be up to \$1600 per month for medical for full family coverage, including coverage for employee plus one for dental and vision.

15.1.2 Unit members eligible for health and welfare benefits coverage are those working 50% or greater. Unit members working 50% or greater shall receive the same percentage of the health and welfare allowance as their work compares to full time. For example, an employee who is 50% F.T.E. will receive 50% of the health and welfare allowance toward benefits.

5.1.3 Unit members working less than 90% offFTE can opt out of coverage in accordance with the rules of the JPA, the carrier and the law.

15.1.4 Retirees and eligible dependents shall have the option to continue to receive District insurance coverage as permitted by the carrier and upon reimbursement for the full monthly premium to the District.

15.2 Duration of Benefits

Unit members who work a complete school year shall have fringe benefits under the District's fringe benefit program effective through the last day of July. Unit members beginning a new school year shall have fringe benefits effective on the first day of September. Unit members who are employed subsequent to the first day of the school year shall have their fringe benefits effective from the first day of the month following the hire date of the employee. Effective dates may be modified as required by the JPA, the carrier and/or the law.

Article 16: Salaries

16.1 Salary Increases shall be provided as follows:

16.1.1 Effective July 1, 2026, the 2026-2027 certificated salary schedule shall be increased by 3%.

16.1.2 Year 2: The parties agree to a re-opener on salary in year two of this Agreement.

16.2 The salary schedule shall be based on 185 day salary/workdays. 180 school days, two (2) staff development days, and three (3) teacher work days paid by the District. The salary schedule shall be attached to this agreement as Appendix B.

16.2.1 Unit members who serve other than the required number of workdays set forth in this Agreement shall receive a salary which is not less than that which bears the same ratio to the established annual salary as determined by their salary position as the number of days they serve bears to the number of FTE working days required by this Agreement. Notwithstanding the above, unit members who serve for one (1) full semester shall receive not less than one-half (1/2) the annual salary applicable to their class and step.

16.2.2 Unit members covered by the salary schedule attached as Appendix B include the following job classifications:

16.2.2.1 Classroom teacher

16.2.2.2 Resource Specialist

16.2.3 The annual salaries set forth in this Agreement shall be paid in ten (10) or twelve (12) equal installments, payable on the last day of each month with appropriate deductions. The provisions of this paragraph shall be subject to the requirements and procedures of the Santa Cruz County Office of Education.

- 16.2.4 Mandatory deductions from gross earnings are those required by law, provisions of this Agreement, and include but are not limited to Federal and State Income Tax and State Teachers Retirement System contributions.
- 16.2.5 Optional deductions are those deductions the Unit Member may legally elect to have taken from their gross earnings. Optional deductions must be initiated or ended in writing by the unit member. Such authorizations shall remain in effect continuously until the District receives from the Unit Member a written notice withdrawing the authorization for a particular deduction.
- 16.2.6 The hourly rate for employees performing other work outside of the regular work day approved by the Administrator shall be \$40 per hour.
- 16.2.7 Opportunities for extra work for employees outside of the regular work day will be offered to all unit members when appropriate. Requests for extra duties will be submitted to the Administrator in writing.
- 16.3 Credit for service outside the District shall be allowed on the salary schedule at the rate of one (1) increment (step) for one (1) year of service up to a maximum of fifteen (15) increments.
- 16.3.1 Unit members whose initial District employment was in a certificated position in programs conducted under contract with public or private educational institutions or other categorically funded projects and who were then subsequently employed as probationary unit members with no break in service shall be credited with the time served in the specifically funded program for salary schedule placement and advancement purposes, consistent with 16.5 below.
- 16.4 All unit members shall advance one (1) vertical step on the salary schedule for each year of service, except those whose placement is at the maximum step for their class. For purposes of this section, a year of service shall be defined as working at least fifty percent of the days school is in session. A year of

service shall be earned for part-time employees who work at least fifty percent of their contracted days for each full school year. Salary schedule advancement shall take place at the commencement of the school year.

16.4.1 Unit members who have been employed in the regular educational program of the District as probationary or permanent employees before being assigned to programs conducted under contract with public or private educational institutions or other categorically funded projects shall be entitled to continue vertical advancement on the salary schedule for each year of service while assigned to such restricted programs.

16.4.2 Course credit for salary placement and movement shall be given for post-graduate, upper division or graduate course work taken at four year colleges, universities or graduate schools which are accredited by a regional accrediting commission or other programs approved by the District. Prior approval by the Administrator is required for all course work and/or other programs for which the Unit Member wishes to obtain salary schedule credit.

16.4.3 Semester hours (units) as defined by the particular accredited college or university will be acceptable for placement on the salary schedule. Quarter hours (units) shall be converted to semester hours (units) by multiplying the total of such hours (units) by two-thirds ($2/3$).

16.4.4 Unit members requesting reclassification from one class (column) to another must file such requests with the Administrator no later than May 1 of each year. If the District is not notified by May 1, no change in classification shall occur within the next school year. Supporting records or transcripts verifying post-graduate units of study that are to apply toward such a reclassification must be filed with the Administrator no

later than August 1 of the ensuing year.

- 16.5 Unit members who carry out an assignment for a District approved overnight student field trip shall be compensated either by a stipend of the daily sub rate per night or may take one additional personal business day during the school year, not deducted from the unit member's salary. This day must be used in the school year in which it is earned, does not carry over into the next school year, and may not be cashed out.
- 16.6 Unit members possessing a Master's Degree shall receive annual compensation in the amount of \$1,500 in addition to their regular salary.
- 16.7 Teachers who teach a combination class shall receive an annual stipend of \$1500. Teachers who teach an extended day of 1,560 instructional minutes per year (120 additional instructional minutes per week) shall receive a stipend of \$1500 per year.
- 16.8 Unit members shall receive annual compensation based on their longevity and anniversary for service in-District in the following amounts (reflected on salary schedule):
 - After year 15: \$1,500
 - After year 20: \$2,000
 - After year 25: \$2,500

Article 17: Class Size

Class size will be determined by the District to reflect the best interest of the students and to meet the needs of the District's programs.

- 17.1 TK-3rd grade classes shall have a class size of 24 or fewer students within ten (10) school days from the first day of school of each academic year.
- 17.2 4th-6th grade classes shall have a class size of 28 or fewer students of each academic year at all times.

Appendix A:

Grievance Form Happy Valley Elementary School District

Name of Grievant: _____ Date Filed: _____

Date Cause of Grievance Occurred: _____

INFORMAL CONFERENCE HELD

Date Held: _____

Persons Present:

Level I: Administrator

Specific provision of Agreement alleged to have been violated:

Circumstances involved:

Specific remedy sought:

Signed by Grievant and/or HVEA: _____ Date: _____

Disposition of immediate supervisor:

Signed by immediate supervisor _____ Date: _____

Position of Grievant:

Signed by Grievant and/or HVEA: _____ Date: _____

Level II: Meditation

Date received by Administrator: _____

Disposition of Administrator or designee:

Signed by Administrator or designee: _____ Date: _____

Position of Grievant and/or Association:

