

OAK VALLEY UNION ELEMENTARY SCHOOL DISTRICT

REGULAR MEETING of the GOVERNING BOARD

Tuesday, June 27, 2023

AGENDA

TIME: 4:00pm

PLACE: Main Office Conference Room

CALL TO ORDER AND ROLL CALL

BOARD MEMBERS:

Mr. Doug Mederos,
Mr. John Mendonca, Clerk
Mr. Joey Benevedes, Trustee
Mr. Mark Nunes, Trustee
Mr. Joseph Meneses, Trustee

PLEDGE OF ALLEGIANCE

(1.0) APPROVAL OF AGENDA

Motion by _____ Second _____ ACTION ()

(2.0) APPROVAL OF MINUTES

The minutes of the regular meeting held on June 13, 2023 are presented for Board approval.

Motion by _____ Second _____ ACTION ()

(3.0) QUESTIONS FROM THE FLOOR AND INTRODUCTIONS OF GUESTS

At this time, any person wishing to speak to any item not on the agenda for this meeting may be granted **(5) minutes** to speak to the Board with a maximum time of 15 minutes per item, unless otherwise extended by the board.

(Action cannot be taken on anything that is not already on the agenda).

(4.0) CORRESPONDENCE:

(5.0) ADMINISTRATORS' REPORTS

1. *Superintendent's Report*
 - A. *Wellness Policy Triennial Assessment Results*
 - B. *Facilities Master Plan*
 - C. *Educational Rights and Remove Instructional Materials letter from State Superintendent Thurman, Governor Newsom, and Attorney General Bonta*
 - D. *Capital Improvement Plan*
 - E. *Work calendar 23/24*



(6.0) BUSINESS SERVICES

- 1.) Approval authorization to pay vouchers as presented.

Motion by _____ Second _____ ACTION ()

- 2.) Approval of Budget Revisions as presented. NONE

Motion by _____ Second _____ ACTION ()

(7.0) DISTRICT ADMINISTRATION

- 1.) Approval of Agreement with VUSD for transportation services.

Costs: 50,442.76

Funding Source: LCFF Transportation Add-on

Motion by _____ Second _____ ACTION ()

- 2.) Approval of contract with Morris Levin and Son, Inc. for installation of electricity to the Oak Valley Farm.

Costs: 54,073

Funding Source: Deferred Maintenance

Motion by _____ Second _____ ACTION ()

(8.0) CLOSED SESSION

- 1.) Employment, Resignations, Transfers, etc. of Certificated and Classified Personnel (Gov. Code, § 54957)

(9.0) RECONVENE IN REGULAR SESSION

- 1.) Employment, Resignations, Transfers, Termination, etc. of Certificated and Classified Personnel (Gov. Code, § 54957)

Motion by _____ Second _____ ACTION ()

(10.0) ORGANIZATIONAL BUSINESS

(Consideration of any item any member of the Board wishes to place on the Agenda for the next meeting.)

(11.0) ADJOURNMENT

Motion by _____ Second _____ ACTION ()



ANNOUNCEMENT OF NEXT REGULAR BOARD MEETING

July 25, 2023 @ 4:00 pm District Office conference room

This agenda may be made available in an appropriate alternative format for a person with a disability, upon request. If a disability-related modification or accommodation, including auxiliary aids or services, is needed, please contact **Heather Pilgrim, Ed.S., Superintendent**, at least one week in advance of the meeting, at **688-2909**. Requests made closer to the meeting may not be able to be accommodated.

OAK VALLEY UNION ELEMENTARY SCHOOL DISTRICT
REGULAR MEETING of the GOVERNING BOARD
Tuesday, June 13, 2023
MINUTES

TIME: 4:00pm

PLACE: District Conference Room

CALL TO ORDER AND ROLL CALL

BOARD MEMBERS:

Mr. Doug Mederos, President	Present
Mr. John Mendonca, Clerk	Present
Mr. Joey Benevedes, Trustee	Present
Mr. Mark Nunes, Trustee	Present
Mr. Joseph Meneses, Trustee	Present

PLEDGE OF ALLEGIANCE

(1.0) APPROVAL OF AGENDA

Motion by M. Nunes Second J. Mendonca ACTION (4-0)

(2.0) APPROVAL OF MINUTES

The minutes of the regular meeting held on May 23, 2023 are presented for Board approval.

Motion by J. Benevedes Second J. Mendonca ACTION (4-0)

(3.0) QUESTIONS FROM THE FLOOR AND INTRODUCTIONS OF GUESTS

At this time, any person wishing to speak to any item not on the agenda for this meeting may be granted **(5) minutes** to speak to the Board with a maximum time of 15 minutes per item, unless otherwise extended by the board.

(Action cannot be taken on anything that is not already on the agenda).

Supt. Pilgrim introduced CPA, Tyger Bates who will assist Business Manager, Gabby Gutierrez in proposing the 2023-2024 Fiscal Budget.

(4.0) CORRESPONDENCE:

(4.1) Thank you card from Tulare Target Archers'

Supt. Pilgrim read aloud the Thank You card from Tulare Target Archers' thanking Oak Valley for letting them use our facilities. The letter also included a generous donation.

(5.0) ADMINISTRATORS' REPORTS

1. Superintendent's Report:
 - A. Local Performance Indicator Review

Supt. Pilgrim reviewed each of the local indicators with the board indicating the status of how Oak Valley is performing and meeting state requirements.

(6.0) BUSINESS SERVICES

- 1.) Approval authorization to pay vouchers as presented.

Motion by J. Mendonca Second M. Nunes ACTION (5-0)

- 2.) Approval of Budget Revisions as presented.

Motion by J. Benevedes Second J. Meneses ACTION (5-0)

- 3.) Approval of Oak Valley Union Elementary School District's 2023-2024 proposed Fiscal Budget.

Motion by J. Benevedes Second M. Nunes ACTION (5-0)

Gabby Gutierrez, Business Manager reviewed the multi-year projections in detail. Discussion on its contents and questions were answered.

- 4.) Approval of SB 858 Excess of State Recommended Reserves Disclosure for Proposal of 2022-2023 Budget

Motion by M. Nunes Second J. Mendonca ACTION (5-0)

Gabby Gutierrez, Business Manager reviewed this document detailing how reserves are being allocated for future use.

(7.0) DISTRICT ADMINISTRATION

- 1.) Approval of ProYouth-ELOP grants agreement for 23/24SY.

Motion by J. Benevedes Second J. Meneses ACTION (5-0)

Supt. Pilgrim presented the agreement to keep the afterschool program, ProYouth HEART, ongoing for the 23-24 School to the board for approval.

- 2.) Approval of GASB 74/75 actuarial valuation services contract with Total Compensation Systems, Inc
Costs: 4,455.00
Funding Source: General Fund

Motion by J. Meneses Second J. Mendonca ACTION (5-0)

Supt. Pilgrim presented the renewal of the contract, GASB 74/75 that evaluates the OPEB cost.



- 3.) Approval of math adoption: McGraw-Hill, Reveal Math for K thru 8th grade
Costs: 21,604.32
Funding Source: Restricted Lottery

Motion by M. Nunes Second J. Benevedes ACTION (5-0)

Supt. Pilgrim stated that teachers were happy using McGraw-Hill, Reveal Math and would like to adopt it for the 2023-2024 school year.

- 4.) Approval of Annual Statement of Need for the 23/24SY.

Motion by J. Benevedes Second M. Nunes ACTION (5-0)

Supt. Pilgrim reviewed the statement of need for Substitutes and answered any questions from the board.

- 5.) Approval of the Oak Valley Union Elementary School District's 2023-2024 Local Control Accountability Plan (LCAP), LCAP Supplement, Budget Overview for Parents, and LCAP/LCP Annual Update.

Motion by J. Mendonca Second J. Benevedes ACTION (5-0)

Supt. Pilgrim reviewed the LCAP before the board and questions were answered.

- 6.) Approval of the Resolution 2023-6 In the Matter of the Spending Determination for Funds Received from the Education Protection Account pursuant to Article XIII, Section 36 of the California Constitution 2023-24 Fiscal Year.

Motion by J. Mendonca Second M. Nunes ACTION (5-0)

Ayes: Mederos, Mendonca, Benevedes, Nunes, and Meneses

Noes:

Abstain:

Absent:

Supt. Pilgrim presented the Resolution in the matter of Spending Determination for Funds Received from the Education Protection Account for approval noting it is used for Certificated Personnel only

- 7.) Approval of Resolution 2023-3 in the matter of Authorizing Inter-fund Loan for Cash Flow Purposes

Motion by J. Benevedes Second J. Mendonca ACTION (5-0)

Ayes: Mederos, Mendonca, Benevedes, Nunes, and Meneses

Noes:

Abstain:

Absent:

Supt. Pilgrim presented the resolution in the matter of Authorizing Inter-fund Loans for cash flow purposes for approval.

- 8.) Approval of Resolution 2023-4 in the matter of Authorizing Inter-fund Transfers in Accordance with the Budget

Motion by M. Nunes Second J. Benevedes ACTION (5-0)

Ayes: Mederos, Mendonca, Benevedes, Nunes, and Meneses

Nayes:

Abstain:

Absent:

Gabby, Business Manager, explained that this allows the district to move cash from one account to the other while waiting for certain funds to be acquired.

- 9.) Approval of Resolution 2023-5 in the matter of Authorization for County Superintendent of Schools to make year-end Budget Transfers.

Motion by J. Benevedes Second J. Meneses ACTION (5-0)

Ayes: Mederos, Mendonca, Benevedes, Nunes, and Meneses

Noes:

Abstain:

Absent:

Supt. Pilgrim presented the resolution in the matter of Authorization for County Superintendent of Schools to make year-end Budget Transfers for approval.

- 10.) Approval of annual certification regarding self-insured workers compensation claims indicating that the school district is not self-insured for workers' compensation claims.

Motion by J. Benevedes Second J. Meneses ACTION (5-0)

Supt. Pilgrim presented the annual certification regarding the district is not self-insured for workers' compensation claims for approval.

- 11.) Approval of Inter-District renewal list for 2023-2024 SY

Motion by M. Nunes Second J. Meneses ACTION (5-0)

Tulare - 274, Pixley – 4, Visalia – 12, Buena Vista – 4, Palo Verde – 1, Waukena – 13, and Lakeside Union – 1

Inter-district transfers for renewal and initial requests were submitted by the Superintendent for the upcoming 23-24 school year and presented for approval.

(8.0) CLOSED SESSION

- 1.) Employment, Resignations, Transfers, etc. of Certificated and Classified Personnel (Gov. Code, § 54957)
- 2.) Labor Negotiations (Gov. Code, 3549.1)

(9.0) RECONVENE IN REGULAR SESSION

- 1.) Approval of Employment, Resignations, Transfers, etc. of Certificated and Classified Personnel (Gov. Code, § 54957)

Classified Resignation: Haley Talley, Instructional Aide

Classified Transfer: Emily Hererra from Cafeteria Aide to PE Instructional Aide

Motion by J. Mendonca Second J. Meneses ACTION (5-0)

(10.0) ORGANIZATIONAL BUSINESS

(Consideration of any item any member of the Board wishes to place on the Agenda for the next meeting.)

(11.0) ADJOURNMENT @ 6:40pm

Motion by J. Meneses Second M. Nunes ACTION (5-0)

ANNOUNCEMENT OF NEXT REGULAR BOARD MEETING

June 27, 2023 @ 4:00 pm District conference room

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Oak Valley Union Elementary School District
Triennial Assessment
Completed May 25, 2023

In accordance with the 2016 Final Rule, schools must complete an assessment of their district wellness policy every three years, at minimum. The assessment must include several components:

1. Comparison of the district's School Wellness Policy to a model policy;
2. Measurement of the extent to which the district is in compliance with the policy;
3. Description of the district's progress toward achieving the goals described in the policy.

Oak Valley Union Elementary School District used the WellSAT Triennial Assessment tools and worksheets to fulfill the requirements of the Triennial Assessment. Results are detailed below.

PART 1: Comparison to a model School Wellness Policy

- See completed WellSAT 3.0 Scorecard (attached).

PART 2: Local measurement of compliance with School Wellness Policy

- The district performed interviews with district- and school-level personnel, using the WellSAT-I tool. Scores were recorded using the WellSAT-I Scorecard and analyzed using the WellSAT Worksheet 3 (see attached).

PART 3: Description of the district's progress toward achieving goals described in the policy

- See completed WellSAT Worksheet 4 (attached).



Your District's Scorecard

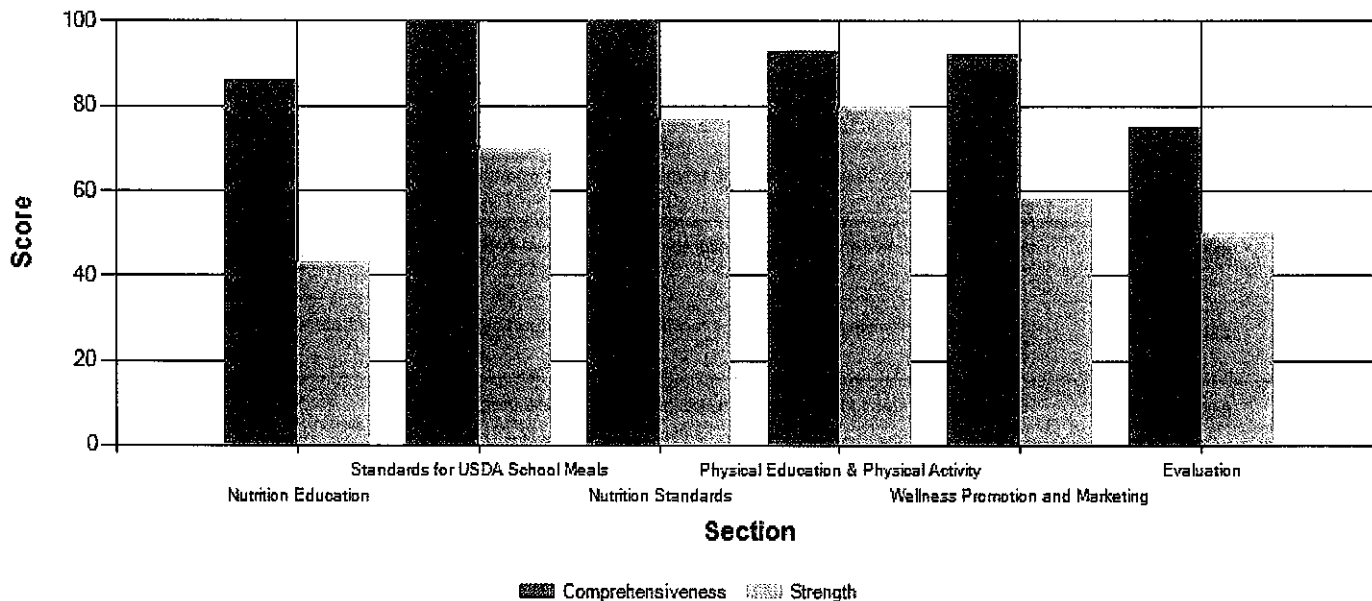
[Close window](#)

Congratulations! You have completed the WellSAT. Check out your scorecard below. It contains details of how you scored on each item and section of the assessment. It also provides resources that will help you improve your district's school wellness policy.

Items with a rating of "0" (item not addressed in the policy) or "1" (general or weak statement addressing the item) can be improved by referring to the resource links next to the items. Multiple resources addressing school wellness policy topics are available online. To avoid duplicative information, we have included a small selection, rather than a comprehensive listing.

Version: 3.0

Policy Name: Oak Valley UESD



Section 1. Nutrition Education

Rating






NE1	Includes goals for nutrition education that are designed to promote student wellness.	1
NE2	Nutrition education teaches skills that are behavior focused, interactive, and/or participatory.	2
NE3	All elementary school students receive sequential and comprehensive nutrition education.	0
NE4	All middle school students receive sequential and comprehensive nutrition education.	2
NE6	Nutrition education is integrated into other subjects beyond health education	2
NE7	Links nutrition education with the school food environment.	1
NE8	Nutrition education addresses agriculture and the food system.	1
Subtotal for Section 1	Comprehensiveness Score: Count the number of items rated as "1" or "2" and divide this number by 7 (the number of items in this section). Multiply by 100. Do not count an item if the rating is "0."	86
	Strength Score: Count the number of items rated as "2" and divide this number by 7 (the number of items in this	43

section). Multiply by 100.	
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[Click here for Nutrition Education Resources](#)

Section 2. Standards for USDA Child Nutrition Programs and School Meals



Rating





SM1	 Assures compliance with USDA nutrition standards for reimbursable school meals.	2
SM2	Addresses access to the USDA School Breakfast Program.	2
SM3	 District takes steps to protect the privacy of students who qualify for free or reduced priced meals.	2
SM4	Addresses how to handle feeding children with unpaid meal balances without stigmatizing them.	2
SM5	Specifies how families are provided information about determining eligibility for free/reduced priced meals.	2
SM6	Specifies strategies to increase participation in school meal programs.	1
SM7	Addresses the amount of "seat time" students have to eat school meals.	2
SM8	 Free drinking water is available during meals.	1
SM9	 Ensures annual training for food and nutrition services staff in accordance with USDA Professional Standards.	1
SM10	 Addresses purchasing local foods for the school meals program.	2
Subtotal for Section 2	Comprehensiveness Score: Count the number of items rated as "1" or "2" and divide this number by 10 (the number of items in this section). Multiply by 100. Do not count an item if the rating is "0."	100
	Strength Score: Count the number of items rated as "2" and divide this number by 10 (the number of items in this section). Multiply by 100.	70

[Click here for School Food Resources](#)

Section 3. Nutrition Standards for Competitive and Other Foods and Beverages

Rating


NS1	 Addresses compliance with USDA nutrition standards (commonly referred to as Smart Snacks) for all food and beverages sold to students during the school day.	2
NS2	USDA Smart Snack standards are easily accessed in the policy.	2
NS3	 Regulates food and beverages sold in a la carte.	2




NS4	 Regulates food and beverages sold in vending machines.	2
NS5	 Regulates food and beverages sold in school stores.	2
NS6	 Addresses fundraising with food to be consumed during the school day.	2
NS7	Exemptions for infrequent school-sponsored fundraisers with food to be consumed during the school day.	2
NS8	Addresses foods and beverages containing caffeine at the high school level.	2
NS9	 Regulates food and beverages served at class parties and other school celebrations in elementary schools.	1
NS10	Addresses nutrition standards for all foods and beverages served to students after the school day, including, before/after care on school grounds, clubs, and after school programming.	1
NS11	Addresses nutrition standards for all foods and beverages sold to students after the school day, including before/after care on school grounds, clubs, and after school programming.	2
NS12	Addresses food not being used as a reward.	1
NS13	Addresses availability of free drinking water throughout the school day.	2
Subtotal for Section 3	Comprehensiveness Score: Count the number of items rated as "1" or "2" and divide this number by 13 (the number of items in this section). Multiply by 100. Do not count an item if the rating is "0."	100
	Strength Score: Count the number of items rated as "2" and divide this number by 13 (the number of items in this section). Multiply by 100.	77

[Click here for Nutrition Standards Resources](#)

Section 4. Physical Education and Physical Activity

Rating



PEPA1	 There is a written physical education curriculum for grades K-12.	1
PEPA2	The written physical education curriculum for each grade is aligned with national and/or state physical education standards.	2
PEPA3	Physical education promotes a physically active lifestyle.	2
PEPA4	Addresses time per week of physical education instruction for all elementary school students.	2
PEPA5	Addresses time per week of physical education instruction for all middle school students.	2
PEPA7	Addresses qualifications for physical education teachers for grades K-12.	2
PEPA8	Addresses providing physical education training for physical education teachers.	1