Signed by Grievant and/or HVEA: _____ Date: _____

Appendix B: Salary Schedule

Happy Valley Elementary School District
Certificated TE Salary Schedule

2026-2027

COLUMN:	I	II	III	IV	V	VI
STEP	BA	BA+15	BA+30	BA+45	BA+60	BA+75
1	50,901	53,447	56,117	58,924	61,871	64,963
2	52,682	55,317	58,083	60,986	64,036	67,237
3	54,526	57,253	60,116	63,121	66,277	69,591
4	56,435	59,257	62,219	65,331	68,597	72,027
5	58,409	61,331	64,398	67,617	70,998	74,548
6	60,455	63,477	66,651	69,984	73,482	77,157
7	62,570	65,700	68,984	72,433	76,054	79,858
8		67,999	71,398	74,969	78,717	82,653
9		70,379	73,897	77,592	81,472	85,545
10		72,842	76,484	80,308	84,324	88,539
11			79,161	83,119	87,275	91,638
12				86,028	90,329	94,845
13					93,491	98,165
14						98,165
15						98,165
16						101,601
17						101,601
18						101,601
19						105,157
20						105,157
21						105,157
22						108,837
23						108,837
24						108,837
25						112,647
Masters	\$1,500	Stipend	185 day calendar (180 school days, 5 work days)			
In-District	\$1,500	after year 15	\$40 per hour extra duty pay			
Anniversary	\$2,000	after year 20				
Increments	\$2,500	after year 25				

Happy Valley Elementary School District
Classified CLCONF - Administrative Assistant, Confidential
Effective 7/1/26

Category		I
STEP		
1	\$	30.46
2	\$	33.17
3	\$	35.87
4	\$	38.55
5	\$	41.22
6	\$	43.91
7	\$	46.61
8	\$	46.61
9	\$	46.61
10	\$	49.58
11	\$	49.58
12	\$	49.58
13	\$	52.66
14	\$	52.66
15	\$	52.66
16	\$	55.77
17	\$	55.77
18	\$	55.77
19	\$	56.89
20	\$	56.89
21	\$	56.89
22	\$	58.02
23	\$	58.02
24	\$	58.02
25	\$	59.17

Longevity of 5% after 5 years, 7.5% after 7 years and 10% after 10 years

Happy Valley Elementary School District
Classified CLADASST - Administrative Assistant I
Effective 7/1/26

Category		I
STEP		
1	\$	24.60
2	\$	26.42
3	\$	28.69
4	\$	30.97
5	\$	33.21
6	\$	35.50
7	\$	37.75
8	\$	37.75
9	\$	37.75
10	\$	40.27
11	\$	40.27
12	\$	40.27
13	\$	41.10
14	\$	41.10
15	\$	41.10
16	\$	41.90
17	\$	41.90
18	\$	41.90
19	\$	42.75
20	\$	42.75

Longevity of 5% after 5 years, 7.5% after 7 years and 10% after 10 years

Happy Valley Certificated CE Speech
Effective 7-1-2026

2026-2027 CE Speech

Step	
1	\$61.41
2	\$67.41
3	\$68.29
4	\$71.44
5	\$72.87
6	\$75.35
7	\$76.85
8	\$78.36

2026-27 45-Day Revision Multi-Year Projection

	2025-26			2026-27			2027-28			2028-29		
	Estimated Actuals			Adopted Budget			Future Year One			Future Year Two		
	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total
8000-8099 - LCFF/Property Tax	1,443,375	-	1,443,375	1,483,492	-	1,483,492	1,524,012	-	1,524,012	1,566,411	-	1,566,411
8100-8299 - Federal	1,261	67,012	68,274	-	52,667	52,667	-	52,667	52,667	-	52,667	52,667
8300-8599 - State	34,018	288,316	322,334	32,862	341,737	374,598	31,746	229,253	260,998	30,747	227,205	257,952
8600-8799 - Local	177,678	179,255	356,933	74,478	162,356	236,834	74,478	130,148	204,626	74,478	130,148	204,626
TOTAL REVENUE	1,656,332	534,583	2,190,915	1,590,832	556,760	2,147,591	1,630,236	412,068	2,042,304	1,671,636	410,020	2,081,656
1000-Certificated Salaries	720,939	114,043	834,982	719,488	177,766	897,254	773,453	126,284	899,737	784,716	127,543	912,260
2000-Classified Salaries	208,431	39,062	247,492	210,035	41,951	251,986	223,404	29,566	252,969	224,720	28,249	252,969
3000-Benefits	366,866	113,388	480,254	382,278	128,836	511,114	390,200	122,196	512,396	391,336	122,288	513,625
4000-Books & Supplies	9,582	19,420	29,002	10,029	78,710	88,739	10,530	14,146	24,676	11,057	14,853	25,910
5000-Service&Operating	238,660	288,275	526,936	191,338	259,367	450,705	205,525	205,989	411,514	216,239	215,812	432,051
6000-Capital Outlay	225,977	65,572	291,549	-	-	-	-	-	-	-	-	-
7100-7200-Other out go	-	62,552	62,552	-	2,550	2,550	-	2,550	2,550	-	2,550	2,550
7300-Indirects	(6,880)	6,880	-	(8,696)	8,696	-	(8,696)	8,696	-	(8,696)	8,696	-
7400-Debt Service	67,155	-	67,155	35,078	-	35,078	35,078	-	35,078	35,078	-	35,078
TOTAL EXPENDITURES	1,830,729	709,191	2,539,920	1,539,550	697,876	2,237,426.02	1,629,494	509,425	2,138,919.73	1,654,451	519,991	2,174,442.58
OTHER SOURCES:												
8972 LEASES PAYABLE	176,150	-	176,150									
89XX TRANS IN	53,631	-	53,631	63,562	-	63,562	76,931	-	76,931	76,931	-	76,931
76XX TRANS OUT	-	-	-	-	-	-	-	-	-	-	-	-
CONTR. REST. TO REST. #8990	-	-	-	-	-	-	-	-	-	-	-	-
CONTR UNRES TO UNRES #8980	-	-	-	-	-	-	-	-	-	-	-	-
CONTR. UNRES TO RESTR. #8980	(150,592)	150,592	-	(69,060)	69,060	(0)	(79,337.03)	79,337.03	-	(88,476.16)	88,476.16	-
TOTAL OTHER	(96,961)	150,592	53,631	(5,497)	69,060	63,562	(2,406)	79,337	76,931	(11,545)	88,476	76,931
NET INCR/DECR TO FUND BALANCE	(95,208)	(24,016)	(119,224)	45,785	(72,057)	(26,272)	(1,665)	(18,020)	(19,685)	5,639	(21,495)	(15,856)
ACTUAL BEG. FUND BALANCE	660,475	214,389	874,864	565,267	190,372	755,640	611,052	118,316	729,367	609,387	100,295	709,682
END FUND BALANCE	565,267	190,372	755,640	611,052	118,316	729,367	609,387	100,295	709,682	615,027	78,800	693,827

(REU):

126,996

111,871

106,946

108,722

Happy Valley Elementary School District

2026-27 45-Day Budget Revision

Meeting Date: August 12, 2026

BACKGROUND: California Education Code Section 42127(i)(4) specifies that school districts shall make available for public review any budget revisions made to revenue and expenditures within 45 days after the Governor signs the annual State Budget Act. In practice, Districts bring a formal revision to the board when the Enacted Budget alters revenue or expenditure projections in a material manner and impact the ending fund balance.