PEPA9	Addresses physical education exemption requirements for all students.	2
PEPA10	Addresses physical education substitution for all students.	2
PEPA11	 Addresses family and community engagement in physical activity opportunities at all schools.	2
PEPA12	 Addresses before and after school physical activity for all students including clubs, intramural, interscholastic opportunities.	2
PEPA13	Addresses recess for all elementary school students.	2
PEPA14	 Addresses physical activity breaks during school.	2
PEPA15	Joint or shared-use agreements for physical activity participation at all schools.	2
PEPA16	District addresses active transport (Safe Routes to School) for all K-12 students who live within walkable/bikeable distance.	0
Subtotal for Section 4	Comprehensiveness Score: Count the number of items rated as "1" or "2" and divide this number by 15 (the number of items in this section). Multiply by 100. Do not count an item if the rating is "0."	93
	Strength Score: Count the number of items rated as "2" and divide this number by 15 (the number of items in this section). Multiply by 100.	80

[Click here for Resources on Physical Activity in Schools](#)

Section 5. Wellness Promotion and Marketing

Rating







WPM1	Encourages staff to model healthy eating and physical activity behaviors.	1
WPM2	 Addresses strategies to support employee wellness.	1
WPM3	Addresses using physical activity as a reward.	2
WPM4	Addresses physical activity not being used as a punishment.	2
WPM5	Addresses physical activity not being withheld as a punishment.	1
WPM6	Specifies marketing to promote healthy food and beverage choices.	1
WPM7	 Restricts marketing on the school campus during the school day to only those foods and beverages that meet Smart Snacks standards.	2
WPM8	Specifically addresses marketing on school property and equipment (e.g., signs, scoreboards, sports equipment).	2
WPM9	Specifically addresses marketing on educational materials (e.g., curricula, textbooks, or other printed or electronic educational materials).	2

WPM10	Specifically addresses marketing where food is purchased (e.g., exteriors of vending machines, food and beverage cups and containers, food display racks, coolers, trash and recycling containers).	2
WPM11	Specifically addresses marketing in school publications and media (e.g., advertisements in school publications, school radio stations, in-school television, computer screen savers, school-sponsored Internet sites, and announcements on the public announcement (PA) system).	2
WPM12	Specifically addresses marketing through fundraisers and corporate-incentive programs (e.g., fundraising programs that encourage students and their families to sell, purchase, or consume products and corporate incentive programs that provide funds to schools in exchange for proof of purchases of company products, such as Box Tops for Education).	0
Subtotal for Section 5	Comprehensiveness Score: Count the number of items rated as "1" or "2" and divide this number by 12 (the number of items in this section). Multiply by 100. Do not count an item if the rating is "0."	92
	Strength Score: Count the number of items rated as "2" and divide this number by 12 (the number of items in this section). Multiply by 100.	58

[Click here for Wellness Promotion and Marketing Resources](#)

Section 6. Implementation, Evaluation & Communication

Rating

IEC1	Addresses the establishment of an ongoing district wellness committee.	2
IEC2	 Addresses how all relevant stakeholders (parents, students, representatives of the school food authority, teachers of physical education, school health professionals, the school board, school administrator, and the general public) will participate in the development, implementation, and periodic review and update of the local wellness policy.	1
IEC3	 Identifies the officials responsible for the implementation and compliance of the local wellness policy.	2
IEC4	 Addresses making the wellness policy available to the public.	2
IEC5	 Addresses the assessment of district implementation of the local wellness policy at least once every three years.	1
IEC6	 Triennial assessment results will be made available to the public and will include:	0
IEC7	 Addresses a plan for updating policy based on results of the triennial assessment.	0
IEC8	Addresses the establishment of an ongoing school building level wellness committee.	2
Subtotal for Section 6	Comprehensiveness Score: Count the number of items rated as "1" or "2" and divide this number by 8 (the number of items in this section). Multiply by 100. Do not count an item if the rating is "0."	75
	Strength Score: Count the number of items rated as "2" and divide this number by 8 (the number of items in this section). Multiply by 100.	50

[Click here for Resources for Wellness Policy Development, Implementation and Evaluation](#)

Overall District Policy Score

Total Comprehensiveness Add the comprehensiveness scores for each of the six sections above and divide this number by 6.	District Score 91
Total Strength Add the strength scores for each of the six sections above and divide this number by 6.	District Score 63



Federal Requirement



Farm to School



CSPAP

WellSAT: 3.0

Wellness School Assessment Tool

THE ASSESSMENT TOOL



Federal Requirement



Farm to School



CSPAP



NE1: Includes goals for nutrition education that are designed to promote student wellness.

Federal Rule language states that policies must include "specific goals for nutrition promotion and education, physical activity, and other school-based activities that promote student wellness."

0	Either no goals for nutrition education are mentioned or policy clearly detracts from requirement
1	Any of the following: <ul style="list-style-type: none"> Nutrition education goal is implied Policy only repeats the language of the federal wellness requirement regarding nutrition education Policy only mentions "total learning environment" language and no other NE-related language included Examples: <ul style="list-style-type: none"> "The district is committed to nutrition education" "Includes goals for nutrition education...designed to promote student wellness in a manner that the local education agency deems is appropriate" (and no other NE goals are stated) <p>"Enable students, through a comprehensive curriculum, to acquire the knowledge and skills necessary to make healthy lifestyle choices."</p>
2	Clear that there are specific goals for nutrition education. Example: "Nutrition lessons are integrated into the curriculum and the health education program."

NE2: Nutrition education teaches skills that are behavior focused, interactive, and/or participatory.

0	Not mentioned
1	Nutrition education for development of behavioral skills is suggested. Specific skills are mentioned but none are required Skills based nutrition education is suggested outside the NE section of the policy Examples: <ul style="list-style-type: none"> All students should have the skills necessary to make nutritious food choices." "Students will receive nutrition education that fosters the adoption and maintenance of healthy eating behaviors."
2	Statement that skill-based nutrition education is required OR specific skills are identified and required (e.g., media awareness, menu planning, reading nutrition facts labels). Examples: <ul style="list-style-type: none"> "Nutrition education will incorporate lessons helping children acquire skills for reading food labels and menu planning." "Schools will provide nutrition education lessons that cover topics such as reading a Nutrition Facts label." "Nutrition education will provide the knowledge and skills necessary to promote health."

NE3: All elementary school students receive sequential and comprehensive nutrition education (mark as N/A if district does not have elementary schools).

0	Not mentioned
1	Suggested. It is unclear if all elementary school students will receive nutrition education Example: "Nutrition lessons will be designed for integration into the curriculum and the health education program."
2	Required. It is clear that all elementary students will receive sequential and comprehensive nutrition education Example: "Nutrition topics shall be integrated within the comprehensive health education curriculum and taught at every grade level (K-12)."

NE4: All middle school students receive sequential and comprehensive nutrition education (mark as N/A if district does not have middle schools).


0	Not mentioned
1	Suggested. It is unclear if all middle school students will receive nutrition education Example: "Nutrition lessons will be designed for integration into the curriculum and the health education program."


2	Required. It is clear that all middle school students will receive sequential and comprehensive nutrition education Example: "Nutrition topics shall be integrated within the comprehensive health education curriculum and taught at every grade level (K-12)."
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NE5: All high school students receive sequential and comprehensive nutrition education (mark as N/A if district does not have high schools).	
0	Not mentioned
1	Suggested. It is unclear if all high school students will receive nutrition education Example: "Nutrition lessons will be designed for integration into the curriculum and the health education program."
2	Required. It is clear that all high school students will receive sequential and comprehensive nutrition education Example: "Nutrition topics shall be integrated within the comprehensive health education curriculum and taught at every grade level (K-12)."

NE6: Nutrition education is integrated into other subjects beyond health education.	
0	Not mentioned
1	Vague and/or suggested Examples: <ul style="list-style-type: none"> "...will encourage teachers to integrate nutrition education into the broader curriculum." "Staff shall teach, encourage, and support healthy eating by students by providing nutrition education and engaging in nutrition promotion for all grade levels throughout the school day in a number of different instructional settings. Instruction shall be integrated and include information about nutrition, exercise, and/or healthy choices that..." "Instructional staff are encouraged to integrate nutritional themes into daily lessons when appropriate."
2	Requires that nutrition education be integrated into other subjects. Examples: <ul style="list-style-type: none"> "Nutrition education will be integrated into mathematics classes." "Nutrition education will be integrated into the broader curriculum, where appropriate." "Nutrition education is integrated into cooking lessons."

NE7: Links nutrition education with the food environment.	
0	Not mentioned
1	Vague and/or suggested Example: "The entire school environment, not just the classroom, shall be aligned with healthy school goals to positively influence a student's understanding, beliefs, and habits as they relate to good nutrition and regular physical activity."
2	Requires that nutrition education be integrated into the larger school environment in concrete ways Example: "The nutrition education program shall work with the school meal program to develop school gardens and use the cafeteria as a learning lab."

 NE8: Nutrition education addresses agriculture and the food system.	
0	Not mentioned
1	Vague and/or suggested Example: "School gardens and nutrition instruction are encouraged as part of the academic curriculum."
2	Statement that students will receive education about agriculture and the food system through specific activities Examples: <ul style="list-style-type: none"> "Each school will establish a garden club." "The nutrition education curriculum will use the school garden as a teaching tool." "Field trips: Children will have an opportunity to visit local farms where produce is purchased for school meals."

 SM1: Assures compliance with USDA nutrition standards for reimbursable school meals. Federal Rule language states that local educational agencies must set "standards and nutrition guidelines for all food and beverages sold to students during the school day" that "are consistent with	
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applicable requirements set forth under 210.10." Additionally, the WIC Reauthorization Act of 2004 states that all wellness policies must "provide an assurance that guidelines for reimbursable school meals shall not be less restrictive than regulations and guidance issued by the Secretary of Agriculture."

0	Not mentioned
1	Policy states that school meals will meet or are in compliance with USDA nutrition standards but does not link to or cite the nutrition standards Example: "...all foods sold/served on campus will meet USDA nutrition standards for school meals "
2	USDA standards are included in the policy or a working link to the USDA website is provided Example: "Meals served through the district's food services program shall comply with the National School Lunch and/or Breakfast standards for meal patterns, nutrient levels, and calorie requirements for the ages/grade levels served, as specified in 7 CFR 210.10 or 220.8, as applicable. (working links provided)"

SM2: Addresses access to the USDA School Breakfast Program.

0	Not mentioned
1	Encourages or suggests participation in the School Breakfast Program or addresses breakfast without mentioning SBP by name Examples: <ul style="list-style-type: none"> "The district shall make every effort to offer school breakfast." "The district shall operate under USDA regulations for National School Lunch and/or Breakfast Programs."
2	Includes language to institutionalize the School Breakfast Program (e.g., specific reference to USDA, School Breakfast Program or CFR Part 220). Example: "All schools will provide breakfast through the USDA School Breakfast Program."



SM3: District takes steps to protect the privacy of students who qualify for free or reduced priced meals. The National School Lunch Act puts restrictions on how much information can be shared from participants. The United States Department of Agriculture states "school food authorities must assure that a child's eligibility status is not disclosed at any point in the process of providing free or reduced-price meals, including notification of the availability of free or reduced-price benefits, certification and notification of eligibility, provision of meals in the cafeteria, and the point of service." N/A (district qualifies for community eligibility)

0	Not mentioned
1	Vague/suggested Example: "The district should take steps to ensure that students qualifying for free or reduced priced meals are not overtly identified in any way."
2	District has implemented plans to protect student privacy which include methods used (in addition to following relevant regulations) Example: "The cafeterias are cashless—all students, regardless of the type of payment they make for school meals, or the food being purchased (meal or a la carte) are given a code to enter at the cash register."

SM4: Addresses how to handle feeding children with unpaid meal balances without stigmatizing them.

0	Not mentioned
1	Suggests that students with unpaid balances should be given a nutritious meal, with efforts to reduce stigma Example: "Schools should avoid stigmatizing students who are unable to pay for their meal."
2	Requires that students with unpaid balances are given the regular reimbursable meal and not stigmatized Examples: <ul style="list-style-type: none"> "It is prohibited for students with unpaid balances to be shamed in any way, including by announcing their names, using hand stamps to identify them, making them use a different serving line, or sending home clearly marked notices that they have an unpaid balance." "Schools must serve students a reimbursable meal, regardless of whether the student has money to pay or owes money." "Schools will not throw away a student's meal because the student has an unpaid balance." "Schools will reach out to the family of a child with an unpaid balance to assess whether the child is eligible for free or reduced price meals."


SM5: Specifies how families are provided information about determining eligibility for free/reduced price meals.

0	Not mentioned
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1	Vague/suggested Example: "Parents should be informed that the application is available online and should be completed by..."
2	Clear procedure for providing information is in place Example: "Applications for free/reduced priced meals are sent home to all families at the beginning of the school year. The application is also available on the district website."

SM6: Specifies strategies to increase participation in school meal programs.	
0	Not mentioned
1	Mentions vague and/or suggested strategies Examples: <ul style="list-style-type: none"> • "School meals shall be made attractive to students by appealing to their taste preferences." • "To the extent possible, school and transportation schedules shall be designed to encourage participation in school meal programs."
2	Requires specific strategies, such as limiting access to competitive foods in the cafeteria, requiring that all high school students have a scheduled lunch period, prohibiting students from promotional mailings or events, use of Smarter Lunchroom strategies, altered bus schedules, student input on the menu, "Grab and Go" or Breakfast in the Classroom Examples: <ul style="list-style-type: none"> • "Students will have the opportunity to provide input on local, cultural, and ethnic favorites." • "Shall provide periodic food promotions to encourage taste testing of healthy new foods being introduced on the menu." • "Morning bus routes will be scheduled to allow students to arrive at school in time to eat breakfast." • "Tutoring, club or organizational meetings will not be scheduled during the lunch period unless students are allowed to purchase lunch to be consumed during meetings" • "The district shall use the USDA's Smarter Lunchroom tools and other resources available on the USDA website." • "The district discourages consumption of competitive foods in place of school meals by limiting competitive food choices during mealtimes in the cafeteria." • "Snack foods may not be purchased during meals."

SM7: Addresses the amount of "seat time" students have to eat school meals.	
0	Not mentioned
1	Vague and/or suggests a specific amount of time Examples: <ul style="list-style-type: none"> • "Schools are encouraged to permit all full-day students a daily lunch period of not less than 20 minutes." • "Personnel will schedule enough time so students do not have to spend too much time waiting in line." • "Schools are required to provide all full day students a daily lunch period of not less than 20 minutes." (not clear how much of that time is "seat time")
2	Requires meal periods to include at least 10 minutes of "seat time" for breakfast (if offered) and at least 20 minutes of "seat time" for lunch Example: "After obtaining food, students will have at least 20 minutes to eat lunch."

 SM8: Free drinking water is available during meals. Federal Rule language states that schools "must make potable water available to children at no charge in the place where lunches are served during the meal service, consistent with amendments made by section 203 of the HRFKA, and in the cafeteria during breakfast meal service."	
0	Not mentioned
1	Drinking water is available, but accessibility is unclear Example: "Drinking water is available in the cafeteria upon request." "Water should be available in the cafeteria."
2	Free drinking water is available for self-service in the cafeteria Examples: <ul style="list-style-type: none"> • "Water fountains or water filling stations are available in all cafeterias." • "Water jugs and cups will be present in the cafeteria and supervisory staff will allow students to access water throughout the meal period." • "Free water will be available in the cafeteria during meal times."

 SM9: Ensures annual training for food and nutrition services staff in accordance with USDA Professional Standards.

Training requirements include: new and current directors: 12 hours; new and current managers: 10 hours; new and current staff: 6 hours. Requirement information available at: <https://www.gpo.gov/fdsys/pkg/FR-2015-03-02/pdf/2015-04234.pdf>.

0	Not mentioned
1	Training suggested, but unclear if USDA requirement is met Examples: <ul style="list-style-type: none"> • "All food service personnel will have adequate training in food service operations." • "All food service personnel shall receive pre-service training in food service operations."
2	It is clear that USDA requirement for training and/or continuing education is being met. Examples: <ul style="list-style-type: none"> • "The USDA Professional Standards for State and Local Nutrition Programs are followed to ensure that professional development in the area of food and nutrition is provided for food service directors, managers and staff. New and current food service directors must have at least 12 hours; new and current managers must have at least 10 hours; new and current staff must have at least 6 hours" • "All school nutrition program directors, managers and staff will meet hiring and annual continuing education/training requirements in the USDA Professional Standards for Child Nutrition Professionals. These school nutrition personnel will refer to USDA's Professional Standards for School Nutrition Standards website to search for training that meets their learning needs."



SM10: Addresses purchasing local foods for the school meals program. Procurement is one of the three components of the farm to school program. Procurement is defined as local foods that are purchased, promoted, and served in the cafeteria or as a snack or taste-test. USDA farm to school program available at: <https://www.fns.usda.gov/farmtoschool/farm-school>

0	Not mentioned
1	Mentions vague and/or suggested strategies Examples: <ul style="list-style-type: none"> • "Schools are encouraged to make available locally grown produce available." • "Schools are encouraged to source fresh fruits and vegetables from local farmers where practicable."
2	Local foods will be purchased and promoted Examples: <ul style="list-style-type: none"> • "School meals will include fresh, locally-grown foods in school meals from farms engaged in sustainable practices whenever possible and these foods will be promoted in the cafeteria." • "Cafeteria will regularly provide taste tests for locally grown products."





NS1: Addresses compliance with USDA nutrition standards (commonly referred to as Smart Snacks) for all food and beverages sold to students during the school day. The school day begins at midnight the night before and goes until 30 minutes after the final bell. Federal Rule language states that policies must contain "standards and nutrition guidelines for all foods and beverages sold to students during the school day on each participating school campus under the jurisdiction of the local educational agency."

0	Not mentioned
1	Vague and/or suggested. Any of the following: <ul style="list-style-type: none"> • Specifies meeting nutrition standards for competitive foods, but does not show: specific standards that document compliance OR specify USDA Smart Snacks OR specify federal requirements. • Lists some, but not all standards/ implies partial compliance • Requires Smart Snacks for foods or beverages, but not both. Examples: <ul style="list-style-type: none"> • "All foods sold to students outside of school meals shall meet district nutrition standards" (district nutrition standards do not meet Smart Snacks) • "All beverages sold must meet Smart Snack nutrition standards."

2	<p>All foods and beverages sold to students during the school day are required to meet or are in compliance with USDA Smart Snacks federal nutrition standards or specific standards are named that imply compliance.</p> <p>Examples:</p> <ul style="list-style-type: none"> • "The district is in compliance with all federal and state nutrition standards for all foods served in schools." • "Guidelines from USDA's Final Rule: Nutrition Standards for All Food Sold in School standards apply to a la carte in the cafeteria, in-school stores, snack bars, vending machines, and any other venues where food or candy may be sold on school campuses during the school day, including fundraisers, beginning July 1, 2014"
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NS2: USDA Smart Snack standards are easily accessed in the policy.	
0	Not mentioned
1	<p>USDA Smart Snacks are mentioned without a link to the full regulation</p> <p>Example: "The District will follow the Smart Snacks in School standards for all food and beverages sold to students on school campus during the school day." (no link or full description of standards are provided)</p>
2	The complete Smart Snack standards are included in the policy or an active web link is provided

 <p>NS3: Regulates food and beverages sold in a la carte. If a policy requires that "all food sold" or "all food and beverages made available" meet Smart Snacks standards, or competitive foods are not allowed to be sold, NS3 should be coded as a 2.</p>	
0	Not mentioned or language such as "The district shall monitor all food and beverages sold or served to students, including those available outside of the federally regulated child nutrition programs". (i.e., a la carte, vending, student stores, rewards, fundraising, etc.)
1	<p>Recommended/limited to either of the following:</p> <ul style="list-style-type: none"> • A la carte regulations or umbrella statement regulating "all (competitive) foods" is vague, suggested, time- or location-specific, subject to principal's discretion, or weakened by other exceptions • A la carte nutrition standards are required, but do not meet the level of Smart Snacks <p>Examples:</p> <ul style="list-style-type: none"> • "Food service shall strive to include some healthy choices (choices listed) for all a la carte food sales." • "All foods and beverages sold must meet nutrition standards for fat, sugar, and calories. Only water, milk, and 100% juice may be sold." (requirements don't meet Smart Snacks)
2	<p>Requires either Smart Snacks or competitive food and beverage sales are banned during the school day (or just within the a la carte lines)</p> <p>Examples:</p> <ul style="list-style-type: none"> • "It is the policy of the School District that all foods and beverages sold to students during the school day on any property under the jurisdiction of the district will meet the U.S. Department of Agriculture (USDA) school meal and Smart Snacks in School (Smart Snacks) nutrition standards." • "All food items served or offered (for sale) to students during the school day (from the midnight prior, to 30 minutes after the end of the official school day) will meet all federal, state, and local standards for all nutrient and competitive food guidelines." • "The sale of F&B is limited to F&B sold through the school meal program." • "No competitive foods or beverages may be sold during the school day."

 <p>NS4: Regulates food and beverages sold in vending machines. If a policy requires that "all food sold" or "all food and beverages made available" meet Smart Snacks standards, or competitive foods are not allowed to be sold, NS4 should be coded as a 2.</p>	
0	Not mentioned or language such as "The district shall monitor all food and beverages sold or served to students, including those available outside of the federally regulated child nutrition programs." (i.e., a la carte, vending, student stores, rewards, fundraising, etc.)
1	<p>Recommended or limited to either of the following:</p> <ul style="list-style-type: none"> • Vending machine regulations or umbrella statement regulating "all (competitive) foods" is vague, suggested, time- or location- specific, subject to principal's discretion, or weakened by other exceptions • Vending machine nutrition standards are required, but do not meet the level of Smart Snacks

	<p>Examples:</p> <ul style="list-style-type: none"> • "Food service shall strive to include some healthy choices (choices listed) for all a la carte food sales." • "All foods and beverages sold must meet nutrition standards for fat, sugar, and calories. Only water, milk, and 100% juice may be sold." (requirements don't meet Smart Snacks)
2	<p>Requires either of the following:</p> <ul style="list-style-type: none"> • Smart Snacks • Competitive food and beverage sales are banned during the school day (or just vending machines) <p>Examples:</p> <ul style="list-style-type: none"> • "It is the policy of the School District that all foods and beverages sold to students during the school day on any property under the jurisdiction of the district will meet the U.S. Department of Agriculture (USDA) school meal and Smart Snacks in School (Smart Snacks) nutrition standards." • "All food items served or offered (for sale) to students during the school day (from the midnight prior, to 30 minutes after the end of the official school day) will meet all federal, state, and local standards for all nutrient and competitive food guidelines." • "All vending machines will be turned off during the school day." • "No competitive foods or beverages may be sold during the school day."



NS5: Regulates food and beverages sold in school stores. If a policy requires that "all food sold" or "all food and beverages made available" meet Smart Snacks standards, or competitive foods are not allowed to be sold, NS5 should be coded as a 2.

0	Not mentioned or language such as "The district shall monitor all food and beverages sold or served to students, including those available outside of the federally regulated child nutrition programs." (i.e., a la carte, vending, student stores, rewards, fundraising, etc.)
1	<p>Recommended or limited to either of the following:</p> <ul style="list-style-type: none"> • School store regulations or umbrella statement regulating "all (competitive) foods" is vague, suggested, time- or location-specific, subject to principal's discretion, or weakened by other exceptions • School store nutrition standards are required, but do not meet the level of Smart Snacks. <p>Examples:</p> <ul style="list-style-type: none"> • "Food service shall strive to include some healthy choices (choices listed) for all a la carte food sales." • "All foods and beverages sold must meet nutrition standards for fat, sugar, and calories. Only water, milk, and 100% juice may be sold." (requirements don't meet Smart Snacks)
2	<p>Requires either of the following Smart Snacks or competitive food and beverage sales are banned during the school day (or just within school stores)</p> <p>Examples:</p> <ul style="list-style-type: none"> • "It is the policy of the School District that all foods and beverages sold to students during the school day on any property under the jurisdiction of the district will meet the U.S. Department of Agriculture (USDA) school meal and Smart Snacks in School (Smart Snacks) nutrition standards." • "All food items served or offered (for sale) to students during the school day (from the midnight prior, to 30 minutes after the end of the official school day) will meet all federal, state, and local standards for all nutrient and competitive food guidelines." • "This district does not allow for the operation of school stores until 30 minutes after the end of the school day." • "No competitive foods or beverages may be sold during the school day."



NS6: Addresses fundraising with food to be consumed during the school day.

If a policy requires that "all food sold" or "all food and beverages made available" meet Smart Snacks standards, or competitive foods are not allowed to be sold, NS6 should be coded as a 2. Smart Snacks applies to food and beverages sold as fundraiser during the school day. State agencies may adopt a policy that allows for exemptions to this requirement for infrequent school-sponsored fundraisers. The next variable (NS7) will capture whether or not those exemptions apply. Please indicate whether your district's nutrition standards apply to fundraising with food to be consumed during the school day here.

0	Not mentioned or language such as "The district shall monitor all food and beverages sold or served to students, including those available outside of the federally regulated child nutrition programs. (i.e., a la carte, vending, student stores, rewards, fundraising, etc.)
1	Recommended or limited to either of the following:

	<ul style="list-style-type: none"> Fundraiser regulations or umbrella statement regulating "all (competitive) foods" is vague, suggested, time- or location-specific, subject to principal's discretion, or weakened by other exceptions Fundraiser nutrition standards are required, but do not meet the level of Smart Snacks. <p>Examples:</p> <ul style="list-style-type: none"> "Food service shall strive to include some healthy choices (choices listed) for all fundraisers." "All foods and beverages sold must meet nutrition standards for fat, sugar, and calories. Only water, milk, and 100% juice may be sold." (requirements don't meet Smart Snacks)
2	<p>Requires either Smart Snacks or competitive food and beverage sales are banned during the school day (or just fundraisers)</p> <p>Examples:</p> <ul style="list-style-type: none"> "It is the policy of the School District that all foods and beverages sold to students during the school day on any property under the jurisdiction of the district will meet the U.S. Department of Agriculture (USDA) school meal and Smart Snacks in School (Smart Snacks) nutrition standards." "All food items served or offered (for sale) to students during the school day (from the midnight prior, to 30 minutes after the end of the official school day) will meet all federal, state, and local standards for all nutrient and competitive food guidelines." "There will be no food-related fundraisers held during the school day." "No competitive foods or beverages may be sold during the school day."


NS7: Exemptions for infrequent school-sponsored fundraisers.

Under Smart Snacks, your state may have adopted an exemption policy that allows for a certain number of infrequent school-sponsored fundraisers during which foods and beverages sold do not have to meet Smart Snacks. If your state allows exemptions, it provides the maximum number of exempt fundraisers allowed. However, your school district may have adopted language that limits this number even further, or prohibits exempt fundraisers all together.

0	Not mentioned
1	<p>Some number of exemptions for infrequent fundraisers are allowed during which foods and beverages sold do not have to meet the Smart Snacks nutrition standards.</p> <p>Example: Smart Snacks nutrition standards apply to all foods and beverages sold to students through district-sponsored fundraisers, unless an exemption applies. Each school will be allowed to hold 3 exempt fundraisers per school year during which any food or beverages may be sold.</p>
2	<p>Zero fundraiser exemptions are allowed</p> <p>Example: All fundraisers held during the school day must meet Smart Snacks. There are no exemptions</p>

NS8: Addresses foods and beverages containing caffeine at the high school level. Use N/A if no high school in district. As of 2014, USDA Smart Snacks standards prohibit the sale of foods and beverages containing caffeine in elementary and middle schools. However, high schools are allowed to sell caffeinated beverages.

0	Not mentioned
1	<p>Recommends or suggests high schools not sell foods and/or beverages with caffeine.</p> <p>Example: "High school principals are encouraged to limit the sale of beverages with caffeine to high school students (e.g. coffee from the school store)."</p>
2	<p>Either of the following: Prohibits the sale of foods and/or beverages containing caffeine (with the exception of trace amounts of naturally occurring caffeine) at all grade levels, during the school day; or requires high schools to follow the stricter Smart Snack beverage standards for middle schools.</p> <p>Examples:</p> <ul style="list-style-type: none"> "USDA Smart Snack standards for beverages sold in elementary and middle schools shall also be applied in high schools." "Beverages containing caffeine will not be sold on the high school campus." "Only water, milk, and 100% juice shall be sold to students during the school day."

 **NS9: Regulates food and beverages served at class parties and other school celebrations in elementary schools. Use N/A if no elementary schools in district.**

0	Not mentioned OR the foods and beverages served are specifically exempted from any district nutrition standards.
1	<p>Any of the following:</p> <ul style="list-style-type: none"> Regulations for class parties are required but weakened (e.g., by allowing one traditional party food.)

	<ul style="list-style-type: none"> Provide a specific and restricted list of food items allowed to be served/distributed/available at class parties or at all times (e.g., limiting to fruits and whole grains). <p>Examples:</p> <ul style="list-style-type: none"> "The district shall provide parents with a list of allowable party foods that meet the Smart Snack standards. "The district will regulate all food and beverages served during classroom activities." "Classroom parties, celebrations, etc. shall be limited to one snack and one beverage from a list of Smart Snack allowable items."
2	<p>No food is served during class celebrations.</p> <p>Examples:</p> <ul style="list-style-type: none"> "Classroom celebrations will focus on activities, rather than food. No food will be served." "Due to concerns about food safety and food allergies, children will be recognized on their birthdays by being given special privileges, such as being line leader or teacher's helper for the day. No food will be brought into the classroom."

NS10: Addresses nutrition standards for all foods and beverages served to students after the school day, including, before/after care on school grounds, clubs, and after school programming.

0	Not mentioned or only mentions participate in a program (e.g., CACFP) without stating that program nutrition standards will be followed.
1	<p>Nutrition standards apply to before/aftercare, but they are weaker than CACFP or Smart Snack standards.</p> <p>Example: "Only healthy snacks will be served to students in after school programs."</p>
2	<p>Requires that foods and beverages served to students in before/aftercare, whether run by the school or an outside party (e.g., YMCA) will meet CACFP nutrition standards OR Smart Snacks standards. Policy may state that one of these specific nutrition standards are followed, or may list the specific standards, providing evidence that they are followed.</p> <p>Example: "Snacks in aftercare are served via the Child and Adult Care Food Program and meet the requirements of that program."</p>

NS11: Addresses nutrition standards for all foods and beverages sold to students after the school day, including before/after care on school grounds, clubs, and after school programming.

0	Not mentioned
1	<p>Nutrition standards apply to extended day, but they are weaker than Smart Snack standards.</p> <p>Examples:</p> <ul style="list-style-type: none"> "Only healthy snacks will be sold to children participating in on-site programs after school ends." "Snacks sold to students during after school programs must be less than 200 calories and be low in sugar and sodium."
2	<p>Requires that foods sold during the extended school day meet or exceed Smart Snacks nutrition standards. Policy must either state that Smart Snacks or federal nutrition standards are used OR document compliance by providing a list of the nutrition standards.</p> <p>Examples:</p> <ul style="list-style-type: none"> "Snacks sold to children participating in on-site programs after school ends will meet USDA Smart Snack nutrition standards." "All snacks sold to students during after school programs will meet the same nutrition standards as foods sold during the school day."

NS12: Addresses food not being used as a reward.

0	Not mentioned OR only allows healthy food to be used as a reward.
1	<p>Discourages food as a reward.</p> <p>Examples:</p> <ul style="list-style-type: none"> "...strongly discourage the use of food/beverages as a reward or punishment." "...will encourage non-food alternatives as rewards." "Food should not be used as a reward."
2	<p>Prohibits food as a reward. Prohibition of food as a reward with the exception of Individual(ized) Academic Plans (IAP) or Individual(ized) Education Plans (IEP) still qualifies for a rating of "2."</p> <p>Examples:</p> <ul style="list-style-type: none"> "Food rewards or incentives shall not be used in classrooms to encourage student achievement or desirable behavior." "The use of food or candy as a classroom reward in any school is prohibited." "Schools will not use food or beverages as rewards for academic, classroom, or sports performances."

NS13: Addresses availability of free drinking water throughout the school day.

0	Not mentioned or only mentions water availability where meals are served.
1	Availability of free water is suggested or encouraged. Examples: <ul style="list-style-type: none"> • "Water should be accessible during hours of school operation through choices such as drinking fountains or vending machines." • "Schools are encouraged to provide drinking fountains throughout the school campus."
2	Free water is always available. Examples: <ul style="list-style-type: none"> • "Students and staff will have access to free, safe, and fresh drinking water throughout the school day." • "Drinking water fountains will be made available to students and staff throughout the school building." • "Students will be provided free access to drinking water throughout the school day." • "Students are allowed to bring in bottled water from home."



PEPA1: There is a written physical education curriculum for grades K-12.

0	Not mentioned
1	Vague and/or suggested Example: "Physical education will enable students to acquire the knowledge and skills necessary to maintain physical fitness, participate in physical activities and make healthy lifestyle choices."
2	Clear that school district has a written physical education curriculum for each grade K-12 (e.g., policy describes a comprehensive physical education curriculum- for "K-12," "all levels," or "all students"). Example: "The school district's comprehensive, standards-based physical education curriculum identifies the progression of skill development in grades K-12. Physical education curriculum revision will follow a formally established periodic review cycle congruent to other academic subjects."

PEPA2: The written physical education curriculum for each grade is aligned with national and/or state physical education standards.

0	Not mentioned
1	Vague and/or suggested Example: <ul style="list-style-type: none"> • "The physical education curriculum should follow existing standards."
2	Required. School district requires the written physical education curriculum to be aligned with state and/or national physical education standards Example: "The physical education curriculum for grades K-12 will be aligned with established state physical education standards."

PEPA3: Physical education promotes a physically active lifestyle.

0	Not mentioned
1	Any of the following: <ul style="list-style-type: none"> • Suggests that physical education promotes a physically active lifestyle • Suggests NASPE standards • Suggests that physical education programs focus on self-assessment Example: "Physical education programs should promote an active lifestyle"
2	Required. Any of the following: <ul style="list-style-type: none"> • Requires physical education to teach lifetime activities • Requires schools to follow NASPE standards • Focuses on self-assessment through a "Fitnessgram" or "Activity gram" Examples: <ul style="list-style-type: none"> • "Schools will provide physical education that fosters lifelong habits of physical activity." • "Physical education shall focus on personal fitness." • "Shall provide all students physical education that teaches them the skills needed for lifelong physical fitness."

PEPA4: Addresses time per week of physical education instruction for all elementary school students. Use N/A if no elementary schools in district.

0	Not mentioned
1	Vague and/or suggested OR requires less than 150 minutes/week of physical education. Examples: <ul style="list-style-type: none">• "Elementary schools should provide 150 minutes per week of physical education instruction."• "All students in grades one through eight are required to complete an average of one hundred instructional minutes per week of physical education."
2	Required. School district requires 150 minutes/week of physical education instruction for all elementary school students through the entire school year Example: "All elementary school students shall receive 150 minutes per week of physical education instruction throughout the school year."

PEPA5: Addresses time per week of physical education instruction for all middle school students. Use N/A if no middle schools in district.

0	Not mentioned
1	Vague and/or suggested OR requires less than 225 minutes/week of physical education Examples: <ul style="list-style-type: none">• "Middle schools should provide 225 minutes per week of physical education instruction."• "All students in grades one through eight are required to complete an average of one hundred instructional minutes per week of physical education."
2	Required. Clear that school district requires 225 minutes/week of physical education instruction for all middle school students through the entire school year Example: "All middle school students shall receive 225 minutes per week of physical education instruction throughout the school year."

PEPA6: Addresses time per week of physical education instruction for all high school students. Use N/A if no high schools in district.

0	Not mentioned
1	Vague and/or suggested OR requires less than 225 minutes/week of physical education Example: "High schools should provide 225 minutes per week of physical education instruction."
2	Required. Clear that school district requires 225 minutes/week of physical education instruction for all high school students through the entire school year. Example: "All high school students shall receive 225 minutes per week of physical education instruction throughout the school year."

PEPA7: Addresses qualifications for physical education teachers for grades K-12.

0	Not mentioned
1	Vague and/or suggested Example: "Physical education should be taught by a licensed teacher."
2	Required Example: "Physical education for grades K-12 is required to be taught by a certified/licensed teacher who is endorsed to teach physical education."

PEPA8: Addresses providing physical education training for physical education teachers.

0	Not mentioned
1	Vague and/or suggested


	Example: "All staff involved in physical education should be provided with opportunities for professional development."
2	Required. Clear that all physical education teachers are required to receive annual professional development specific to physical education/physical activity content Example: "The school district shall provide all physical education teachers with annual professional development opportunities that are focused on physical education/physical activity topics and competencies specifically for physical education teachers."

PEPA9: Addresses physical education exemption requirements for all students. An exemption is when students are permitted to not take PE because of enrollment in other courses such as math, science or vocational training. This does not include exemptions due to disability, religious or medical reasons.


0	Not mentioned
1	Vague and/or suggested: School district discourages exemptions from PE due to taking other courses or training. Examples: <ul style="list-style-type: none"> • "The school district discourages students from taking driver's education in place of required physical education." • "Unless otherwise exempted, all students will be required to engage in the District's physical education program."
2	Required. Clear that school district prohibits students from being exempt from PE for other courses or vocational training Example: "Schools may not allow students to be exempt for required physical education class time or credit."

PEPA10: Addresses physical education substitution for all students. A substitution is when students are permitted to not take PE because they are engaged in another physical activity such as JORTC or other school sports.

0	Not mentioned or allows exemptions Example: JROTC may be substituted for the 1/2 credit of PE required to graduate from high school."
1	Vague and/or suggested: School district discourages exemptions from PE due to taking other courses or training Example: "The school district discourages students from substituting other school or community activities for physical education class time or credit in place of required physical education."
2	Required. Clear that school district prohibits students from being exempt from PE for other school or community activities for physical education class time or credit. Example: "There will be no substitutions allowed for the physical education time requirement."

 PEPA11: Addresses family and community engagement in physical activity opportunities at all schools.


0	Not mentioned
1	Vague and/or suggested Example: "Physical activity opportunities should be provided at the school for families and community members."
2	Required. Example: "All schools are required to develop comprehensive school physical activity programs that address family and community engagement in physical activity, and provide a wide-variety of offerings."

 PEPA12: Addresses before and after school physical activity for all students including clubs, intramural, interscholastic opportunities.

0	Not mentioned
1	Vague and/or suggested Example: "Students should have the opportunity to be physically active before and after school."

2	<p>Required. Provision of physical activity classes, clubs, or interscholastic activities is required.</p> <p>Examples:</p> <ul style="list-style-type: none"> • "Schools shall provide physical activity opportunities for all students before and after school in all elementary, middle and high schools." • "Physical activity clubs and intramurals shall be available during before and after-school hours."
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PEPA13: Addresses recess for all elementary school students. Use N/A if no elementary schools in the district.	
0	Not mentioned
1	<p>Either of the following:</p> <ul style="list-style-type: none"> • School district suggests that recess be provided for all elementary school students. • School district requires recess without including a required amount of minutes each day. <p>Example: "Schools should provide students with opportunities for play when weather permits."</p>
2	<p>Required. Addresses at least 20 minutes of daily recess for all elementary school students</p> <p>Examples:</p> <ul style="list-style-type: none"> • "Schools shall provide at least 20 minutes of active daily recess to all elementary school students." • All schools are required to schedule 20 minutes of recess daily for every class in the school master schedule."


 PEPA14: Addresses physical activity breaks during school.	
0	Not mentioned
1	<p>Vague and/or suggested: School district suggests physical activity breaks.</p> <p>Example: "Teachers should provide students with physical activity breaks."</p>
2	<p>Required. School district requires that all K-12 school students be provided with daily physical activity breaks during the school day.</p> <p>Examples:</p> <ul style="list-style-type: none"> • "Each school shall provide at least one physical activity break for every 60 minutes of academic instruction daily." • "Schools must schedule a twenty minute mid-morning break each day to provide all students with physical activity opportunities."