The 45-Day Revision for the 2026-27 fiscal year includes the following changes:

- A second round of funding for the Student Support & Professional Development Discretionary Block Grant has been included in the State Enacted Budget. Estimated allocations for each LEA is \$937 per ADA, projected to be \$98,712 for Happy Valley School.
- The Special Education base rate has been increased from \$999 per ADA to \$1,340 per ADA. This represents an additional \$35,308 in Special Education revenue projected for Happy Valley School. The additional revenue will also reduce the contribution from the Unrestricted General Fund that is required to meet the financial obligations of the program.
- In June, negotiations were settled with the Certificated bargaining unit for a 3% on-schedule increase to the salary schedule. While not yet approved by the school board, this increase has been included in the budget revision to understand the fiscal impact.
- Beginning January 1, 2027, school districts must provide employees with up to 14 weeks of full paid leave for pregnancy-related conditions. The State included an LCFF Augmentation of 1.44% to fund this mandate. Since Happy Valley Elementary School District is community funded, or Basic Aid, this is an unfunded mandate for the district.

Additional changes will occur as the 2025-26 fiscal year is closed out and updated information is received pertaining to the 2026-27 fiscal year. Happy Valley will provide additional information with the Unaudited Actuals report presented at the September 2026 board meeting.

Happy Valley Elementary School District InterDistrict Transfers (IDTs)

FOR NEW STUDENTS REQUESTING IDTS TO HVESD

Because of our Basic Aid status and small size, Happy Valley Elementary School District rarely accepts new Interdistrict Transfers (IDTs). Please call the school office if you have questions.

FOR RETURNING STUDENTS REQUESTING IDTS TO HVESD

The window for submitting applications for returning IDTs is February 1-March 1.

As early as February 1 of each year, parents may submit an IDT renewal request. Parents/guardians must first start in the district where their student resides. The IDT Request Form should be given to the student's home district who will forward the approved applications to Happy Valley Elementary School District.

When Happy Valley ESD receives an IDT request, the following is taken into consideration:

- Available space in requested grade level/program. (*See notes regarding capacity.*)
- Student's attendance, behavior, and academic performance records from the previous year.

Parents/guardians will be notified as to the status of their transfer application by email or mail.

****Please note:** When capacity limits have been reached, the District may hold application approvals until August.

INTERDISTRICT TRANSFER DENIAL/REVOCATION

An interdistrict attendance permit may be denied or revoked by the Superintendent or designee for any of the following reasons:

1. Capacity limits have been reached at a particular grade level, school or program.
2. The attendance of the student would increase the district's class size above the maximums established by the State of California or above the maximums set in a negotiated teacher contract and place the district at risk of violating such standards.
3. The district does not have an appropriate educational program to meet the student's needs.

4. Unsatisfactory academic performance.
5. Unsatisfactory attendance.
6. Unsatisfactory behavior.
7. Providing incomplete, false or misleading information on the application. Furthermore, failure of a parent/guardian to meet any timelines established by the district shall be deemed an abandonment of the request.
8. Repeated disruptive or otherwise unsatisfactory conduct in violation of Education Code sections 48900 et seq.
9. Suspension from the district as authorized by Education Code sections 48900 et seq.
10. Recommendation for expulsion or expulsion from the district as authorized by Education Code sections 48900 et seq.
11. Any other lawful, non-arbitrary basis for the district to conclude it would be in the best interest of the student, the student's school, or the district for the interdistrict attendance permit to be revoked.

TIMELINES FOR INTERDISTRICT TRANSFER REQUESTS

- For an interdistrict transfer request received by the district 15 or fewer calendar days before the commencement of instruction in the school year for which the transfer is sought, the district will notify the parent/guardian of its final decision within 30 calendar days from the date the request was received.
- For an interdistrict transfer request received by the district more than 15 days before the commencement of instruction in the school year for which the interdistrict transfer is sought, the district will notify the parent/guardian of its final decision as soon as possible, but no later than 14 calendar days after the commencement of instruction for the school year for which transfer is sought.

CAPACITY LIMITS

Capacity limits are intended to allow space for **NEW** resident growth. These capacity limits are intended to allow space for district residents who enroll during the summer, or who enroll in the program(s) during the school year. Capacity limits here are set for interdistrict transfer purposes only.

1. Capacity is based on the actual enrollment figures of current residents and continuing students for the requested transfer year, or the anticipated enrollment figures available as of February 1 (or the date of the application, whichever is later).
2. Capacity may be based on relevant grade level, program, classroom, staffing, or the school's total enrollment.
3. As the district establishes new or different classes or programs for which a capacity limit is not included herein, it may establish appropriate capacity for any such class or program.

APPEAL PROCESS

If an IDT Application is denied by the Superintendent or designee, the parents/guardians of the student may appeal to the HVESD School Board within 30 days of the notification of the IDT denial. The hearing will be held at a regularly scheduled board meeting. If the denial is upheld, the parents/guardians may appeal to the County Board of Education within 30 days of the HVESD School Board Meeting. Students who are under consideration for expulsion or who have been expelled may not appeal interdistrict attendance denials or decisions while expulsion proceedings are pending, or during the term of the expulsion. (Education Code 46601)

BP 5117

AR 5117

InterDistrict Transfer Form

Regulation 5117: Interdistrict Attendance

Status: ADOPTED

Original Adopted Date: 02/12/2020 | **Last Revised Date:** 06/14/2023 | **Last Reviewed Date:** 06/14/2023

Interdistrict Attendance Agreements and Permits

In accordance with an agreement between the Board of Trustees and the board of another district, a permit authorizing a student of either district to enroll in the other district may be issued upon approval of both districts.

The district shall post on its website the procedures and timelines for requesting an interdistrict transfer permit, including a link to BP 5 117 - Interdistrict Attendance. The posted information shall include, but is not limited to: (Education Code 46600.1, 46600.2)

1. The date upon which the district will begin accepting and processing interdistrict transfer requests for the following school year
2. The reasons for which the district may approve or deny a request, and any information or documents that must be submitted as supporting evidence
3. If applicable, the process and timelines by which a denial of a request may be appealed within the district before the district renders a final decision
4. A statement that failure of a parent/guardian to meet any timelines established by the district shall be deemed an abandonment of the request
5. Applicable timelines for processing a request, including the following statements: (Ed Code 46600.2)
 - a. For an interdistrict transfer request received by the district 15 or fewer calendar days before the commencement of instruction in the school year for which the transfer is sought, the district will notify the parent/guardian of its final decision within 30 calendar days from the date the request was received.
 - b. For an interdistrict transfer request received by the district more than 15 days before the commencement of instruction in the school year for which the interdistrict transfer is sought, the district will notify the parent/guardian of its final decision as soon as possible, but no later than 14 calendar days after the commencement of instruction in the school year for which transfer is sought.
6. The conditions under which an existing interdistrict transfer permit may be revoked or rescinded

Priority for interdistrict attendance shall be given to a student who has been determined, through an investigation by either the district of residence or district of proposed enrollment, to be a victim

of an act of bullying, as defined in Education Code 48900(r), committed by a student of the district of residence. (Education Code 46600)

Until the district is at maximum capacity, the district shall accept any student whose interdistrict transfer application is based on being the victim of an act of bullying or a child of an active duty military parent/guardian. The district shall ensure that such students are admitted through an unbiased process that prohibits an inquiry into or evaluation or consideration of whether or not a student should be enrolled based on academic or athletic performance, physical condition, proficiency in English, family income, or any of the individual characteristics set forth in Education Code 220, including, but not limited to, race or ethnicity, gender, gender identity, gender expression, and immigration status. (Education Code 46600)

In addition, the Superintendent/Principal or designee may approve an interdistrict attendance permit for a student for any of the following reasons when stipulated in the agreement:

1. To meet the child care needs of the student, only as long as the student's child care provider remains within district boundaries
2. To meet the student's special mental or physical health needs as certified by a physician, school psychologist, or other appropriate school personnel
3. When the student has a sibling attending school in the receiving district, to avoid splitting the family's attendance
4. To allow the student to complete a school year when the student's parents/guardians have moved out of the district during that year
5. To allow the student to remain with a class graduating that year from an elementary, middle, or senior high school
6. To allow a high school senior to attend the same school attended as a junior, even if the student's family moved out of the district during the junior year
7. When the parent/guardian provides written evidence that the family will be moving into the district in the immediate future and would like the student to start the school year in the district
8. When the student will be living out of the district for one year or less
9. When recommended by the school attendance review board or by county child welfare, probation, or social service agency staff in documented cases of serious home or community problems which make it inadvisable for the student to attend the school of residence
10. When there is valid interest in a particular educational program not offered in the district of residence
11. To provide a change in school environment for reasons of personal and social adjustment
12. When the student is the child (or step-child) or grandchild of a full-time District employee

The Superintendent/Principal or designee may deny initial requests for interdistrict attendance permits due to limited district resources, overcrowding of school facilities at the relevant grade level, or other considerations that are not arbitrary. However, once a student is admitted, the district shall not deny continued attendance because of overcrowded facilities at the relevant grade level.

If a student's interdistrict transfer request is denied, the Superintendent/Principal or designee shall, in writing, notify the parents/guardians of their right to appeal to the County Board of Education within 30 calendar days from the date of the final denial. (Education Code 46600.2)

All notices to parents/guardians regarding the district's decision on any request for interdistrict transfer shall conform to the translation requirements of Education Code 48985, and may be provided by regular mail, electronic format if the parent/guardian provides an email address, or by any other method normally used to communicate with parents/guardians in writing. (Education Code 46600.2)

Pending a decision by the two districts or by the County Board on appeal, the Superintendent/Principal or designee may provisionally admit a student who resides in another district for a period not to exceed two school months, provided the district is the district of proposed enrollment. If the decision has not been rendered by the conclusion of two school months and the districts or County Board is still operating within the prescribed timelines, the student shall not be allowed to continue attending the district school to which the student was provisionally admitted. (Education Code 46603)

Students who are under consideration for expulsion or who have been expelled may not appeal interdistrict attendance denials or rescissions while expulsion proceedings are pending or during the term of the expulsion. (Education Code 46601)

Once a student is admitted to a school on the basis of an interdistrict attendance permit, the student shall not be required to reapply for an interdistrict transfer and shall be allowed to continue to attend the school of enrollment, unless reapplication standards are otherwise specified in the interdistrict attendance agreement. Existing interdistrict attendance permits shall not be rescinded after June 30 following a student's completion of grade 10 or for any student entering grade 11 or 12 in the subsequent school year. (Education Code 46600)

Transfers Out of the District

A student whose parent/guardian is in active military duty shall not be prohibited from transferring out of the district, provided the school district of proposed enrollment approves the application for transfer. (Education Code 46600, 48307)

If the district is unable to provide an intradistrict transfer to a student who is a victim of an act of bullying, as defined in Education Code 46600, the district shall not prohibit the student from transferring out of the district if the district of proposed enrollment approves the application for transfer. (Education Code 46600)

The district may limit transfers out of the district to a school district of choice under any of the following circumstances: (Education Code 48307)

1. The number of student transfers out of the district to a school district of choice has reached the limit specified in Education Code 48307 based on the district's average daily attendance.
2. The County Superintendent of Schools has given the district a negative budget certification or has determined that the district will not meet the state's standards and criteria for fiscal stability in the subsequent fiscal year exclusively as a result of student transfers from this district to a school district of choice.
3. The Board determines that the transfer would negatively impact any of the following: (Education Code 48307)
 - a. A court-ordered desegregation plan
 - b. A voluntary desegregation plan of the district, consistent with the California Constitution, Article 1, Section 31
 - c. The racial and ethnic balance of the district, consistent with the California Constitution, Article 1, Section 31

HVESD Interdistrict Transfers: Application and Admission Procedures

Guidelines

- Parents/guardians must initiate their requests for an Interdistrict Transfer (IDT) Agreement with the District of Residence. Typically, after the home district approves the request, it will be forwarded to Happy Valley for review and approval.
- Per the Santa Cruz County Interdistrict Attendance Agreement:
 1. Parents/Guardians are responsible for the transportation of the student.
 2. Students must comply with the terms and conditions of the district's attendance agreement, including academics, behavior and attendance.
 3. IDT's must be renewed annually.
- Failure of the parent/guardian to meet any timelines established by the school district shall be deemed an abandonment of the request. {Ed. Code 46600.2 (a)}

Application Procedure

Interdistrict Transfer – Upcoming School Year:

- Obtain approved IDT from your district of residence
- Submit the approved IDT to Happy Valley Elementary School District by the deadline. (See [HVESD Interdistrict Transfer Information](#), posted on the Happy Valley Elementary School Website.)

Admission Information

All IDT applications are not guaranteed. Once capacity limits are determined for the upcoming school year, IDT's will be prioritized as following. For all priority groups, each student is considered for admission on an individual basis.

Priority Registration 1A:

- Children of HVESD employees who reside outside district boundaries

Priority Registration 1B:

- A student who has been determined by staff of either the district of residence or district of proposed enrollment to be a victim of a documented act of bullying, as defined in Education Code 48900(r), committed by a student of the district of residence. (Ed Code 46600)
- Students in grades TK-6th who move out of the district during the school year who wish to continue in the district for the current school year.
- Students renewing interdistrict transfers for continuing enrollment. *Lowest priority will be given to students entering the 6th grade.*

Priority Group 2:

- Students who have a sibling attending school in the receiving district, avoid splitting the family's attendance.
- Written evidence is provided that the family will be moving into the District within the requested school year and would like the student to start the year in the District.

Priority Group 3:

- Other students who want to attend Happy Valley.

Notification of acceptance/denial:

The application window to submit interdistrict transfer paperwork is February 1st through March 1st. Families will be notified of their status (accepted, denied, or denied and waitlisted). HVESD will notify families of the final decision as soon as possible, but no later than 14 calendar days after the commencement of instruction in the school year for which the IDT is sought.

Revocation of Transfers

Students who transfer into HVESD may have their transfer eligibility revoked at any time if they do not comply with the terms of the Interdistrict Attendance Contract. This includes expectations around behavioral standards, academic progress and attendance.

For more information, please see [HVESD Interdistrict Transfer Information](#), posted on the Happy Valley Elementary School Website.

Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the Governing Board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State	Description
CA Constitution Article 1, Section 31	Nondiscrimination on the basis of race, sex, color, ethnicity, or national origin
Ed. Code 200	Educational equity
Ed. Code 41020	Requirement for annual audit
Ed. Code 46600-46611	Interdistrict attendance agreements
Ed. Code 48204	Residency requirements for school attendance
Ed. Code 48300-48317	Student attendance alternatives; school district of choice program
Ed. Code 48900	Grounds for suspension or expulsion
Ed. Code 48915	Expulsion; particular circumstances
Ed. Code 48915.1	Expelled individuals; enrollment in another district
Ed. Code 48918	Rules governing expulsion procedures
Ed. Code 48980	Parent/Guardian notifications
Ed. Code 48985	Notices to parents/guardians in language other than English
Ed. Code 52317	Regional Occupational Center/Program; enrollment of students; interdistrict attendance
Ed. Code 8151	Apprentices; exemption from interdistrict attendance agreement
Management Resources	Description
Attorney General Opinion	84 Ops.Cal.Atty.Gen. 198 (2001)
Attorney General Opinion	87 Ops.Cal.Atty.Gen. 132 (2004)
Court Decision	Walnut Valley Unified School District v. the Superior Court of Los Angeles County (2011) 192 Cal.App.4th 234
Court Decision	Crawford v. Huntington Beach Union High School District (2002) 98 Cal.App.4th 1275

Website	<u>CSBA District and County Office of Education Legal Services</u>
Website	<u>California Department of Education</u>
Website	<u>CSBA</u>

Cross References

Code	Description
1312.3	<u>Uniform Complaint Procedures</u>
1312.3	<u>Uniform Complaint Procedures</u>
3460	<u>Financial Reports And Accountability</u>
3460	<u>Financial Reports And Accountability</u>
3540	<u>Transportation</u>
3553	<u>Free And Reduced Price Meals</u>
5020	<u>Parent Rights And Responsibilities</u>
5020	<u>Parent Rights And Responsibilities</u>
5111	<u>Admission</u>
5111	<u>Admission</u>
5111.1	<u>District Residency</u>
5111.1	<u>District Residency</u>
5112.2	<u>Exclusions From Attendance</u>
5113.1	<u>Chronic Absence And Truancy</u>
5113.1	<u>Chronic Absence And Truancy</u>
5113.12	<u>District School Attendance Review Board</u>
5113.12	<u>District School Attendance Review Board</u>
5116.1	<u>Intradistrict Open Enrollment</u>
5116.1	<u>Intradistrict Open Enrollment</u>
5119	<u>Students Expelled From Other Districts</u>
5131.2	<u>Bullying</u>
5131.2	<u>Bullying</u>
5144.1	<u>Suspension And Expulsion/Due Process</u>
5144.1	<u>Suspension And Expulsion/Due Process</u>
5145.6-E(1)	<u>Parent/Guardian Notifications</u>

5145.6	<u>Parent/Guardian Notifications</u>
5145.6-E PDF(1)	<u>Parent/Guardian Notifications</u>
5145.6-E PDF(2)	<u>Parent/Guardian Notifications</u>
6173.1	<u>Education For Foster Youth</u>
6173.1	<u>Education For Foster Youth</u>
6173.2	<u>Education Of Children Of Military Families</u>
6173.2	<u>Education Of Children Of Military Families</u>
7160	<u>Charter School Facilities</u>
7160	<u>Charter School Facilities</u>
9000	<u>Role Of The Board</u>
9321	<u>Closed Session</u>

MK

7/14/2026

Memorandum of Understanding
Santa Cruz County Office of Education
DR. FARIS SABBAH, SUPERINTENDENT

This agreement is between the Santa Cruz County Office of Education (SCCOE)
and
Happy Valley Elementary School District

Statement of Purpose

The purpose of this agreement is to share

Provide comprehensive IT services to the District to enhance the educational environment by ensuring a robust, reliable, and secure IT infrastructure that supports both teaching and administrative functions. This will include remote support and on-site visits. All COE staff have been fingerprinted per Ed Code requirements.

Wherefore, SCCOE, and Happy Valley Elementary School District agree to the following:

1. Scope of Work:

See attached.

Scope of services include: network infrastructure, hardware and software management, cybersecurity, EDR, AV support, cloud services and virtualization, communication systems, helpdesk support management, & IT policy and compliance. This agreement will not exceed \$18,570. In May 2027 the Santa Cruz COE will invoice the District. Upon receipt of the documents, the District will reimburse the Santa Cruz COE for technology services.

TERMS: The term of this Agreement is from 7/1/2026 through 6/30/2027.

COMPENSATION AND TERMS OF PAYMENT: This Memorandum of Understanding shall not exceed \$ 18,570. The terms of the Agreement may be extended as mutually agreed by the parties by means of an addendum duly executed in writing by SCCOE and Happy Valley Elementary School District, also referenced as CONTRACTOR under this agreement.

2. Hold Harmless- Indemnification

Each party agrees to indemnify and hold harmless the other party (including, as the case may be, the party's Chief Executive Officer, its Board of Trustees, Superintendent, officers, agents, representatives and employees as the same may be constituted from time to time hereafter) and each of them from and against all liability, losses and/or damages or expenses or costs of judgments of any kind against the indemnified party that may arise in connection with the indemnifying party's (1) failure to perform under the terms of this Agreement, and/or (2) any intentional or criminal misconduct, negligence or gross negligence arising out of, or in connection with, indemnifying party's performance of this Memorandum of Understanding.

3. Criminal Background Check: By executing this Memorandum of Understanding, the CONTRACTOR agrees that if it is determined by the SUPERINTENDENT that the CONTRACTOR and/or their employees will have more than limited contact with students, a criminal background check through the Department of Justice in compliance with education code 42125.1 will be completed prior to services performed. If the CONTRACTOR requires a criminal background check as part of its own employment procedures, the CONTRACTOR shall

certify in writing to the SUPERINTENDENT that neither the employer, nor any of its employees have been convicted of a felony (education code 45125.1). All individuals employed by the CONTRACTOR and performing services for the SUPERINTENDENT shall be listed by name on the certification which will be attached to the agreement prior to signature by the SUPERINTENDENT's officials.

(a). Santa Cruz County Office of Education (SCCOE) Determination of Fingerprinting Requirements Application:

SCCOE has considered the totality of the circumstances concerning the Project and has determined that Contractor and Contractors employees:

SMA

_____ are subject to fingerprinting requirements of Education
Code section 42125.1 and paragraph (b) below is applicable.
Approved Background Check Certification form must be attached



_____ are not subject to fingerprinting requirements of Education
Code section 42125.1 and paragraph (c) below is applicable.

(b). (1) Contractor and all Contractor's employees working on the school site must submit or have submitted fingerprints in a manner authorized by the Department of Justice, together with the requisite fee as set forth in Ed Code Section 42125.1; (2) Contractor shall not permit any employee to come in contact with students until the Department of Justice has ascertained that the employee has not been convicted of a serious or violent felony; (3) The Contractor is required to fulfill these requirements at its own expense.

(c). Even if SCCOE has determined that fingerprinting is not required, the Contractor expressly acknowledges that the following conditions shall apply to any work performed by the Contractor and/or Contractor's employees on a school site: (1) Contractor and Contractor's employees shall check in with the school office each day immediately upon arriving at the school site; (2) Consultant and Consultant's employees shall inform school office staff of their proposed activities and location at the school site; (3) Contractor and Contractor's employees shall not use student restroom facilities and (4) If Contractor and/or Contractor's employees find themselves alone with a student, Contractor and Contractor's employees shall immediately contact the school office and request that a member of the school staff be assigned to the work location.

4. Compliance with Law

Both parties agree to comply with all federal, state, and local laws, rules, regulations, and ordinances that are applicable to this Agreement including, but not limited to, nondiscrimination because of race, color, ancestry, national origin, religion, sex, marital status, age, medical condition, handicap or other prohibited basis. All nondiscrimination rules or regulations required by law to be included in this Agreement are incorporated by this reference.

5. Insurance: CONTRACTOR under this MOU must submit proof of Commercial General Liability Insurance, Professional Liability Insurance and Worker's Compensation insurance.