PEPA15: Joint or shared-use agreements for physical activity participation at all schools.	
0	Not mentioned
1	<p>Vague or suggested: District encourages schools to enter into joint-use agreements for community use of school facilities and school use of community facilities for physical activity programming</p> <p>Example: "Schools should develop joint-use agreements in order to provide physical activity opportunities for community members at the school."</p>
2	<p>Required: District requires schools to enter into joint-use agreements for community use of school facilities and school use of community facilities for physical activity programming.</p> <p>Example: "All schools will develop joint-use agreements with community partners in order to provide expanded physical activity opportunities for all students and community members."</p>

PEPA16: District addresses active transport (Safe Routes to School) for all K-12 students who live within walkable/bikeable distance.	
0	Not mentioned
1	<p>Vague and/or suggested</p> <p>Example: "Schools should promote walking and biking to school."</p>
2	<p>Required. Clear that school district requires school to develop an active transport program.</p> <p>Example: "Each school shall partner with local government and community-based agencies to support active transport to school to implement a comprehensive active transport program (i.e. Safe Routes to School Program)."</p>

WPM1: Encourages staff to model healthy eating and physical activity behaviors.	
0	Not mentioned
1	<p>Either of the following:</p> <ul style="list-style-type: none"> • Suggests district or school administrators encourage staff to model healthy eating and physical activity behaviors • Encourages modeling healthy eating OR physical activity, but not both <p>Example: "Principals should encourage staff to model healthy eating habits"</p>
2	<p>Requires district or school administrators to encourage staff to model healthy eating AND physical activity behaviors</p> <p>Example: "School staff members shall be encouraged to model healthy eating and physical activity behaviors"</p>

 WPM2: Addresses strategies to support employee wellness.	
0	Not mentioned
1	<p>Suggests employee wellness activities</p> <p>Example: "The district desires to provide a comprehensive program promoting healthy eating and PA for district students and staff."</p>
2	<p>Specific strategies to support employee wellness are outlined</p> <p>Examples:</p> <ul style="list-style-type: none"> • "Health and wellness classes will be offered to staff." • "Activity programs will be available for staff." • "School physical activity equipment will be available for use by staff before or after school to support employee wellness." • "Free water and healthy snacks will be available in the staff break room." • "Each school is required to develop a comprehensive school physical activity program which allows staff to participate in or lead physical activity opportunities throughout the school day. In addition, an employee wellness program will be implemented in each building to meet the unique wellness needs of school staff."

 WPM3: Addresses using physical activity as a reward.	
0	Not mentioned
1	<p>Suggests that staff is encouraged to use extra physical activity when rewards are used</p> <p>Example: "Teachers may use non-food alternatives as rewards. For example, extra recess may be provided when time allows."</p>
2	<p>Staff is encouraged to use physical activity as a reward</p> <p>Example: "Food rewards are prohibited and teachers are provided with a list of alternative ideas. We strongly recommend staff use physical activity as a reward when feasible."</p>

WPM4: Addresses physical activity not being used as a punishment.	
0	Not mentioned
1	<p>Discourages using physical activity as a punishment.</p> <p>Example: "Teachers are discouraged from assigning physical activity as student punishment."</p>
2	<p>Prohibits using physical activity as a punishment.</p> <p>Examples:</p> <ul style="list-style-type: none"> • "Physical activity may not be assigned to students as a consequence of poor behavior or punishment for any reason. (Example: running laps or jogging around a playground)" • "Students shall not be required to engage in physical activity as punishment. For example, students may not be singled out to run extra laps, or perform other physical activities that the entire class is not engaged in, as a behavioral consequence."

WPM5: Addresses physical activity not being withheld as a punishment.

0	Not mentioned
1	Discourages withholding PA as a punishment Example: "The administration believes that recess and other opportunities for physical activity are an essential part of the school day. Teachers are encouraged to find alternatives to withholding recess or other physical activities as a punishment."
2	Prohibits withholding PA as a punishment Example: "Recess, PE or other physical activities will not be withheld from students as a punishment for poor behavior or incomplete class work."

WPM6: Specifies marketing to promote healthy food and beverage choices.

0	Not mentioned
1	Vague or suggested Example: "Marketing strategies, such as taste tests and signage in the cafeteria, should be used to promote healthy food and beverages throughout the school."
2	Required Example: "The healthiest choices, such as salads and fruit, will be prominently displayed in the cafeterias to encourage students to make healthy choices."



WPM7: Restricts marketing on the school campus during the school day to only those foods and beverages that meet Smart Snacks standards.

School marketing includes food and beverage advertising and other marketing, such as the name or depiction of products, brands, logos, trade marks, or spokespersons or characters, on any property or facility owned or leased by the school district or school (such as school buildings and campus, outside and areas adjacent to school buildings, athletic fields, school buses, parking lots, or other facilities) and used at any time for school-related activities. Federal Rule language states that schools may only "permit marketing on the school campus during the school day of those foods and beverages that meet the nutrition standards under 210.11 and promote student health and reduce childhood obesity."

0	Not mentioned
1	Vague or suggested or restricts marketing to district nutrition standards that do not rise to the level of Smart Snacks Examples: <ul style="list-style-type: none"> "Food service providers should be sensitive to the nutrition environment when displaying logos/trademarks on school grounds." "Marketing on the school campus will be limited to those products that are allowed to be sold according to the district's nutrition standards." (district nutrition standards do not meet Smart Snacks)
2	Restricts marketing of foods and beverages on the school campus, during the school day to those items that meet Smart Snacks Examples: <ul style="list-style-type: none"> "School-based marketing shall be consistent with Smart Snacks nutrition standards." "Marketing on the school campus will be limited to those products that are allowed to be sold according to the district's nutrition standards." (district nutrition standards require Smart Snacks)

WPM8: Specifically addresses marketing on school property (e.g., signs, scoreboards, sports equipment).

0	Not mentioned
1	Restrictions are vague, suggested or weakened by exceptions such as time, location, or a principal's discretion. Example: "Display and advertising of unhealthful foods is strongly discouraged on school grounds."
2	Prohibits ALL advertising of food and beverages that cannot be sold during the school day/do not meet Smart Snack nutrition standards and specifically prohibits this advertising on school property (signs, banners, scoreboards, etc.) or will prohibit at time of renewal of sponsorship agreements. Examples:

	<ul style="list-style-type: none"> • "Busses, building exteriors, score boards, etc. on and around school property shall be free of brands and illustrations of unhealthful foods" • "The advertising of foods and beverages that are not available for sale in district schools will not be advertised on any school property."
--	--

WPM9: Specifically addresses marketing on educational materials (e.g., curricula, textbooks, or other printed or electronic educational materials).	
0	Not mentioned
1	Restrictions are vague, suggested or weakened by exceptions Example: "A review of the advertising content of all classroom and online materials/websites used for teaching should be made prior to selection of materials. Use of materials depicting food brands or logos is discouraged."
2	Specifically ensures advertising of food and beverages will be considered in the selection of curricular/educational materials. Example: "Criteria for selecting educational materials for the classroom shall be expanded to include review of advertising content. Every effort will be made to select materials free of brand names/logos and illustrations of unhealthy foods."

WPM10: Specifically addresses marketing where food is purchased (e.g., exteriors of vending machines, food and beverage cups and containers, food display racks, coolers, trash and recycling containers, etc.).	
0	Not mentioned
1	Restrictions are suggested or weakened by exceptions such as time, location, or a principal's discretion Example: "An effort will be made to remove advertising from the cafeteria. Existing vending machines and coolers with logos will be replaced when possible."
2	Prohibits ALL advertising of food and beverages that cannot be sold at school/do not meet Smart Snack nutrition standards and specifically prohibits this advertising where food is purchased (food displays, vending machines, food and beverage containers and coolers). Example: "Advertising of any food or beverage that may not be sold on campus during the school day is prohibited. Advertising of any brand on containers used to serve food or in areas where food is purchased is prohibited."

WPM11: Specifically addresses marketing in school publications and media (e.g., advertisements in school publications, school radio stations, in-school television, computer screen savers, school-sponsored Internet sites, and announcements on the public announcement (PA) system).	
0	Not mentioned
1	Restrictions are vague/suggested or weakened by exceptions Example: "Schools will attempt to limit advertising of unhealthy products in school publications. All ads should be approved by the principal before being printed or included on the school website."
2	Prohibits ALL advertising of food and beverages that cannot be sold to students during the school day/ do not meet Smart Snack nutrition standards and specifically prohibits this advertising in school media. Example: "The district will not expose students to food marketing of any kind. All advertising in school publications and school media outlets must be approved by the principal."

WPM12: Specifically addresses marketing through fundraisers and corporate-sponsored programs (e.g., fundraising programs that encourage students and their families to sell, purchase, or consume products and corporate incentive programs that provide funds to schools in exchange for proof of purchases of company products, such as Box Tops for Education).	
0	Not mentioned
1	Restrictions are vague/suggested or weakened by exceptions such as time, location, or principal's discretion. Example: "It is recommended that schools avoid participation in fundraising or corporate incentive programs that promote a message inconsistent with our goals for a healthy school community."
2	Prohibits ALL advertising of food and beverages that cannot be sold to students during the school day/do not meet Smart Snack nutrition standards and specifically prohibits school participation in fundraising programs promoting brands or food and beverage companies.

Example: "Given concerns about student exposure to marketing, district schools will no longer participate in incentive programs that promote brands or provide children with free or discounted foods or beverages. PTA's will be asked to research new fundraising opportunities to replace programs such as McTeacher's night and Box Tops for Education."

IEC1: Addresses the establishment of an ongoing district wellness committee.

0	Not mentioned
1	Mentions a wellness committee, but it is unclear whether or not it is active Example: "The wellness committee met in September of 2012 to develop plans for policy implementation at the school level. School specific implementation plans can be found on each school's website."
2	Clearly states that the committee is ongoing and regular meetings occur Examples: <ul style="list-style-type: none"> • "The district wellness committee meets four times a year." • "The wellness committee meets quarterly throughout the school year."



IEC2: Addresses how all relevant stakeholders (parents, students, representatives of the school food authority, teachers of physical education, school health professionals, the school board, school administrator, and the general public) will participate in the development, implementation, and periodic review and update of the local wellness policy. Federal Rule language states that the policy must include "a description of the manner in which parents, students, representatives of the school food authority, teachers of physical education, school health professionals, the school board, school administrators, and the general public are provided an opportunity to participate in the development, implementation, and periodic review and update of the local school wellness policy."

0	Not mentioned
1	Recommends that membership is open to the community, or requires less than all listed stakeholders Example: "Students, parents, staff and/or community members are welcome to join the committee."
2	States a plan to actively recruit some or all of the following: Parents, students, PE teachers, school food authority representatives, school health professionals, school board members, administrators, members of the general public. Example: "A letter will be sent to the school community via email, and will be posted in a central area in all school buildings inviting members of the community to join the wellness committee. Parents, students, representatives of the school food authority, PE teachers, school health professionals, the school board, school administrators, and the general public will be included in the development, implementation, review and update of the wellness policy."




IEC3: Identifies the officials responsible for the implementation and compliance of the local wellness policy. Federal Rule language states that each local educational agency must "designate one or more local educational agency officials or school officials to ensure that each participating school complies with the local school wellness policy."


0	Not mentioned
1	It is suggested, but not required, that a district level official be responsible for monitoring school-level compliance Examples: <ul style="list-style-type: none"> • "School principals should periodically update the superintendent on school level compliance with the district wellness policy." • "A district and school contact will be designated with the responsibility to ensure that the schools meet this policy."
2	It is clear that a district level official (including the name and/or position of an individual) will be in charge of ensuring compliance at the building level. Examples: <ul style="list-style-type: none"> • "The assistant superintendent shall be responsible for ensuring that the wellness policy is implemented throughout district schools." • "The Superintendent or designee shall ensure compliance with established district wide nutrition and physical activity policies. In each school, the building administrator or designee shall ensure compliance."




IEC4: Addresses making the wellness policy available to the public. Federal Rule language states that local educational agencies must "inform the public about the content and implementation of the local school wellness policy, and make the policy and any updates to the policy available to the public on an annual basis."

0	Not mentioned
1	Vague and/or suggested The wellness policy is available upon request. Example: "The district will ensure school and community awareness of this policy by making it available by request."
2	Requires district to post its wellness policy on the website or distribute the wellness policy to the school and community on an annual basis at a minimum Example: "All public schools and public charter schools shall promote their local wellness policy to faculty, staff, parents, and students. A copy shall be posted on each school's website."

 IEC5: Addresses the assessment of district implementation of the local wellness policy at least once every three years. Federal Rule language states that local educational agencies must "at least once every three years, assess schools' compliance with the local school wellness policy, and make assessment results available to the public."	
0	Not mentioned
1	Either of the following: <ul style="list-style-type: none"> • It is suggested that policy implementation will be assessed • Implementation will be assessed, but less than triennially Example: "Representatives from each school should track compliance with the district SWP within their school."
2	Required. A specific plan to assess implementation Example: "The Advisory Council shall conduct a quantitative assessment of policy implementation every three years using the Wellness School Assessment Tool-Implementation (WellSAT-I) or the School Health Index.

 IEC6: Triennial assessment results will be made available to the public and will include: <ol style="list-style-type: none"> 1. The extent to which schools under the jurisdiction of the LEA are in compliance with the local school wellness policy; 2. The extent to which the LEA's local school wellness policy compares to model local school wellness policies; 3. A description of the progress made in attaining the goals of the local school wellness policy. 	
0	Not mentioned
1	Specifies inclusion of some, but not all, triennial progress report elements Example: "A triennial progress report with information about each school's wellness related activities will be shared with the entire school community."
2	Includes a statement making it clear that all three elements listed above will be included in the triennial progress report Example: "The triennial progress report will be posted on the district website. The report will include an assessment on compliance, the extent to which our wellness policy compares to model wellness policies, and progress made in achieving goals."

 IEC7: Addresses a plan for updating policy based on results of the triennial assessment. Federal Rule language states that districts must "make appropriate updates or modifications to the local school wellness policy, based on the triennial assessment."	
0	Not mentioned
1	Plans for updating policy are implied, but not certain, OR timing is unclear. Example: "The district wellness committee will revise the policy as needed"
2	Revisions /updates are required (or need for updates assessed) at specified intervals Example: "Every two-three years, the wellness committee will review the latest national recommendations pertaining to school health and will update the wellness policy accordingly."

IEC8: Addresses the establishment of an ongoing school building level wellness committee. This may also be called a school health team, school health advisory committee, or similar name.	
0	Not mentioned
1	Mentions a school level wellness committee, but it is unclear whether or not it is active Example:

WORKSHEET 4: SUMMARY OF FINDINGS

This worksheet can be used to create narrative descriptions to post alongside sections from **Worksheet 3: Identifying Connections between Policy and Practice**. The purpose of these narratives is to describe the district's progress toward meeting their wellness goals. Not all districts will have information to share in all four sections.



SECTION 1: STRONG POLICIES AND ALIGNED PRACTICES

Our district is fully compliant with federal requirements that regulate school meal nutrition standards as it pertains to compliance with USDA nutrition standards for reimbursable school meals.

Our district also is compliant in taking measures to protect the privacy our students in regards to eligibility for free and reduced price meals.

Our district policy also strongly addresses the written physical education curriculum for each grade as it is aligned with state physical education standards. The physical education department promotes a physically active lifestyle with students and staff.

Our district policy is compliant by including goals for nutrition education that are designed to promote student wellness by integrating nutrition education into other subjects beyond health education.



SECTION 2: CREATE PRACTICE IMPLEMENTATION PLAN

Through the process we were able to identify areas where our policy was lacking. We have determined that the underlying causes are predominately from the district not consistently implementing nutrition education within the primary grades and in the promotion of healthy food and beverage choices.

We will address this by reviewing core content standards to identify areas to that nutrition standards could be integrated in order to promote healthy living more frequently. Additionally, administration will create a student leadership team that will work with cafeteria staff in the development of the lunch menu. The cafeteria staff will also find more opportunities to promote healthy food such as offering samples of fresh fruit and vegetables more often.





SECTION 3: UPDATE POLICIES

We were able to identify through this evaluation there are a few policy items that are not part of our current written policy.

These include:

- Language that identifies goals for nutrition education that are designed to promote student wellness.
- Language that states that our district ensures the proper amount of annual training for food and nutrition service staff in accordance with the USDA's Professional Standards.
- Language that describes an evaluation plan and metrics for the triennial assessment.
- Language that includes a non-discrimination statement.



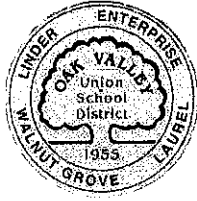
SECTION 4: OPPORTUNITIES FOR GROWTH

Overall our Local School Wellness Policy compared favorable to model policies as established in the WellSAT 3.0 metrics. There some areas where both our policy and our practices do not accurately detail polices that are both federally required or strongly suggested as best practices. An action will be developed to address the critical areas where we are not meeting federal requirements as well as any other applicable best practices from model polices. The Wellness Committee will review the following and work to complete the actions in the next year.

The following actions are needed in order to meet federal requirements:

1. The water fountain in the cafeteria needs to be repaired in order for students to have access to water during meals. Currently water bottles are provided.
2. Annual training for cafeteria staff in accordance with USDA Professional Standards.
3. The school site is monitoring food for classroom parties or celebrations but there needs to be additional communication to parents regarding the nutritional guidelines.
4. Include more parents in the development, implementation, and review of the wellness policy.
5. Continue with the triennial assessment of the wellness policy and make results available to the public.
6. Add a plan for updating the policy based on results of the triennial assessment to the wellness policy.
7. Include additional strategies to encourage employee wellness.

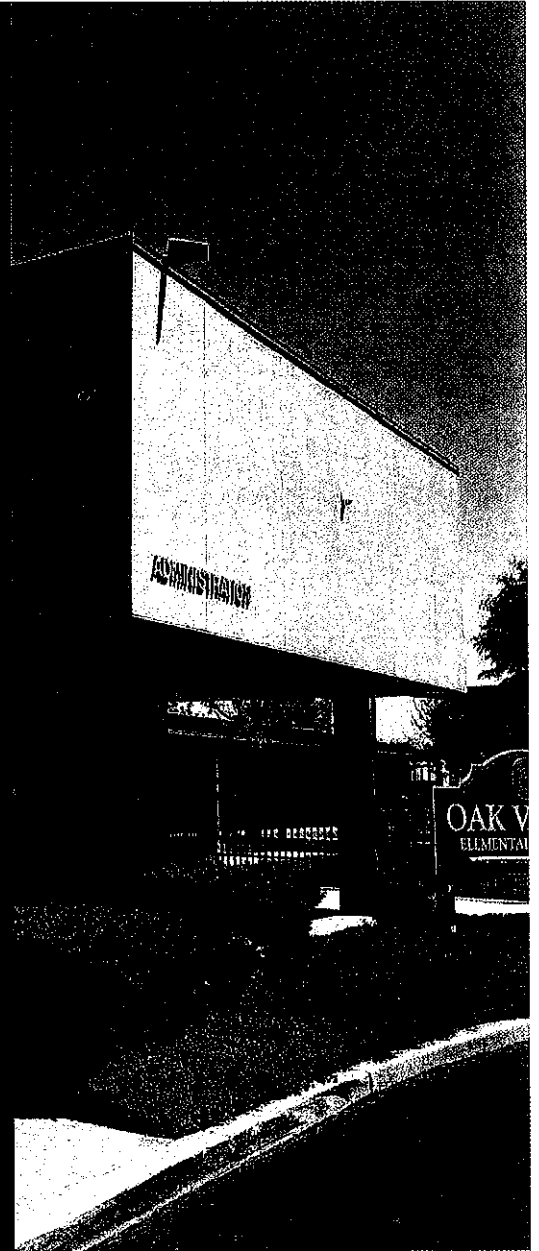
5.1.B



FACILITIES MASTER PLAN

OAK VALLEY UNION
SCHOOL DISTRICT

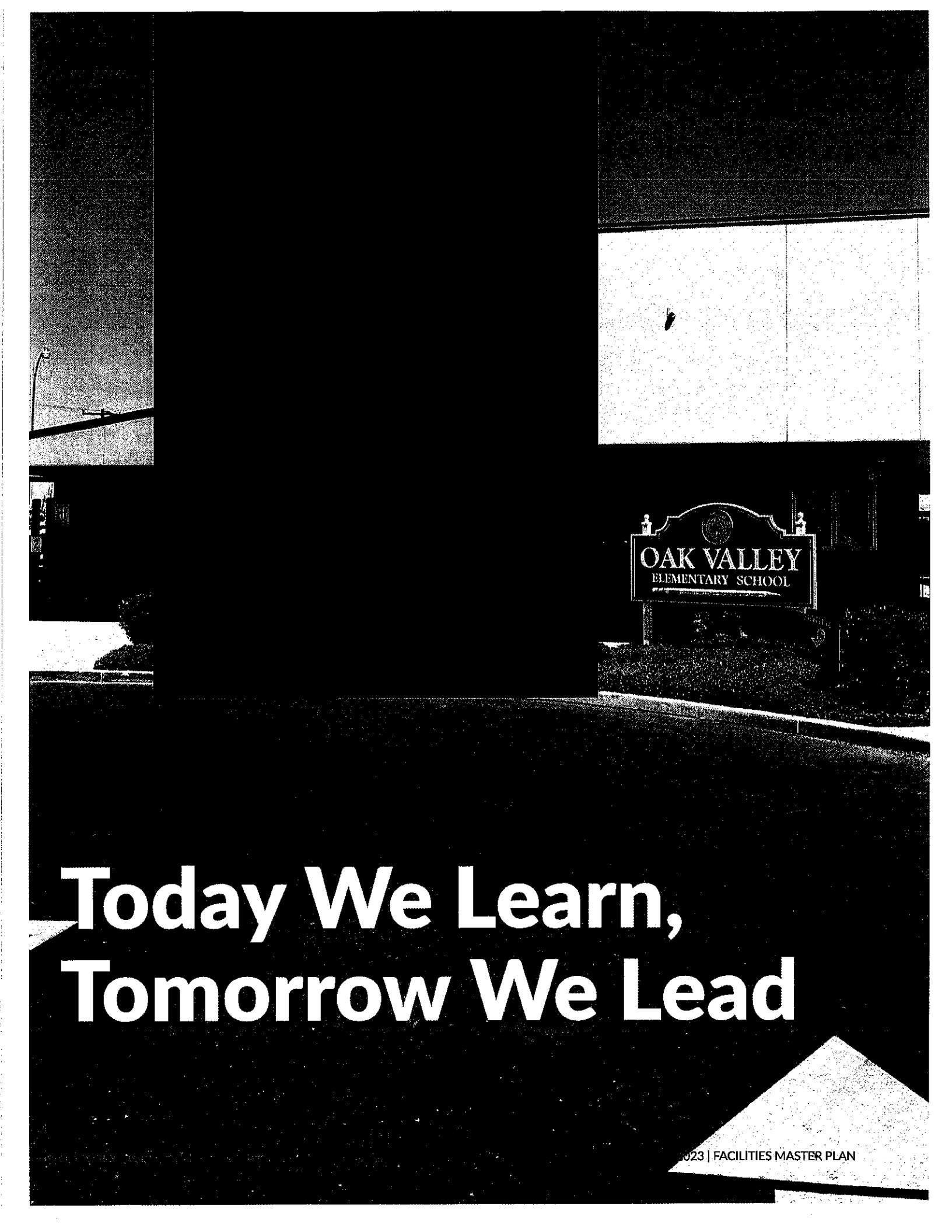
June, 2023



Prepared by:

SchoolWorks, Inc.

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www.schoolworksgis.com



Today We Learn, Tomorrow We Lead

OAK VALLEY UNION



The SchoolWorks, Inc., team would like to thank the Oak Valley Union School District for the opportunity to assist in the development of the 2023 Facilities Master Plan (FMP). We would also like to extend our gratitude to the Board of Education, administrators and staff for their contribution in the development of this document.

The SchoolWorks, Inc., FMP team consists of specialists in the fields of facilities planning, maintenance, operations, construction management, and financial planning. Our team was assisted by a collaboration of District administration, facilities, maintenance and operations staff, and other key stakeholders.

Board of Trustees

Doug Mederos, Board President
John Mendonca, Board Clerk
Joseph Meneses, Board Trustee
Mark Nunes, Board Trustee
Joey Benevedes, Board Trustee

Administration

Heather Pilgrim, Superintendent
Michelle Espinoza, Principal
Lionel Preciado, Maintenance Supervisor

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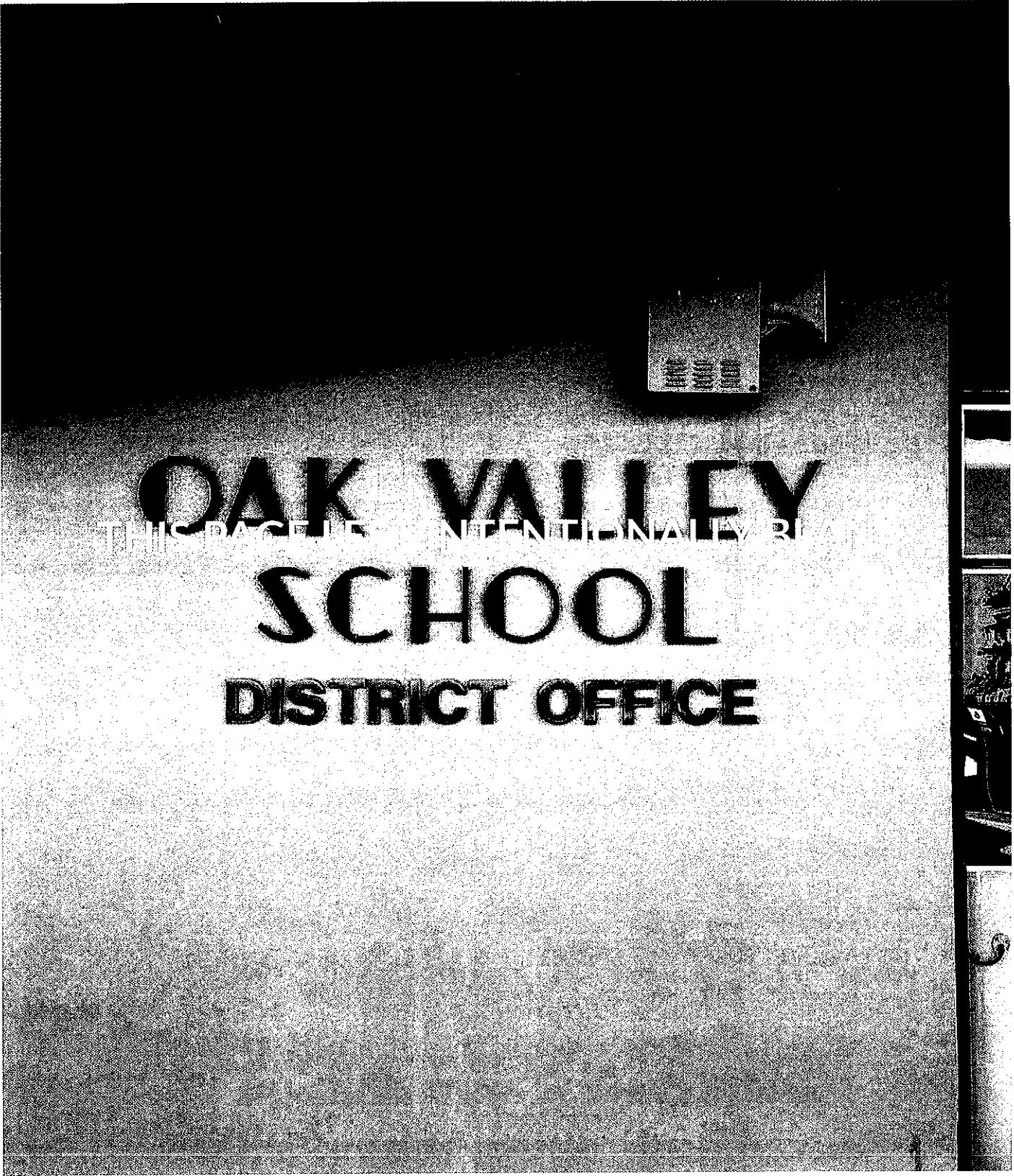


SECTION 4

SITE ASSESSMENTS

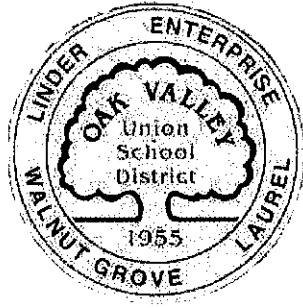
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OAK VALLEY
SCHOOL
DISTRICT OFFICE

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SECTION 1

EXECUTIVE SUMMARY

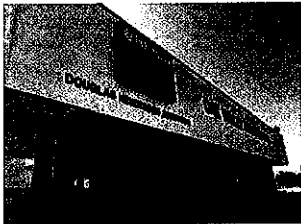
FACILITIES MASTER PLAN

Oak Valley Union
School District

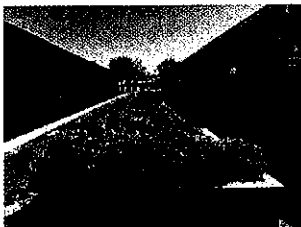
Mission Statement: Students will leave Oak Valley Union prepared for high school by meeting on-grade-level standards and having exposure to a well-rounded education that includes the Arts, Athletics, and Career Technical Education



Vision: Oak Valley Union provides learning for children in a welcoming, family-centered, and safe environment in order to instill high standards and positive character traits in students who in turn will create positive communities in which they live as adults.



Oak Valley Union is located in Tulare County, six miles northwest of the City of Tulare, the county seat. The District serves students attending Transitional Kindergarten (TK) through 8th grade and feeds into the Tulare Joint Union High School District.

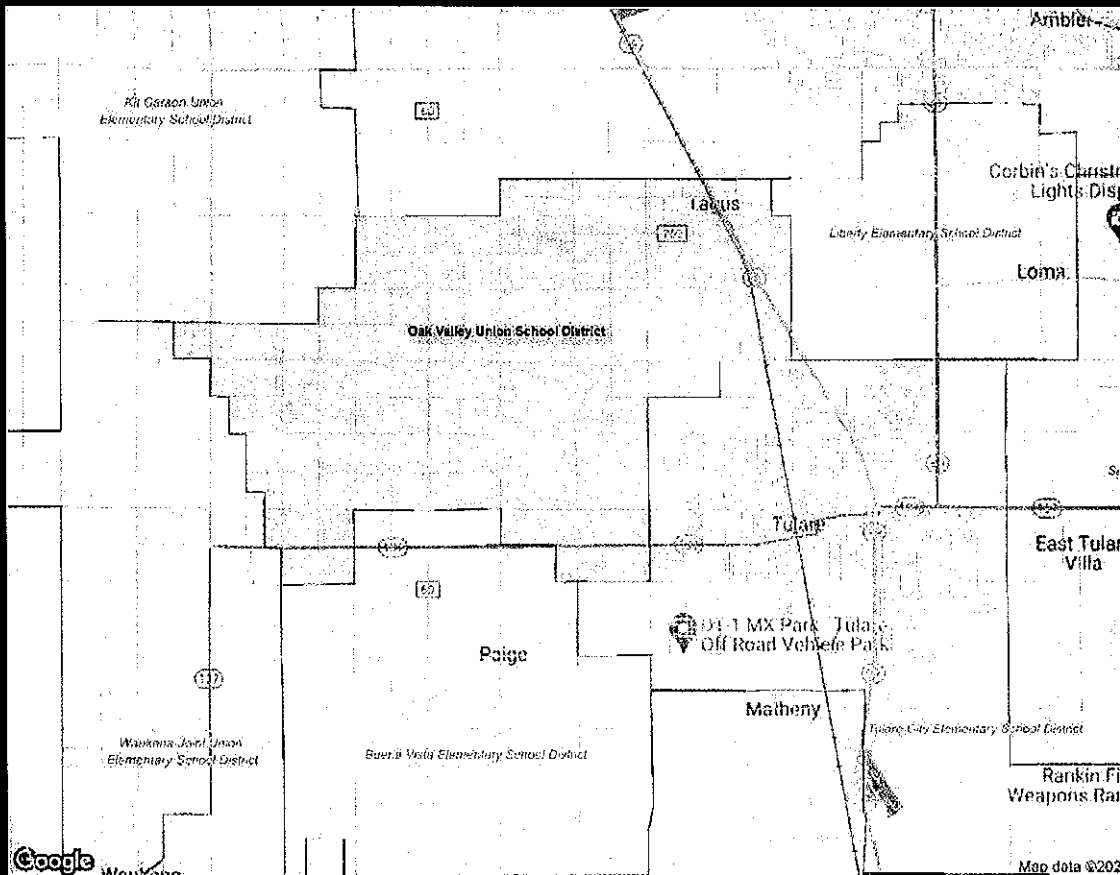
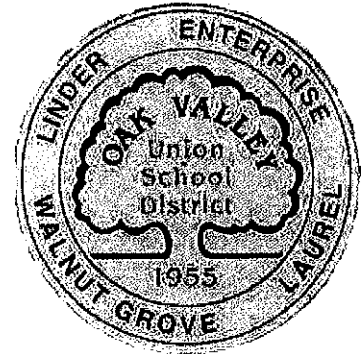


The Oak Valley Union school community, which includes a highly qualified staff, the Board of Trustees, students and parents, seek to provide all students with a quality individualized educational experience, steeped in a rich history of high standards and caring for the whole child. With an energetic focus on students' self-worth, providing new experiences, and preparation for success in high school. We are committed to graduating students who will make an impact in their community and their world.





Oak Valley Union
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 Tulare, CA 93274
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MAP



In March 2023, SchoolWorks, Inc., was retained by the Oak Valley Union School District to assist in the development of a comprehensive Facilities Master Plan (FMP). A successful FMP addresses the key building blocks that will establish a solid foundation for future goals and objectives. This approach focuses on developing a plan that identifies, defines, and prioritizes key maintenance, modernization, and new construction projects.

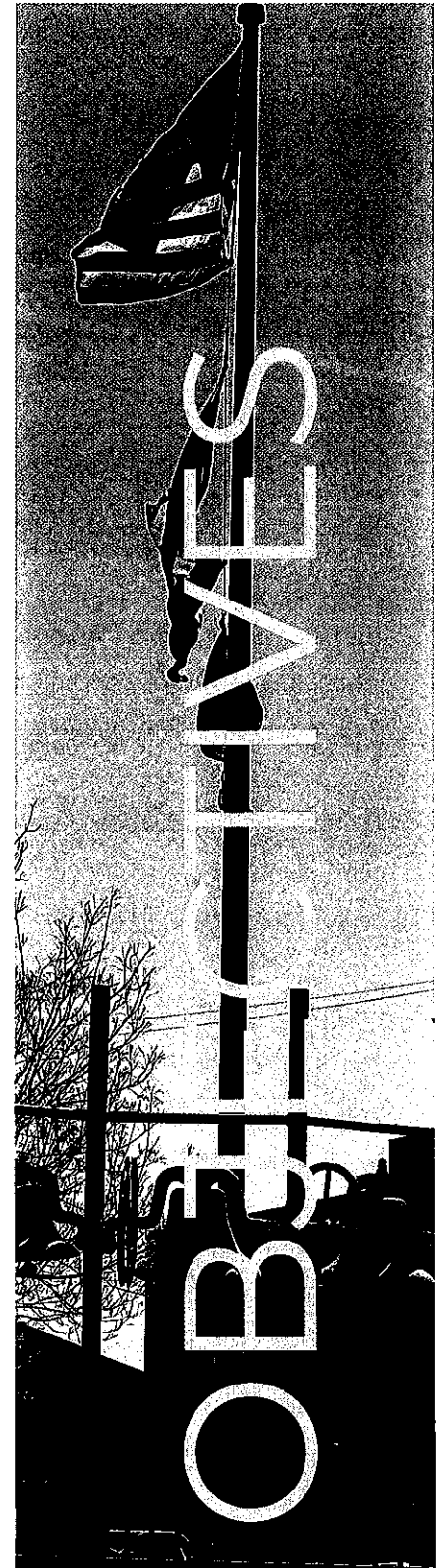
The FMP is a dynamic planning document with considerations given to ensuring facilities provide the best educational experience for students and staff while meeting the growing needs of the local community for the next three to five years. The FMP is also a living document that may require periodic updates. Certain components should be reviewed and re-evaluated by the District's guidance council on an annual basis.

One of the most common themes facing school districts today is the challenge of maintaining aging buildings and infrastructure while dealing with increased construction costs and limited funding resources. In some cases, the scope of work identified in the FMP will exceed the amount of available funding.

Through a collaborative effort with District stakeholders, the FMP will provide realistic and equitable guidelines that ensure long-term and short-term goals and objectives are met.

District administration and leadership should be recognized for their continued efforts to fund facility improvement projects by utilizing all available facility funding sources. Facilities, maintenance and operations staff should also be recognized for their continued efforts to develop and maintain a quality facilities improvement program.

- A Engage Stakeholders**
- The Facilities Master Plan (FMP) is successful only if the entire school community understands the planning process and has input into both the District's needs and proposed solutions to address those needs.
- B Comprehensive Facility Site Assessments**
- Address the key modernization projects necessary to extend the useful life cycle of critical building components and infrastructure. Formulate plans to replace aging portable classrooms and build any future new construction projects. Facilities across the District should provide equal opportunities for learning and not distract from those opportunities.
- C Maximize Funding Resources**
- Funding for facility projects is often limited. Develop a plan that utilizes all available funding resources, including the State School Facility Program (SFP), General Obligation Bonds, Developer Fees, and Deferred Maintenance accounts.
- D Future Enrollment Trends**
- Enrollment trends can have significant impact on how we operate facilities, house students, hire staff, and apply for State SFP funding. Therefore, it is important that enrollment is monitored on a yearly basis even after the FMP is completed.





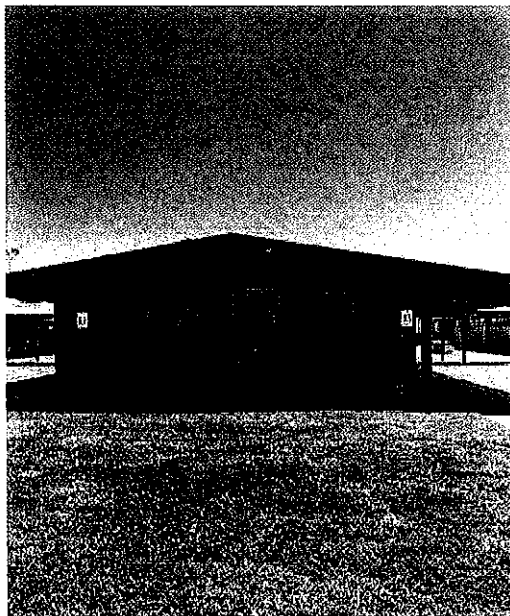
The Facilities Master Plan assessment focuses on the conditions of the main instructional campus of Oak Valley Elementary School. The scope of work and subsequent cost estimates are based on the comprehensive site assessment, stakeholder surveys and interviews, and the enrollment projection analysis.

The modernization scope of work category provides an overview of existing buildings and infrastructure. These are items identified as either needing repair or replacement because they are no longer functional, safe, or are in need of improvements that will result in extending the useful lifespan.