- (a) Worker's Compensation insurance with statutory limits as required by the Labor Code or the State of California.
- (b) Commercial or Comprehensive General Liability insurance covering bodily injury and property damage using an occurrence policy form, in an amount no less than \$1,000,000 per occurrence,

\$2,000,000 aggregate. Such insurance shall include, but not be limited to: premises and operations liability, independent contractor liability, and personal injury liability. **The insurance provided should not contain any exclusions and/or limitations of coverage for mental, physical, emotional and/or sexual abuse including molestation.**

- (c) Automobile liability insurance covering bodily injury and property damage in an amount no less than \$1,000,000 combined single limit for each occurrence. Such insurance shall include coverage for owned, hired and non-owned vehicles.
- (d) Each such comprehensive or commercial general liability and automobile liability insurance policy shall be endorsed with the following specific language:
 - (1) The insurance provided herein is primary coverage to SCCOE with respect to any insurance or self-insurance programs maintained by SCCOE and no insurance held or owned by the SCCOE shall be called upon to contribute to a loss.
 - (2) This policy shall not be canceled or materially changed without first giving thirty (30) days prior written notice to SCCOE.
- (e) Documentation: The following documentation shall be submitted to the SCCOE:
 - (1) Properly executed certificates of insurance clearly evidencing all coverages, limits, and endorsements required above. The certificates shall be submitted prior to commencement of services under this MOU.
 - (2) Signed copies of the specified endorsements for each policy. Said endorsement copies shall be submitted within thirty (30) days of execution of this MOU.

This Memorandum of Understanding constitutes the final, complete and exclusive statement of the terms of the MOU between this CONTRACTOR and SCCOE pertaining to the subject matter of this Agreement and supersedes any and all other agreements, either oral or written, which may exist between CONTRACTOR and SCCOE. Both CONTRACTOR and SCCOE acknowledge that no representations, inducements, promises or agreements which are not embodied herein have been made, and that no agreement, statement, or promise not contained herein shall be binding on CONTRACTOR and SCCOE.

No amendment, alteration, or violation in the terms of this Agreement shall be valid unless made in writing and signed by both CONTRACTOR and SCCOE hereto.

Therefore, CONTRACTOR approves this Agreement with the Santa Cruz County Office of Education.

Department Check off:

	Contractor will have Student Contact (Yes or No) ☒
☒	If YES to Student Contact, Contractor has had required criminal background check
	Contractor has supplied proof of Liability Insurance for compensation Comprehensive General liability, Automobile and Worker's Compensation (WC required if contractor has employees)
	Contractor has supplied appropriate W-9/taxation documentation
	Franchise Tax Board forms for non-residents

Contractor Mailing Address: 3125 Branciforte Dr., Santa Cruz, CA 95065

Phone: 831-429-1456

Email Address: mstewart@hvesd.com

By: 
Contractor #1

Date: 07 / 01 / 2026

By: 
Deputy/Associate Superintendent

Date: 07 / 02 / 2026

By: _____
Contractor #2

Date: _____

By: 
Chief Human Resources Officer

Date: 07 / 07 / 2026

By: 
Deputy Superintendent, Business Services

Date: 07 / 13 / 2026

By: 
County Superintendent/Designee

Date: 07 / 14 / 2026

01-0086-0-0000-0000-8689-030-8111

Budget String



Budget Approval

Proposal for Technology Services

Executive Summary

The Santa Cruz COE Tech+ Team is pleased to present this proposal to provide comprehensive IT services to each Small School District. Our objective is to enhance the educational environment by ensuring a robust, reliable, and secure IT infrastructure that supports both teaching and administrative functions. This proposal will include 12 months of support and training for existing staff to become fully autonomous and onboarded in 2026-27. This will include remote support and maintenance, with on-site visits limited to 1-2 times a month. This will include network, systems, and end-point support as described below. All terms of this agreement will be discussed annually. All COE staff have been fingerprinted per Ed Code requirements.

Costs:

Salary: .15 FTE Estimated salary & benefit amount = \$19,570 for 2026-27 (include 3% increase due to CSEA agreement).

COE would cover .4 FTE to support a 1.0 FTE and utilize services elsewhere.

Device Management, including, but not limited to end-point detection, patch management, remote support, remote management, security, Google licenses, and asset tags. - \$22,570*

This agreement will not exceed: \$18,570 for 2026-27, which includes a \$4,000 discount for 2026-27.

****Please note the costs will be reviewed annually and potentially have a 3-5% increase pending COE contract with CSEA.***

Scope of Services

Network Infrastructure

- **Assessment and Design:** Conduct a thorough assessment of the current network infrastructure. Design a scalable and resilient network architecture to meet current and future needs.
- **Implementation:** Install and configure routers, switches, and wireless access points to ensure seamless connectivity across all school district facilities, following best practices.
- **Maintenance and Monitoring:** Provide 24/7 network monitoring and regular maintenance to ensure optimal performance and quick resolution of issues.

Hardware and Software Management

- Device Management: Provision, configure, and manage desktops, laptops, tablets, and other devices used by students and staff.
- Software Deployment and Licensing: Manage the deployment and licensing of all necessary educational and administrative software.
- Technical Support: Provide a helpdesk for troubleshooting and resolving hardware and software issues.
- Mobile Device Management: Enrollment in our MDM and Remote Monitoring and Management solutions

Cybersecurity

- Security Assessment: Perform regular security assessments and vulnerability scans.
- Data Protection: Ensure data backup strategies are in place.

Endpoint Detection and Response (EDR)

- EDR Implementation: Deploy advanced EDR solutions to detect, investigate, and respond to potential threats on all endpoints.
- Threat Monitoring: Provide continuous monitoring to identify and respond to suspicious activities in real-time.
- Incident Response: Implement a structured incident response process to quickly contain and remediate threats, minimizing impact on the school district's operations.

Audio-Visual (AV) Support

- Classroom AV Solutions: Install and maintain projectors, interactive whiteboards, sound systems, and other AV equipment to enhance classroom instruction.
- Multipurpose Room AV Systems: Design and support AV systems for auditoriums, gymnasiums, and other multipurpose spaces, ensuring high-quality audio and video for events and presentations.
- Video Conferencing: Set up and manage video conferencing systems to support remote learning and virtual meetings.
- Ongoing Maintenance: Provide regular maintenance and support to ensure all AV equipment is functioning properly.

Cloud Services and Virtualization

- Cloud Integration: Facilitate the integration and management of cloud services, including Google Workspace for Education, Microsoft Office 365, and other cloud-based educational tools.
- Virtualization: Implement server and desktop virtualization to improve resource utilization and management.

Communication Systems

- Email and Collaboration Tools: Manage and support email systems, collaboration platforms, and video conferencing tools.
- Phone Systems: Perform an assessment and provide options to migrate to the COE's managed VoIP phone systems for efficient communication.
- Bells/Intercoms: Assess the current infrastructure for both the school bells and intercom systems and make recommendations for improvements and functionality.

Helpdesk Support Management

- Helpdesk Onboarding: Integrate the school district into our Helpdesk system to streamline support requests and service delivery.
- Ticketing System: Implement a ticketing system to track and manage all IT support requests, ensuring timely resolution and accountability.
- Service Level Agreements (SLAs): Define SLAs to guarantee response and resolution times for different types of support issues.
- Communication and Reporting: Provide regular updates and reports on the status of support requests and overall helpdesk performance.
- Feedback and Improvement: Collect feedback from users to continuously improve helpdesk services and ensure high satisfaction levels.
- Remote Support: Will rely on remote support when possible for expedited service, with a tech being onsite 1-2 times a month for in-person support.