Facilities of high use, such as instructional spaces, libraries, athletic facilities and restrooms, often require additional interior upgrades that go beyond yearly maintenance. This is especially evident in facilities constructed or modernized over 25 years ago. In these cases, the FMP includes costs to modernize and refresh certain interior spaces. These costs can include upgrades to flooring, paint, casework, plumbing, and electrical to keep up with 21st Century technologies.

The future new construction category provides an overview of potential future new construction or expansion. This includes identifying new facilities to accommodate growth, technology, changes in educational specifications, or replacing existing facilities that can no longer provide a safe or functional educational experience.

The FMP has identified a total of **\$9,377,363** in potential future projects. This includes modernization of existing facilities and future new construction projects. The current solar project is not included in the scope of work. Cost estimates are based on 2023 construction rates in the local region and do not take into account inflation.



Site Systems

Utilities	\$172,250
Flatwork	\$185,900
Landscaping	-
Playgrounds	\$239,928
Playfields	\$1,040,000
Traffic Circulation & Parking	\$27,040
Security & Safety	-
ADA Compliance	\$65,000
Outdoor Facilities	\$44,200
Site Systems Total	\$1,774,318

Exterior Building Systems

Roofing	\$249,600
HVAC	\$130,000
Doors & Hardware	\$156,000
Exterior Lighting	-
Exterior Paint	\$214,110
Windows	\$424,320
Exterior Building Systems Total	\$1,174,030

Interior Building Systems

Interior Paint	\$84,500
Flooring	\$378,750
Interior Lighting & Electrical	\$314,015
Cabinets & Counters	\$507,000
Walls & Ceiling	\$338,000
Restrooms & Shower/Lockers	\$884,000
Interior Building Systems Total	\$2,506,265

Total Modernization	\$5,454,613
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New Additions

Bus Barn	\$110,500
New TK/K Classrooms	\$2,018,250
Middle School Classrooms	\$1,794,000
Total New Additions	\$3,922,750

Total Master Plan Projects	\$9,377,363
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Teachers and staff were asked to participate in an online survey regarding the conditions of school facilities. The questions focused on the current functionality of spaces found on campus.

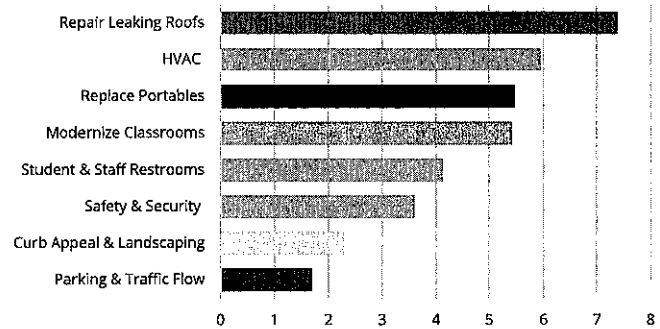
Each participant was asked to rank each category from 1 to 5 stars. 1 star indicates the poorest conditions requiring the greatest amount of work, and 5 stars indicates a facility in excellent condition.

After each ranking, teachers and staff were encouraged to provide write-in ideas or additional comments for improvements.

The average total score for Oak Valley Elementary was 3.7 stars. The facility with the highest average score was the library. The lowest average score was given to the special education classrooms and the restrooms.

According to teacher and staff, the categories or systems which need the most attention include repairing leaking roofs and HVAC. These were followed by replacement of aging portables and modernize existing classroom spaces.

Category Rankings

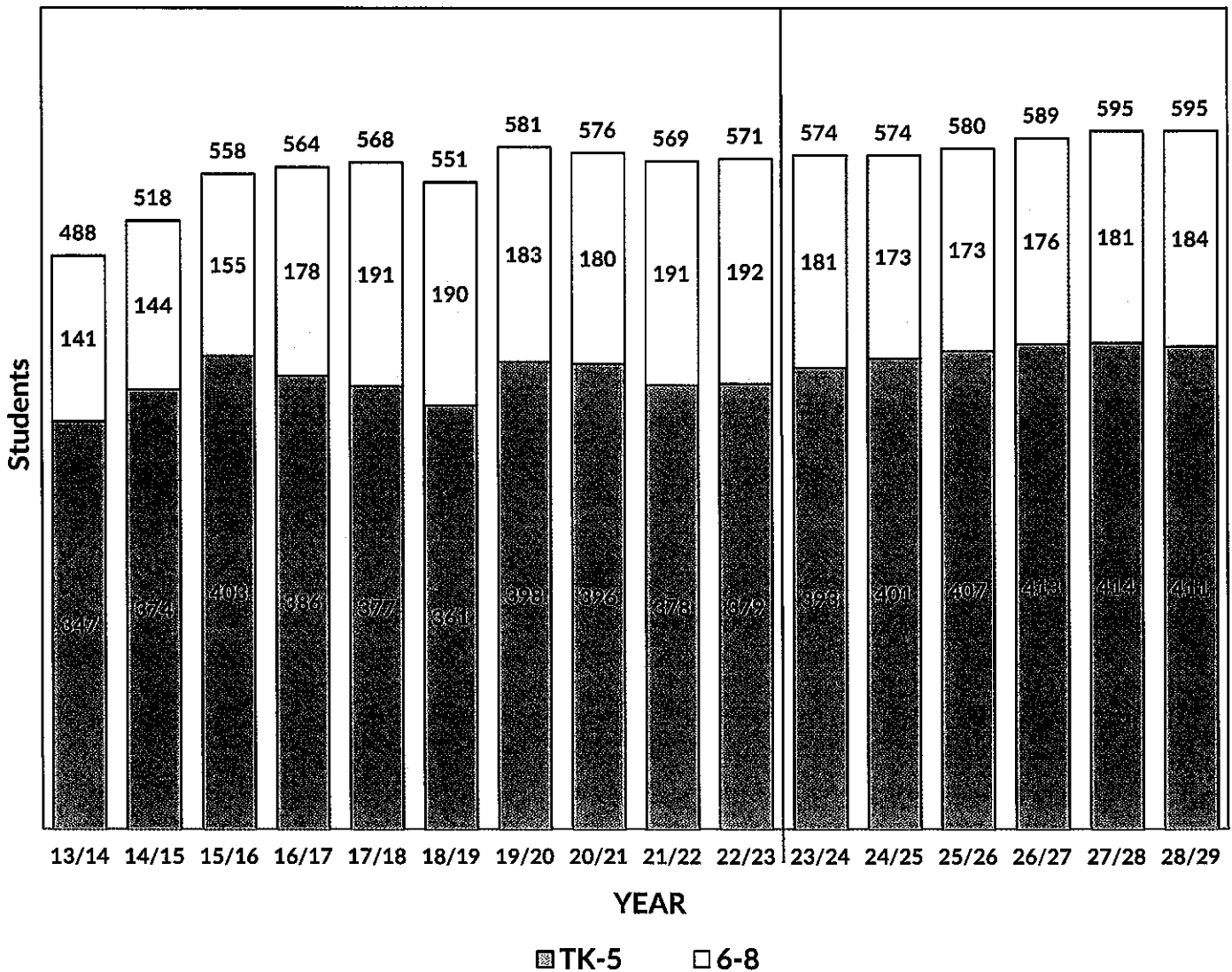


Library	★★★★★	4.5 ★
Kitchen/Food Services	★★★★★	4.1 ★
Multipurpose/Cafeteria	★★★★★	4.0 ★
Specialized Classrooms (Science, Music, Labs, Etc.)	★★★★★	4.0 ★
Outdoor Play Equipment, Hardcourts, Playfields	★★★★★	3.9 ★
Physical Education/Indoor Athletic Spaces	★★★★★	3.8 ★
Staff and Administrative Spaces	★★★★★	3.7 ★
Student Counseling Spaces	★★★★★	3.6 ★
General Education Classroom Spaces	★★★★★	3.4 ★
Restrooms	★★★★★	3.0 ★
Special Education Classrooms	★★★★★	3.0 ★
Total Score	★★★★★	3.7 ★



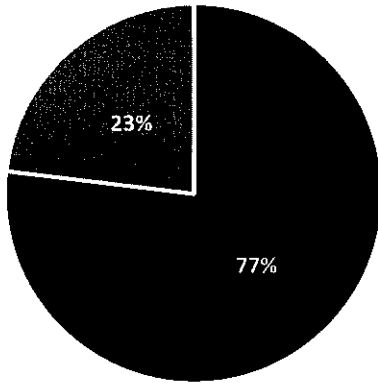
This graph shows a summary of the projections for the entire District. It shows the current enrollment for 2022/23, the historic enrollment for the past nine years, and the projected enrollment for the next six years. The end result is a total of 595 students in the District in 2028/29.

10 Year Enrollment History & 6 Year Enrollment Projection



Orange represents the historic and projected enrollment for the elementary school grades TK-5. Green represents the historic and projected enrollment for the middle school grades 6-8. The entire District enrollment is shown at the top of each bar.

CLASSROOMS BY BUILDING TYPE

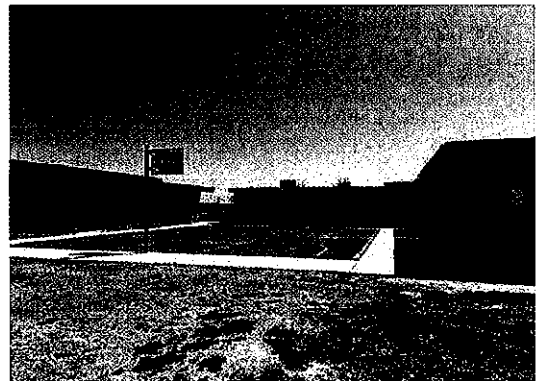


- Permanent Classrooms
- Portable Classrooms

The State School Facilities Program (SFP) considers all available teaching stations excluding physical education facilities and core facilities (e.g., libraries, multipurpose rooms, and administrative spaces) as part of the site capacity and classroom count.

Another method for calculating capacity and number of classrooms is based on local standards of class size and what is considered a full-day teaching station. The District may set aside classroom spaces defined by the SFP for specialized programs or pull-out spaces.

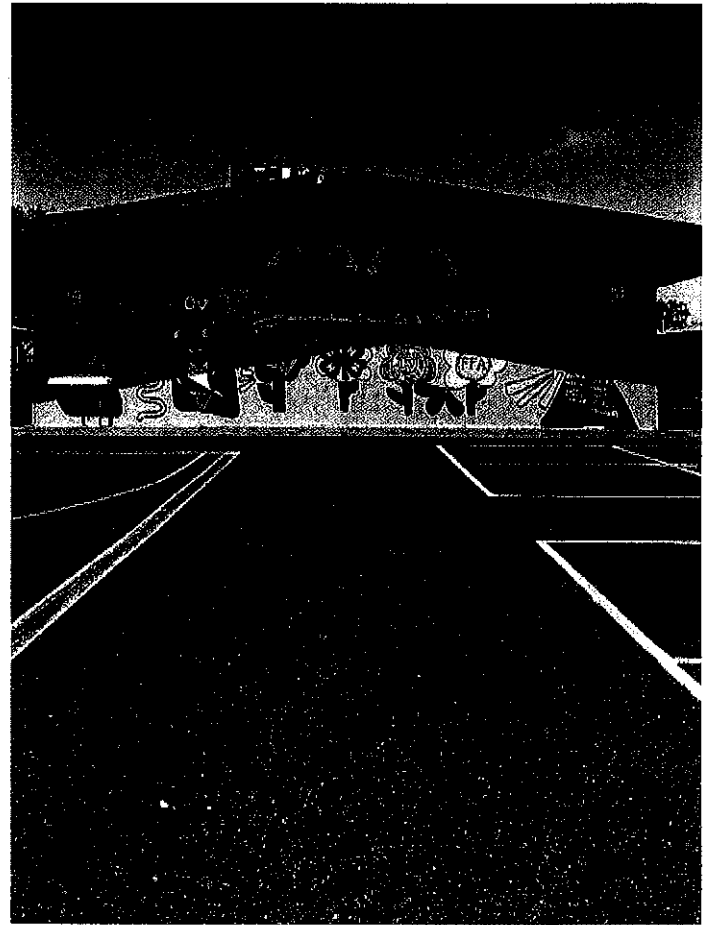
The District has a gross classroom count of 39 teaching stations. 23% of those classrooms are located in portable buildings. The District should be complimented for taking measures to reduce the number of portable classrooms over the years by replacing aging portables that have reached the end of their intended life cycle.



The capacity utilization chart below refers to the maximum number of students a campus can house based on the number of net classrooms identified by District administration as designated full-time teaching stations and the District loading standards.

This analysis is based off the net classroom count and may not take into consideration other rooms which could be used as full-time teaching stations but are needed for other programs offered by the District.

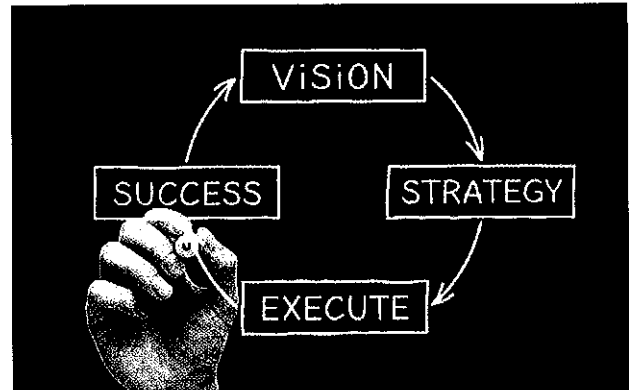
The following chart shows the current and projected utilization rates for Oak Valley Elementary School. The utilization indicates the long-term impacts of the changes in enrollment as compared to the school capacities.



Oak Valley Union	Classroom Inventory			Capacity	Enrollment Analysis		Utilization Analysis		District Loading Standards		
	Gross Count	Not Loaded	Net Count		Net Capacity	Current 2022	Projected 2028	Current 2022	Projected 2028	Grade	Loading Standard
Elementary Schools											
Oak Valley Union Elem	39	9	30	780	571	595	73.2%	76.3%	TK-K	24	
District Totals	39	9	30	780	571	595	73.2%	76.3%	1-3	24	
									4-5	28	
									6-8	28	

Based on the State definition of a classroom, Oak Valley Elementary School has a gross classroom count of 39 teaching stations. Nine of those classrooms are housed in portable buildings. Due to their age and functionality, those nine portable classrooms are not counted as part of the District defined net capacity.

The FMP has identified several key recommendations. Although the District has achieved many capital facilities projects over the last couple of decades, it is clear from the findings in this report that there is work still to be done. Unforeseen changes in priorities, unexpected failures of certain systems, and even new funding opportunities can have a significant impact on the suggested recommendations.



Prioritize Projects

The goal of this document is to provide administration and leadership with the appropriate documentation to build a sustainable and equitable list of priorities. These include short-term and long-term projects that are flexible and adaptable to unforeseen circumstances. Due to the shortfall in funding revenues, and the continued increased cost of construction, not all projects outlined in this document will be accomplished within the next three to five years. Therefore, it is recommended the District revisit key components that make up this document by updating the FMP accordingly.

Top priority projects identified in the scope of work include:

- 2 new TK/K classrooms with restrooms and playground
- Solar Project
- Repair leaking roofs
- HVAC (replace those units identified in this FMP)
- Modernize classrooms (including paint, flooring, casework, walls and interior lighting)
- Modernize restrooms
- Add future classrooms for middle school programs
- Remodel sports fields

State School Facility Program (SFP)

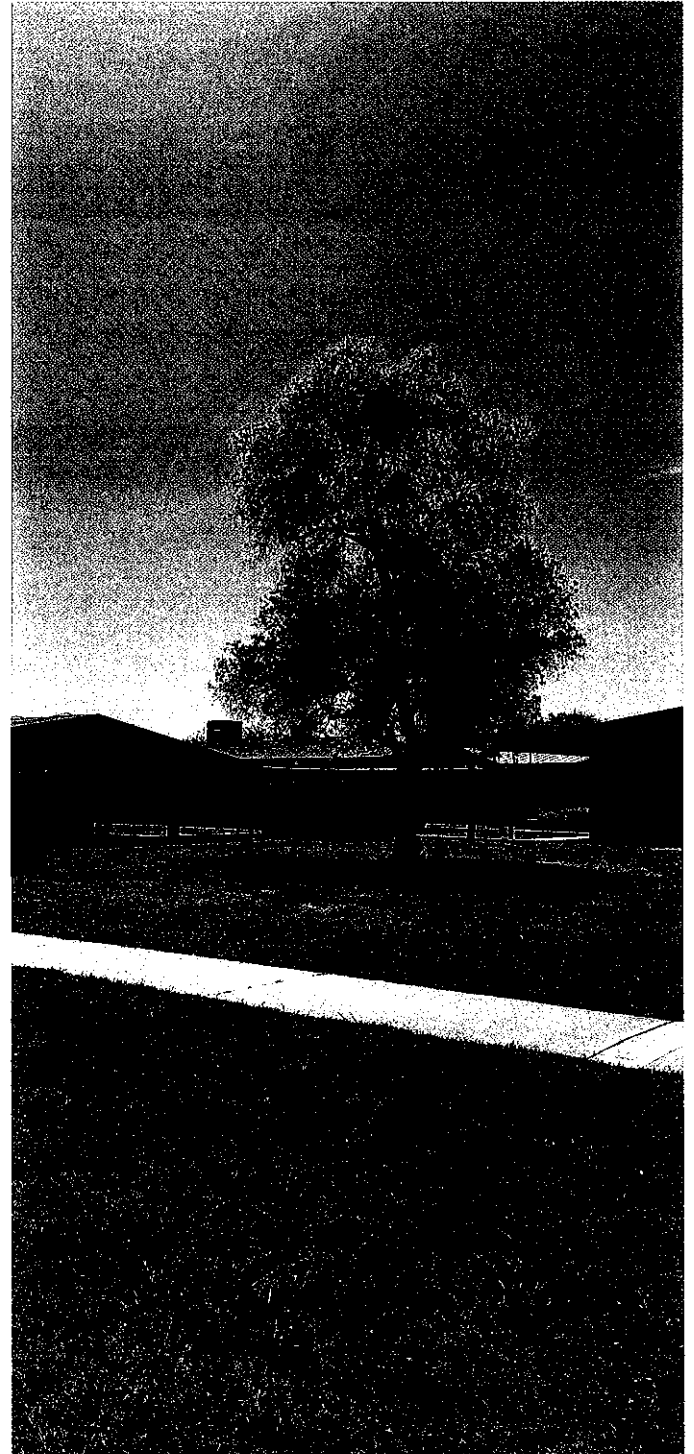
The District currently has several SFP applications pending. These projects include:

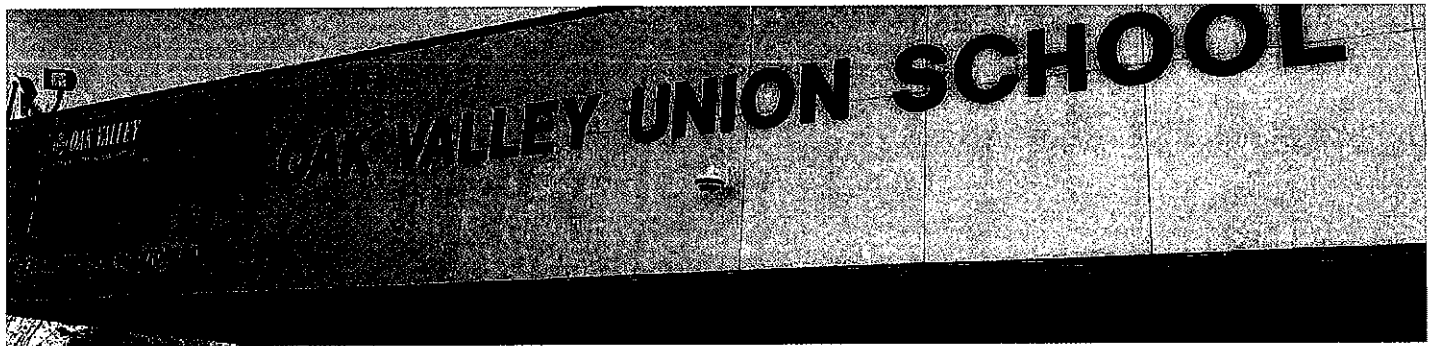
- New Construction application to build two (2) new TK classrooms **(\$1,951,807)**.
- Modernization application to update and modernize existing facilities and infrastructure **(\$2,172,433 original application plus \$2,123,646 additional eligibility)**

In total, the District should receive an estimated **\$6,247,886** in State funding. When comparing the estimated future funding revenue from the State, with the projects identified in the Facilities Master Plan, there is a shortfall of available funding. The FMP has identified a total of **\$9,812,863** in projects. Therefore, additional capital will be needed in order to complete the projects outlined in this report.

Deferred Maintenance Plan

The State of California does not provide funding to assist school districts with ongoing general facilities maintenance. All districts are responsible for setting aside dollars to pay for basic school maintenance and repairs. The FMP recommends the District establish an annual deferred maintenance plan to account for repairs. Per our recommendations from the Deferred Maintenance Pacing Guide, it is suggested that Oak Valley Union School District annually invest a minimum of **\$301,191** in its Deferred Maintenance budget.





The purpose of this phasing timeline is to outline a possible scenario involving the currently identified scope of work, potential funding resources, and estimated timelines. This plan is meant to serve as a guideline based off known information gathered during the Facilities Master Plan process. Unforeseen circumstances and changes are likely to occur. Therefore, this phasing plan should be reviewed on an annual basis.

YEAR	PROJECT	FUNDING
8/2023	FUNDING: Solar Project	California Energy Commission (CEC) Project Total: \$2,143,877
12/2023	FUNDING: Two (2) New TK/K Classrooms	State TK/K Program State Contribution: \$1,951,807 Local Contribution: \$41,885 Project Total: \$1,993,692
8/2024	COMPLETION: Solar Project	
8/2024	COMPLETION: Two (2) New TK/K Classrooms	
5/2025	FUNDING: Modernization Project	State Modernization State Contribution: \$4,296,079 Local Contribution: \$0 Project Total: \$4,296,079
8/2026	COMPLETION: Modernization Project	

YEAR	PROJECTS WITHOUT A CURRENT FUNDING SOURCE	FUNDING
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The following projects do not have a current funding resource. Other funding opportunities may be needed in order to complete the remaining projects outlined in the Facilities Master Plan.

TBD	Future Middle School classrooms to accommodate growth	TBD
TBD	Upgrade sports fields	TBD
TBD	Additional modernization not included in current plan	TBD

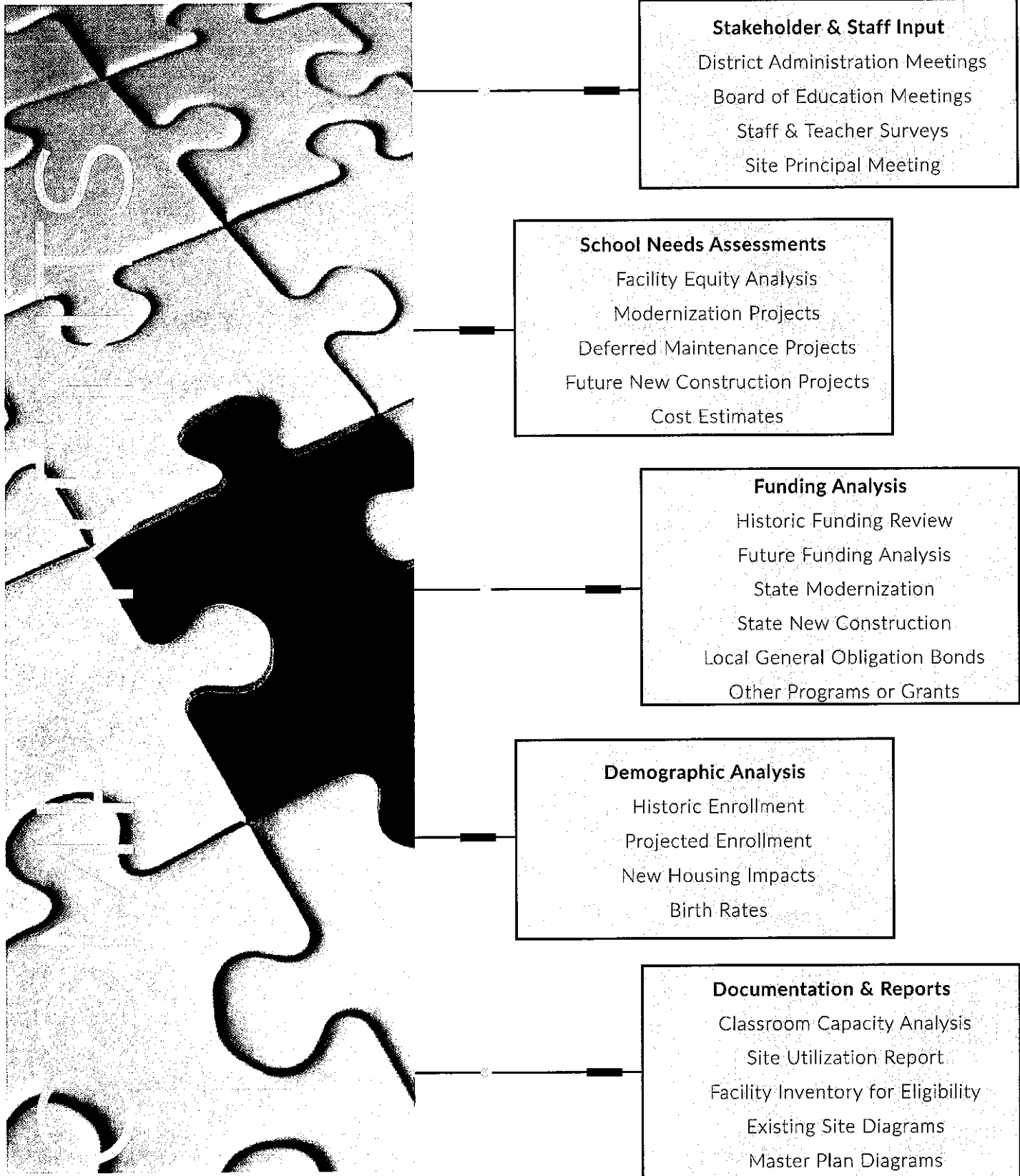


SECTION 2

PLANNING PROCESS

FACILITIES MASTER PLAN

Oak Valley Union
School District



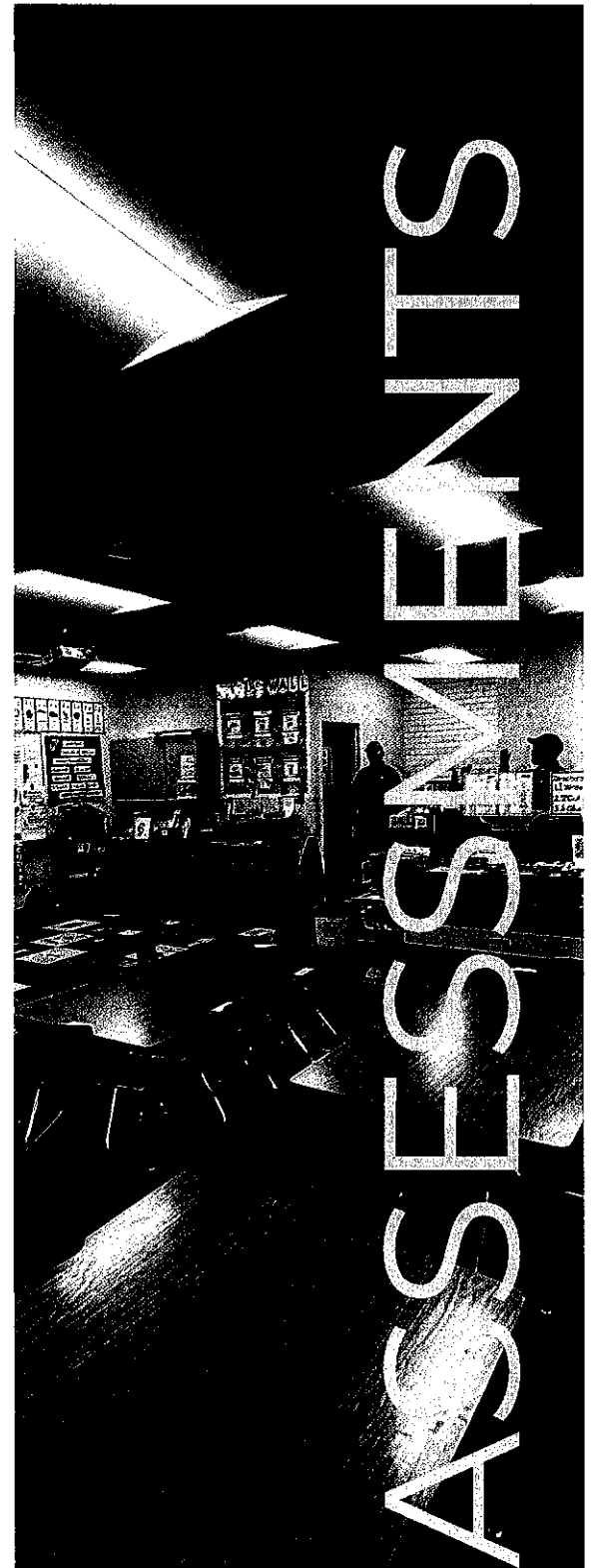
The site assessment is the foundation of the master plan process and is key in developing a priority list of projects that establish short- and long-term goals and objectives. It is especially important for planning budgets, obtaining funding, and creating both District and public awareness of overall facility conditions and needs.

Through a collaborative team effort, SchoolWorks, Inc., conducted a comprehensive needs assessment of the campus. We encouraged stakeholder participation, including site principal, maintenance, operations, facilities staff and other key stakeholders to join our team during our visits.

Walking the school site provided the team with a high-level opportunity to review past projects, identify age of facilities, and assess crucial infrastructure components such as HVAC, utilities, roofing, health, safety and security.

Oak Valley Elementary was also assessed on the ability of facilities to accommodate the educational and support programs. This involves determining which instructional spaces and support facilities (i.e., library, cafeteria, gym, office space) meet the minimum required area based on State and local District standards.

The new facilities assessment provides an overview of potential future new master-planned projects on campus. This includes identifying new facilities to accommodate growth, technology, changes in educational specifications, replacing existing facilities that can no longer provide a safe or functional experience for students and staff, or building facilities that are entirely absent from a campus altogether.





Cost estimates for projects in the Facilities Master Plan were identified using the current edition of Saylor's Construction Cost Estimating Guidelines, the system utilized by the State of California and the Office of Public School Construction for its cost guidelines.

These cost estimates were then modified through discussions with District staff and local construction contractors to reflect particular local conditions, such as a lack of qualified subcontractors in particular specialties, or the impact of State apprenticeship and prequalification requirements, which can affect construction pricing in a particular area. SchoolWorks, Inc., then produced a project cost matrix which covers costs for all identified proposed work.

The proposed cost estimates outlined in the plan are intended to be used as a guide to assist in developing a long-range plan. Certain unexpected or unforeseen scope of work variances could have a significant impact on costs. Estimate totals include both construction costs and various support costs.

Cost estimates for new facilities are based on a per-square-foot calculation and not on a particular design. It is recommended the District consult with the architect and project manager before finalizing any budgets.

Facilities Master Plan projects can be funded from several different resources. The State of California provides funding assistance to eligible public school districts through the School Facilities Program (SFP).

As facilities age and construction costs increase, it is important that the District develop a plan to utilize all available funding resources. In addition to State assistance, the District should implement a strong deferred maintenance plan and consult with its financial advisor to determine if certain local funding options, such as a General Obligation Bond measure, is a viable resource.

SchoolWorks, Inc., completed an in-depth review and analysis of how the District has historically funded facilities projects and identified future potential State and local funding resources. It should also be noted that as programs and regulations change, new resources may become available, such as the Federal CARES ACT and the School Energy Efficiency Stimulus Program.

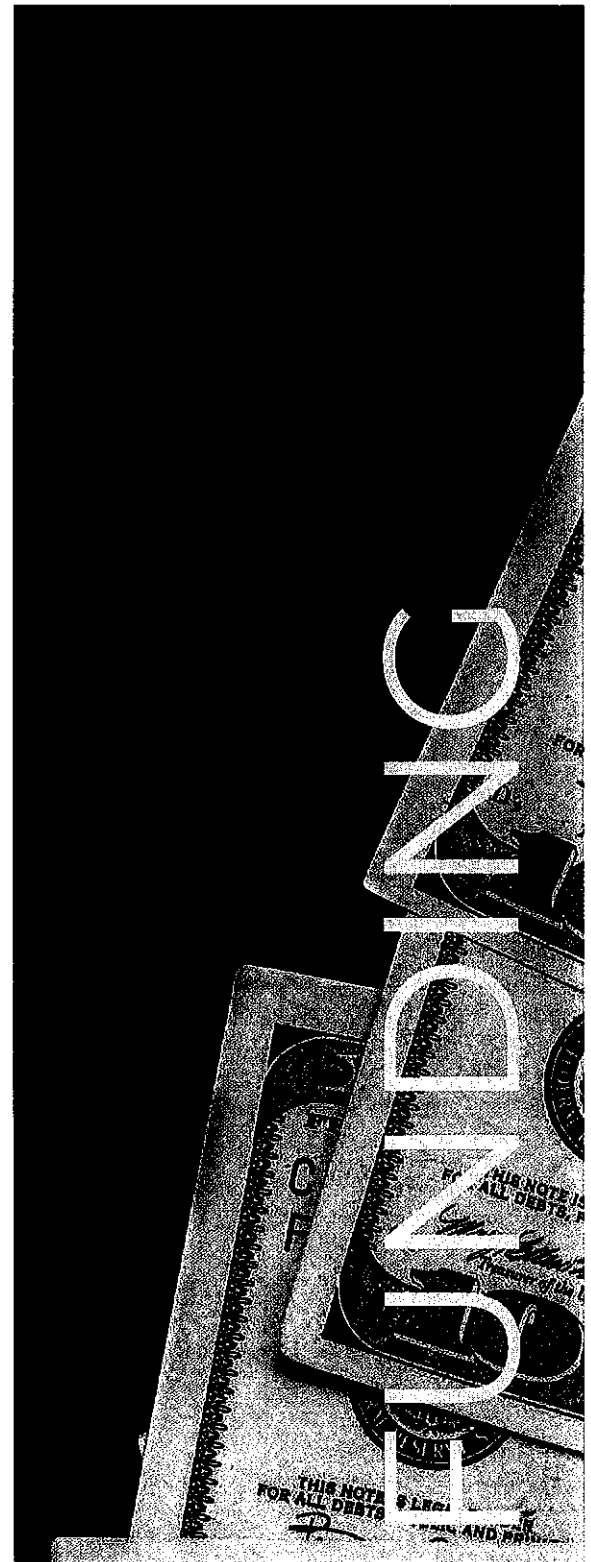
STATE FUNDING OPTIONS

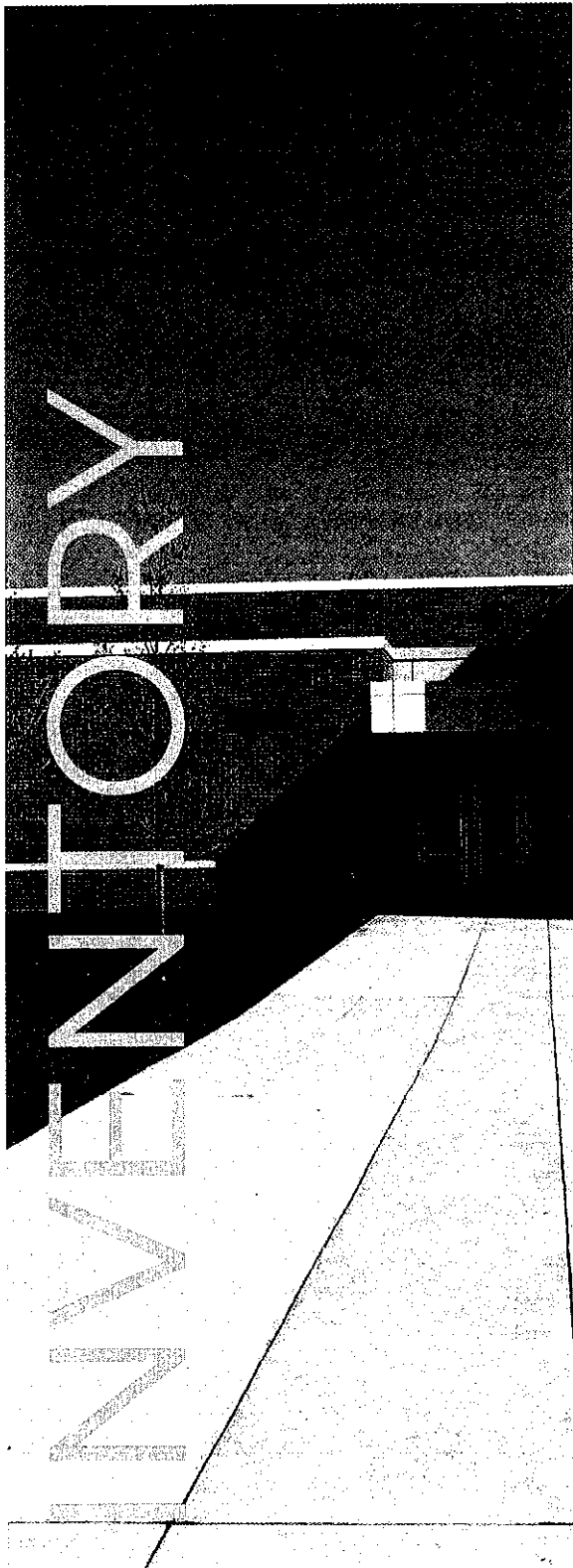
- Modernization Funding
- Full Day Kindergarten/Universal TK Funding
- New Construction Funding
- Financial Hardship Funding/Facility Hardship

LOCAL FUNDING OPTIONS

- Developer Fees
- Deferred Maintenance
- RRMA/RMA
- LCAP (Local Control and Accountability Plan)
- Certificates of Participation (COP)
- General Obligation Bonds (G.O. Bonds)

Some of these references may not be applicable to Oak Valley Union School District.





SchoolWorks, Inc., coordinated with staff to review all existing as-builts, blueprints and 1A diagrams. We then scanned this information into a digital library creating a valuable resource of inventory information. Our drafting team then created current computer aided design (CAD) diagrams which can be used for a multitude of different applications such as campus classroom maps and safety diagrams.

Once completed, the inventory provided a matrix identifying each building by construction type (permanent or portable), year built, interior square footage, roofline square footage, and number of State defined teaching stations.

This matrix can also provide valuable reporting information for State Modernization eligibility, deferred maintenance budgeting, and Facility Inspection Tool (FIT) reports.

Modernization eligibility is generated by the age of a building. Permanent building eligibility is generated for buildings over the age of 25 years or 25 years from the last State modernization funding for that building. Portable building eligibility is generated for buildings over the age of 20 years.

The demographic study provides a comprehensive enrollment analysis. The district-wide and school-specific enrollment projections are meant to serve as a planning tool to help with both long-term and short-term enrollment planning.

Demographic studies examine the factors that influence school enrollments, namely trends in demographics, birth rates, and new housing development.