IT Policy and Compliance

- Policy Development: Assist in developing IT policies and procedures that comply with state and federal regulations.
- Compliance Management: Assist in compliance with FERPA, COPPA, and other relevant laws.

District Responsibility

Security and Device Refresh

- Abide by all COE security practices and policies
- Abide by COE's refresh policy

Point of Contact

- Available for a monthly sync with the COE Tech+ team to have an opportunity to collaborate on current and future projects.
- Assist with virtual support opportunities when available to expedite the resolution of service issues.

Infrastructure Access

- Provide access to school grounds as needed.
- Provide copies of keys to required buildings and telecommunications closets.
- Provide access to any passwords and accounts for all needed devices and appliances on the network for support and monitoring purposes.

This agreement does not include:

- Facilities work, including but not limited to: installing equipment, mounting/drilling, comprehensive cabling, electrical, etc.
- Device costs
- SIS support

Device procurement will occur via county cash transfer. Each Small School District can purchase devices from the existing tech stock in the IT Department at the Santa Cruz COE. The tech stock devices are priced at a discounted bulk rate under COE IT procurement contracts. Upon approval from the Small School District Superintendent, an account string will be shared with the Santa Cruz COE IT Department to proceed with a county cash transfer. All procurement specifications must be approved by Santa Cruz COE IT staff.

If additional services, devices, hardware, software, etc. are deemed necessary, they must be requested and approved by the Small School Superintendent. Costs will be billed by the Santa Cruz COE to the Small School District requesting the additions.

Conclusion

Santa Cruz COE Tech+ is committed to delivering exceptional IT services that will empower each Small School District to achieve its educational objectives. We look forward to the opportunity to partner with you and transform the technological landscape of your school district.

Title	Happy Valley Technology Services 26/27
File name	MOU_Updated_SEP_2025.docx.pdf and 1 other
Document ID	ea431264df9123dfa899f891b88f678c15093474
Audit trail date format	MM / DD / YYYY
Status	Signed

Document History

SENT	06 / 25 / 2026 13:52:23 UTC-7	Sent for signature to Michelle Stewart (mstewart@hvesd.com), Jason Borgen (jborgen@santacruzcoe.org), Scott Hill (shill@santacruzcoe.org), Terra Lee (tle@santacruzcoe.org), Troy Cope (tcope@santacruzcoe.org), Melissa Lopez (mlopez@santacruzcoe.org), Rebecca Olker (rolker@santacruzcoe.org), Faris Sabbah (fsabbah@santacruzcoe.org) and Michelle Kennedy (mkennedy@santacruzcoe.org) from lchavez@santacruzcoe.org IP: 205.155.10.252
VIEWED	07 / 01 / 2026 11:31:52 UTC-7	Viewed by Michelle Stewart (mstewart@hvesd.com) IP: 205.155.20.254
SIGNED	07 / 01 / 2026 11:32:50 UTC-7	Signed by Michelle Stewart (mstewart@hvesd.com) IP: 205.155.20.254
VIEWED	07 / 02 / 2026 14:45:56 UTC-7	Viewed by Jason Borgen (jborgen@santacruzcoe.org) IP: 146.75.154.154

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Document History

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Document ID	ea431264df9123dfa899f891b88f678c15093474
Audit trail date format	MM / DD / YYYY
Status	Signed

Document History

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Title	Happy Valley Technology Services 26/27
File name	MOU_Updated_SEP_2025.docx.pdf and 1 other
Document ID	ea431264df9123dfa899f891b88f678c15093474
Audit trail date format	MM / DD / YYYY
Status	Signed

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 COMPLETED	07 / 15 / 2026 13:06:22 UTC-7	The document has been completed.

ReqPay12d

Board Report

Checks Dated 06/09/2026 through 07/30/2026

Check Number	Check Date	Pay to the Order of	FF-RRRR-Y-GGGG-FFFF-OOOO-SSS-MMM	Comment	Expensed Amount	Check Amount
1138217	06/15/2026	A TOOL SHED		01-0000-0-0000-8100-5600-200-2801 CHIPPER FOR YARD MAINT		1,351.27
1138218	06/15/2026	AMERGIS HEALTHCARE STAFFING		01-6500-0-5760-1190-5100-200-1304 LO SPED AIDE		800.00
1138219	06/15/2026	AT&T		01-0000-0-0000-2700-5900-200-2801 PHONE	125.87	
				01-0000-0-0000-7200-5900-200-2801 PHONE	41.95	167.82
1138220	06/15/2026	CLASS LEASING, LLC		01-0000-0-0000-9100-7438-200-BTRM BATHROOM LEASE	902.92	
				01-0000-0-0000-9100-7439-200-BTRM BATHROOM LEASE	2,020.25	2,923.17
1138221	06/15/2026	GREENWASTE RECOVERY INC		01-0000-0-0000-8100-5523-200-2801 GARBAGE		607.23
1138222	06/15/2026	HARSHWAL & COMPANY, LLP		01-0000-0-0000-7191-5809-200-2801 AUDIT PROGRESS		4,189.50
1138223	06/15/2026	MICHELLE HODSDON		01-0000-0-0000-3120-5800-200-2801 PSYCH SERVICES	2,931.25	
				01-6546-0-1110-3120-5800-200-0000 PSYCH SERVICES	5,337.50	8,268.75
1138224	06/15/2026	Stewart, Michelle A		01-0700-0-1110-1000-4300-200-2801 REIMBURSE LCAP STUDENTS		57.21
1139057	06/22/2026	HARSHWAL & COMPANY, LLP		01-0000-0-0000-7191-5809-200-2801 2025 AUDIT RETAINER		1,596.00
1139058	06/22/2026	Lynd, Paige L		01-0000-0-0000-7200-5200-200-2801 MILEAGE REIMBURSEMENT		93.24
1139059	06/22/2026	PACIFIC GAS & ELECTRIC		01-0000-0-0000-8100-5511-200-2801 PUMP HOUSE		28.22
1139988	07/06/2026	ABRITE		01-6500-0-5760-1190-5100-200-1304 SPED AIDE		7,461.08
1139989	07/06/2026	ACE PORTABLE SERVICES		01-0000-0-0000-8100-5600-200-2801 PORTA POTTY FOR CALFIRE WORK		238.74
1139990	07/06/2026	AMERGIS HEALTHCARE STAFFING		01-6500-0-5760-1190-5100-200-1304 LO SPED AIDE		800.00
1139991	07/06/2026	BETHEL JANITORIAL SERVICE		01-0000-0-0000-8100-5524-200-2801 SUMMER CLEAN AND PREP	3,000.00	
				01-2600-0-0000-8100-5524-200-0000 SUMMER CLEAN AND PREP	1,000.00	4,000.00
1139992	07/06/2026	DASSEL'S PETROLEUM		01-0000-0-0000-8100-5511-200-2801 PROPANE		163.39

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.

ERP for California

Page 1 of 4

ReqPay12d

Board Report

Checks Dated 06/09/2026 through 07/30/2026

Check Number	Check Date	Pay to the Order of	FF-RRRR-Y-GGGG-FFFF-0000-SSS-MMM	Comment	Expensed Amount	Check Amount
1139993	07/06/2026	HONU INTERVENTION, INC	01-6500-0-5760-1190-5100-200-1304	LO SPED AIDE		825.00
1139994	07/06/2026	K&D LANDSCAPING INC	01-2600-0-1110-1000-5800-200-0000	GOPHER MITIGATION		46,550.00
1139995	07/06/2026	PACIFIC GAS & ELECTRIC	01-0000-0-0000-8100-5511-200-2801	ELECTRIC	100.77	
1139996	07/06/2026	SANTA CRUZ MUNICIPAL UTILITIES		STREET LIGHT	10.42	111.19
1139997	07/06/2026	US BANK	01-0000-0-0000-8100-5514-200-2801	WATER	94.20	
			01-2600-0-0000-8100-5514-200-0000	WATER	31.40	125.60
1139998	07/06/2026	XEROX CORPORATION	01-0700-0-1110-1000-5808-200-2801	LCAP ALL SCHOOL FIELD TRIP, ROOM 3	910.30	
			01-9009-0-1110-1000-4300-200-RM03	LCAP ALL SCHOOL FIELD TRIP, ROOM 3	110.34	1,020.64
1139999	07/06/2026	ACSA	01-1100-0-0000-7100-5600-200-3000	COPIER LEASE AND USAGE	85.52	
			01-1100-0-0000-7200-5600-200-3000	COPIER LEASE AND USAGE	21.38	
			01-1100-0-1110-1000-5600-200-3000	COPIER LEASE AND USAGE	320.71	427.61
1140000	07/06/2026	AT&T	01-0000-0-0000-7110-5300-200-2801	26-27 ACSA DUE		1,572.91
1140001	07/06/2026	CALIFORNIA SCHOOL BOARDS ASSOC	01-0000-0-0000-2700-5900-200-2801	INTERNET		152.81
1140002	07/06/2026	JM CONSTRUCTION	01-0000-0-0000-7100-5800-200-2801	CSBA GAMUT POLICY 26-27	3,900.00	
			01-0000-0-0000-7110-5300-200-2801	CSBA MEMBERSHIP 26-27	2,091.00	5,991.00
1140003	07/06/2026	SAN JOAQUIN COE	01-8150-0-0000-8100-5600-200-0000	ROOM 6 DOOR REPAIR		1,754.40
1140004	07/06/2026	SC SYSTEMS INC	01-0000-0-0000-7200-5800-200-2801	EDJOIN FEES 26-27		800.00
1140005	07/06/2026	SISC 3	01-0000-0-0000-8100-5800-200-2801	FIRE MONITORING SERVICE		105.00
1140006	07/06/2026	SMALL SCHOOL DIST. ASSOC.	01- - - - -9531- - JULY MEDICAL		2,710.00	
			01- - - - -9541- - JULY MEDICAL		9,638.00	12,348.00
1140007	07/06/2026	US BANK	01-0000-0-0000-7110-5300-200-2801	SSDA MEMBERSHIP 26-27		900.00
			01-4035-0-0000-2700-5200-200-2356	CONF		458.80

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.

002 - Happy Valley Elementary School District

Generated for Paige Lynd (PLYND), Jul 30 2026 8:56AM

ReqPay12d

Board Report

Checks Dated 06/09/2026 through 07/30/2026

Check Number	Check Date	Pay to the Order of	FF-RRRR-Y-GGGG-FFFF-0000-\$\$\$-MMM	Comment	Expensed Amount	Check Amount
1140822	07/13/2026	The Fidget Game LTD Company	01-6500-0-5760-1120-4300-200-1304	RSP MATERIALS AND SUPPLIES		23.37
1141468	07/20/2026	AMERGIS HEALTHCARE STAFFING	01-6500-0-5760-1190-5100-200-1304	LO SPED AIDE JUNE		1,200.00
1141469	07/20/2026	AT&T	01-0000-0-0000-2700-5900-200-2801	PHONE JUNE	126.20	
			01-0000-0-0000-7200-5900-200-2801	PHONE JUNE	42.07	168.27
1141470	07/20/2026	BLUE WATER SEDANS & LIMOUSINES	01-6500-0-5760-3600-5800-200-1304	SPED TRANSPORT JUNE		2,100.00
1141471	07/20/2026	EMPLOYMENT DEVELOPMENT DEPT	01- -- - -9515- - QUARTER 2 SUI			118.31
1141472	07/20/2026	GREENWASTE RECOVERY INC	01-0000-0-0000-8100-5523-200-2801	GARBAGE JUNE		607.23
1141473	07/20/2026	LOZANO SMITH	01-0000-0-0000-7191-5809-200-2801	UNION NEGOTIATIONS		2,117.06
1141474	07/20/2026	SPROUTS SC	01-2600-0-1110-1000-5800-200-0000	SUMMER ELOP PROGRAM JUNE		1,225.00
1141475	07/20/2026	BLUE WATER SEDANS & LIMOUSINES	01-6500-0-5760-3600-5800-200-1304	SPED TRANS JULY		750.00
1141476	07/20/2026	CLASS LEASING, LLC	01-0000-0-0000-9100-7438-200-BTRM	RESTROOM LEASE	887.94	
			01-0000-0-0000-9100-7439-200-BTRM	RESTROOM LEASE	2,035.23	2,923.17
1141477	07/20/2026	ESSENTIAL OPERATIONS INC	01-8150-0-0000-8100-5600-200-0000	SEPTIC REPAIR		2,500.00
1141478	07/20/2026	GAONA, JESUS	01-0000-0-0000-8100-4350-200-2801	REIMBURSE MAINT SUPPLIES		32.31
1141479	07/20/2026	GOOD CLEAN SUN	01-8150-0-0000-8100-5600-200-0000	SOLAR CLEANING		270.00
1141480	07/20/2026	HARSHWAL & COMPANY, LLP	01-0000-0-0000-7191-5809-200-2801	SFP AUDIT		3,500.00
1141481	07/20/2026	K&D LANDSCAPING INC	01-2600-0-1110-1000-5800-200-0000	GOPHER MITIGATION		46,550.00
1141482	07/20/2026	PACIFIC GAS & ELECTRIC	01-0000-0-0000-8100-5511-200-2801	PUMP HOUSE		29.91
1141883	07/27/2026	ESTRADA HERRERA, CARLOS	01-8150-0-0000-8100-5600-200-0000	YARD MAINT		900.00

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.

002 - Happy Valley Elementary School District

Generated for Paige Lynd (PLYND), Jul 30 2026 8:56AM

Checks Dated 06/09/2026 through 07/30/2026

Check Number	Check Date	Pay to the Order of	FF-RRRR-Y-GGGG-FFFF-0000-SSS-MMM	Comment	Expensed Amount	Check Amount
1141884	07/27/2026	PACIFIC GAS & ELECTRIC	01-0000-0-0000-8100-5511-200-2801 ELECTRIC STREET LIGHT		25.20 9.47	34.67
1141885	07/27/2026	SANTA CRUZ FIRE EQUIPMENT CO	01-8150-0-0000-8100-5600-200-0000 FIRE EXT SERVICE			513.96
1141886	07/27/2026	SC SYSTEMS INC	01-8150-0-0000-8100-5600-200-0000 FIRE ALARM SERVICE			324.59
Total Number of Checks					51	171,776.43

Fund Recap

Fund	Description	Check Count	Expensed Amount
01	GENERAL FUND	51	171,776.43
Total Number of Checks		51	171,776.43
Less Unpaid Tax Liability			.00
Net (Check Amount)			171,776.43

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.