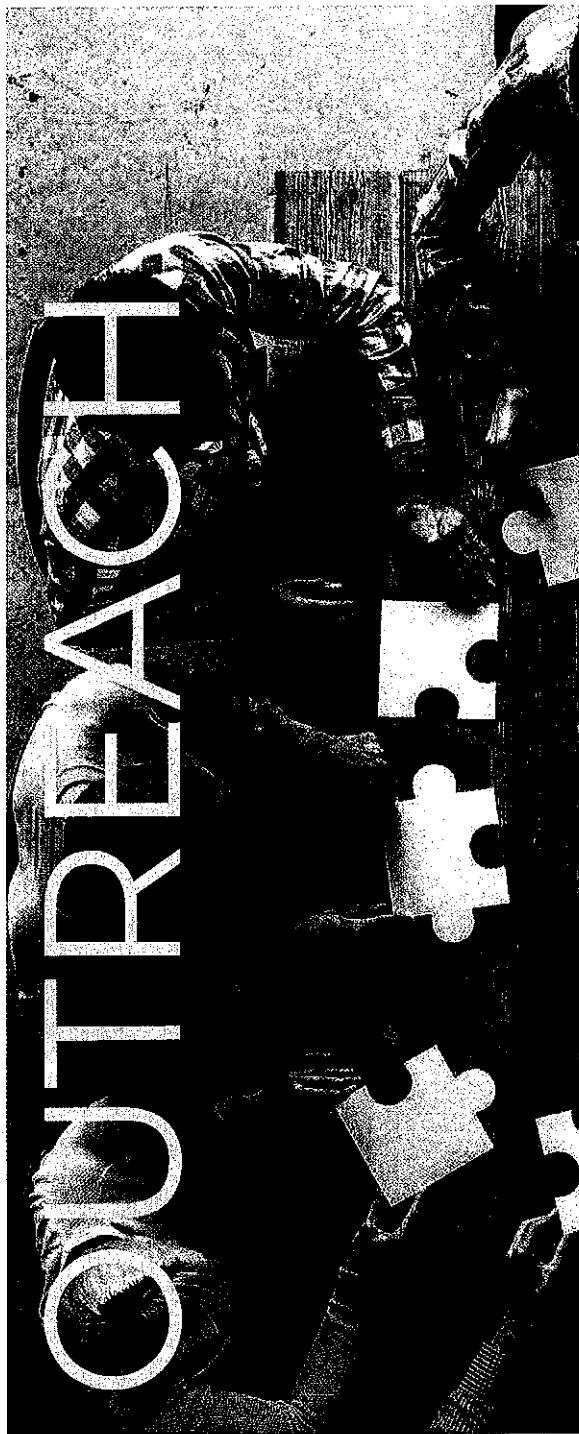
The study is also used as a tool to identify certain facility planning requirements such as capacity utilization of existing facilities, planning for modernization or new construction, and attendance boundary redistricting.

Each school attendance area was input into our GIS (Geographic Information System) Software. Students were analyzed in each area based on their residential address. Attendance pattern maps analyzed impacts of intra-district and inter-district transfers.

Birth rates data is used to project future kindergarten enrollment. It is assumed if the births indicate there was an increase of 4% one year, then there will be a corresponding 4% increase in the kindergarten class five years later.

New housing can have a significant impact on future facility and demographic planning. A complete analysis of all current and future new housing was included. A student yield rate analysis was also conducted using the most current census data.



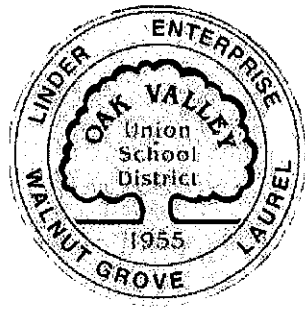


The Facilities Master Plan process is successful only if the entire school community understands the planning process and has input into both the District's needs and proposed solutions to address those needs.

As part of the standard process, we engaged designated stakeholders, such as the Board of Trustees, Administration, Staff and school site Principals throughout the process.

Standard stakeholder input includes:

- Board Meetings
- Preliminary District Administration Meeting
- Online Surveys
- Principal Meetings (During Site Assessment)



SECTION 3

FUNDING ANALYSIS

FACILITIES MASTER PLAN

Oak Valley Union
School District

Securing major funding for Facilities Master Plan projects is often a difficult task. Most districts lack sufficient funds to pay for large-scale projects and rely heavily on the State School Facility Program (SFP), and local bonds.

Projects identified in the modernization category of the Facilities Master Plan are generally funded through the SFP, local developer fees, local bonds, deferred maintenance, or other capital facility funds. Projects identified in the new construction category are generally funded through the SFP New Construction Program or local bonds.

Modernization eligibility is determined by the age of a building. Permanent eligibility is generated for buildings over the age of 25 years or 25 years from the last State modernization. Portable or relocatable eligibility is generated for buildings over the age of 20 years old. The standard State share is 60% of the eligible project amount.

New Construction eligibility is determined through a formula using enrollment projections and a baseline capacity. Funding is generally used to assist in building new schools and new classrooms due to growth. The standard State share is 50% of the eligible project amount. A local district will have to come up with a 50% match to secure State new construction funding.

Unless a district qualifies under the State Financial Hardship Program, which would then cover 100% of the eligible project amount, a district will have to come up with a local match to secure State funding.

Securing a local match often presents a financial burden to school districts. In many cases, the only viable option to come up with matching funds is to pass a local General Obligation Bond measure.

State funding often falls far short of the dollars needed to fund Facilities Master Plan Projects. Therefore, many districts rely on the ability to pass a local General Obligation Bond. Local bonds provide immediate funding instead of waiting often over four years to receive funding through the SFP. These bonds also provide the matching resources needed to access State dollars. In some cases, by passing a local bond, a district may assume enough capital facilities debt to qualify under the State Financial Hardship Program.

There is currently not enough funding revenue through the State Building Program to accomplish the projects identified in the FMP document. The District will need to find additional resources to accomplish its long-term goals and objectives.

It is recommended that Oak Valley Union continue to develop a long-term deferred maintenance plan and work closely with its team of facility planners, financial advisors and architects to maximize the amount of local funding opportunities with any future State programs.

School Facility Program (State)

Modernization Funding

60% State
40% Local

New Construction Funding

50% State
50% Local

Financial Hardship

100% State

Facility Hardship

50%-60% State
50%-40% Local

Special One-Time Programs

TK/K Program



Local Funding Options (District)

General Obligation Bond

Voter Approved

Certificates of Participation

Lease Financing

General Fund

Developer Fees

Mello-Roos

Deferred Maintenance

Routine Maintenance Account

The above examples are meant to serve as a sampling of the typical resources used to fund school facility projects. Some may not be applicable to Oak Valley Union.

HISTORIC FUNDING 1998-2023 (STATE SCHOOL FACILITY PROGRAM)

Date	Site	Project Number	Project Name	State Modernization	State New Construction	Total (Capital Obligation Bond)	Total
4/25/2003	Oak Valley Elementary	50/72017-00-001	Cafeteria	-	\$2,626,583	-	\$2,626,583
3/14/2011	Oak Valley Elementary	57/72017-00-001	Modernize Library, Wing 200	\$929,632	-	-	\$929,632
10/12/2012	Oak Valley Elementary	50/72017-00-002	Music, Room 303, Wing 100 & 600	-	\$6,395,605	-	\$6,395,605
10/31/2013	Oak Valley Elementary	50/72017-00-004	Classroom Wing 700 & Office	-	\$5,921,579	-	\$5,921,579
12/23/2015	Oak Valley Elementary	57/72017-00-002	Modernization	\$298,849	-	-	\$298,849
6/23/2020	Oak Valley Elementary	57/72017-00-003	Modernization Design Funds	\$202,874	-	-	\$202,874
Totals				\$1,431,355	\$14,943,767	-	\$16,375,122

FUTURE STATE FUNDING 2022 ANALYSIS (STATE SCHOOL FACILITY PROGRAM)

Date	Site	Project Number	Project Name	State Modernization	State New Construction	Total (Capital Obligation Bond)	Total
	Oak Valley Elementary	57/72017-00-003	Modernization	\$2,172,433	-	-	\$2,172,433
	Oak Valley Elementary	70/72017-00-001	New TK Classrooms (x2)	-	\$1,951,807	-	\$1,951,807
Totals				\$2,172,433	\$1,951,807	-	\$4,124,240

The above analysis provides an overview of the major funding revenues since 1998 and illustrates the importance of using the State School Facility Program (SFP). Since 1998 the District has received **\$1,431,355** in Modernization and **\$14,943,767** in New Construction funding through the SFP. Oak Valley Union has not passed a General Obligation Bond.

The District currently has several applications pending through the SFP. These include a New Construction application to build two (2) new TK classrooms and a Modernization application to update and modernize existing facilities and infrastructure.

When comparing the estimated future funding revenue from the State with the projects identified in the Facilities Master Plan, there is a shortfall of available funding. The FMP has identified a total of \$9,812,863 in projects. Therefore, additional capital will be needed in order to complete the projects outlined in this report.

State Modernization

Under current regulations the standard State share is 60% of the eligible project amount, and the District share is 40% of the eligible project amount.

- Eligible project amount (through 2030): **\$2,123,646 (not including current application)**
- State match 60%: \$1,274,188
- Local match 40%: \$849,458

Based off the 2023 eligibility analysis, Oak Valley Union qualifies for an additional \$2,123,646 in State Modernization eligibility. Therefore, it appears the District will be able to request these additional funds once that application 57/72017-00-003 is reviewed and processed. This brings the total State Modernization project total to approximately **\$4,296,079**.

Oak Valley Union Modernization Eligibility Analysis								
State Match (60%)	2023	2024	2025	2026	2027	2028	2029	2030
Oak Valley Union	\$1,274,188	\$1,274,188	\$1,274,188	\$1,274,188	\$1,274,188	\$1,274,188	\$1,274,188	\$1,274,188
Totals	\$1,274,188	\$1,274,188	\$1,274,188	\$1,274,188	\$1,274,188	\$1,274,188	\$1,274,188	\$1,274,188
Local Match (40%)	2023	2024	2025	2026	2027	2028	2029	2030
Oak Valley Union	\$849,458	\$849,458	\$849,458	\$849,458	\$849,458	\$849,458	\$849,458	\$849,458
Totals	\$849,458	\$849,458	\$849,458	\$849,458	\$849,458	\$849,458	\$849,458	\$849,458
Project Totals	2023	2024	2025	2026	2027	2028	2029	2030
Oak Valley Union	\$2,123,646	\$2,123,646	\$2,123,646	\$2,123,646	\$2,123,646	\$2,123,646	\$2,123,646	\$2,123,646
Totals	\$2,123,646	\$2,123,646	\$2,123,646	\$2,123,646	\$2,123,646	\$2,123,646	\$2,123,646	\$2,123,646

Financial Hardship

The State may fund up to 100% of the eligible project amount if the District meets one of the following criteria:

- Local bonding capacity is less than \$5 million (Current bonding capacity is **\$2,987,206**)
- Over 60% of bonded indebtedness in capital facilities debt
- Passed a Proposition 39 bond in the last two years

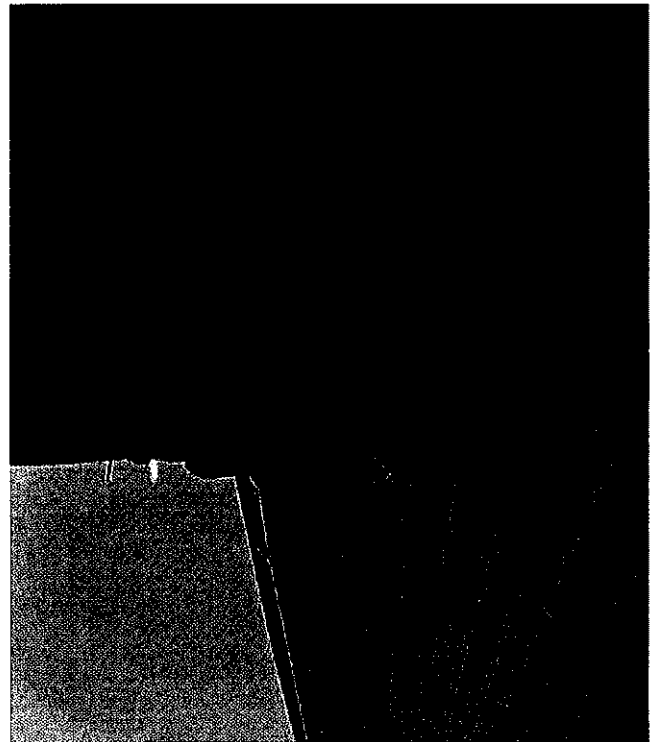
Oak Valley Union currently has a bonding capacity less than \$5 million and qualifies for Financial Hardship.

A Deferred Maintenance Pacing Guide is intended to serve as an administrative budgeting and planning tool. School districts should invest annually to fund the repair and maintenance of school facilities regardless of facility conditions. The annual replacement quantities and estimated costs assume school facilities are functional, have only normal wear and tear, and should reach normal life expectancy.

Projects in the Facilities Master Plan are intended to correct immediate facility deficiencies, modernize existing facilities to restore their useful life, or build new facilities to meet changing program requirements. Deferred Maintenance projects are intended to replace building components that have reached normal life expectancy but have not yet failed. Deferred Maintenance projects preserve the useful life of a facility but do not change how the facility is used or functions.

If current facility conditions are deficient and require immediate attention, it is possible for a specific scope of work to appear both in the Facilities Master Plan and in the Deferred Maintenance Pacing Guide. For example, a roof replacement may be required immediately to fix leaks and prevent property damage. However, even if fully replaced now, the new roof will eventually need to be replaced at normal life expectancy before another failure occurs.

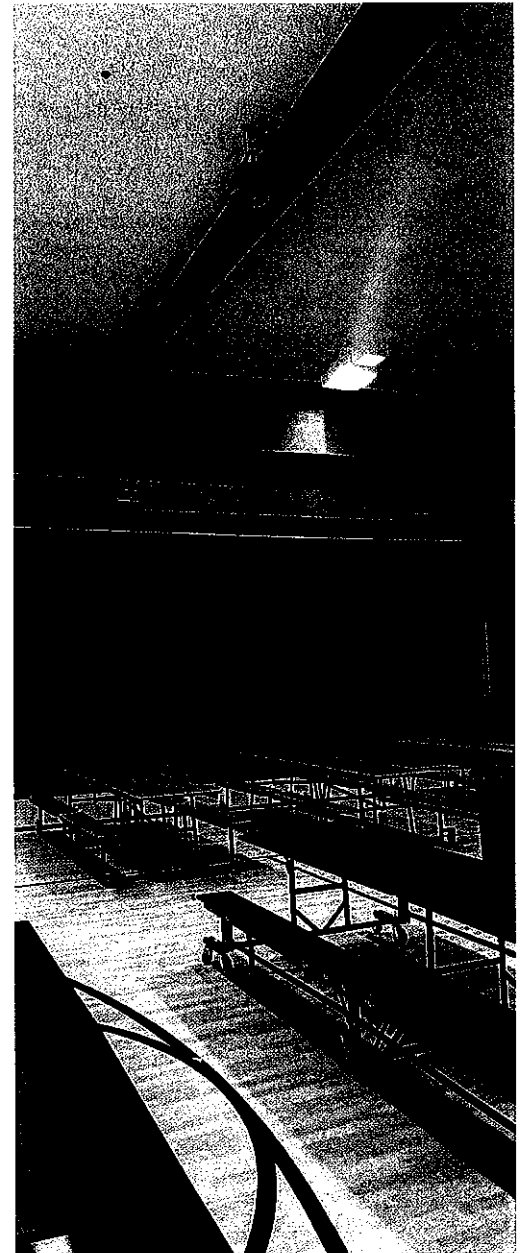
The Deferred Maintenance Pacing Guide intentionally avoids making specific project recommendations. The local facility manager is best equipped to organize and sequence projects based upon their experience and knowledge of local facilities. Even if no Deferred Maintenance projects are planned for the current fiscal year, annual budget allocations should be put into reserve to fund future projects. Deferred Maintenance projects often require several years of budgeting and saving to make sure the school district is prepared to fund projects when needed.



EC Section 17070.75 requires school districts that participate in the School Facility Program (SFP) to make all necessary repairs, renewals, and replacements to ensure that a project is at all times maintained in good repair, working order, and condition. This is accomplished by the establishment of a restricted account within the District's General Fund for the exclusive purpose of providing moneys for ongoing and major maintenance of school buildings. EC Section 17070.75 requires a District to deposit a specified amount in each fiscal year, for 20 years, when SFP funds are received.

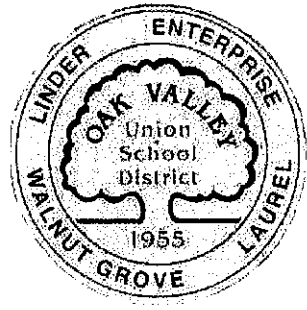
Routine Restricted Maintenance Account (RRMA) funds are used to repair or maintain existing building components. RRMA funds cover normal building maintenance activities, supplies and consumables, such as HVAC filters, light bulbs, paint, floor wax and repair parts. Most of these maintenance activities fall below public bid thresholds and do not require Division of State Architect (DSA) oversight. RRMA activities are best described as light maintenance to maintain the facility in good working order.

In contrast, Deferred Maintenance (DM) projects are intended to replace building components that have reached normal life expectancy but have not yet failed. Deferred Maintenance projects often replace entire building components such as flooring, roofing or HVAC units. DM projects are usually big enough to require a public bid process and may require DSA oversight. Deferred Maintenance projects preserve the useful life of a facility but do not change how the facility is used or functions.



OAK VALLEY UNION BUILDING SYSTEM	TYPE	LIFE EXPECTANCY YEARS	SCHOOL SITE QUANTITY	UNIT OF MEASURE	UNIT REPLACEMENT COST	ANNUAL REPLACEMENT QUANTITY	ANNUAL BUDGET ALLOCATION
Roofing	Shingle Roof	30	79,507	Sq Ft	\$30.00	2,650.23	\$79,507.00
Roofing	Relocatable classroom roof	25	10,380	Sq Ft	\$25.00	415.20	\$10,380.00
Flooring	Carpet, VCT, LVT	10	65,970	Sq Ft	\$10.00	6,597.00	\$65,970.00
Paving	Asphalt Paving (Seal Coat)	4	163,000	Sq Ft	\$1.00	40,750.00	\$40,750.00
Paving	Flatwork	30	49,000	Sq Ft	\$15.00	1,633.33	\$24,500.00
Paint	Exterior paint	12	47,000	Sq Ft	\$8.00	3,916.67	\$31,333.33
Paint	Interior Paint	10	39	Classroom	\$5,000.00	3.90	\$19,500.00
HVAC	HVAC dual-pack rooftop	20	33	HVAC unit	\$15,000.00	1.65	\$24,750.00
HVAC	HVAC wall hung bard unit	20	9	HVAC unit	\$10,000.00	0.45	\$4,500.00
							\$301,190.33

Per our recommendations from the Deferred Maintenance Pacing Guide, it is suggested that the Oak Valley Union annually invest a minimum of **\$301,191** in its Deferred Maintenance budget.



SECTION 4

SITE ASSESSMENT

FACILITIES MASTER PLAN

Oak Valley Union
School District



Throughout the State of California one of the most common themes facing school districts today is the challenge of maintaining aging sites and infrastructure while dealing with increased construction costs and limited funding resources. In most cases, the scope of projects identified in a Facilities Master Plan (FMP) far exceed the amount of available funding.

So how do you decide which projects are the highest priority and need immediate attention and which can be deferred until additional funding is available? There is no simple answer to this question, and it often comes down to the individual District's short-term and long-term goals and objectives. This FMP will establish a base criteria of categories identified during the school site assessments.

Projects often fall into one of five categories: Health, Safety & Security; Major Building Modernization; Basic Building Modernization; Site Improvements; and New Additions and Enhancements. When creating a successful facilities improvement program, it's important to annually review the scope of work along with current and future funding options.

While interchangeable, most Health, Safety & Security, Building Modernization and Site Improvements are funded partially through the School Facility Program (SFP), local developer fees, local bonds, deferred maintenance funds or other capital facility funds. New Additions and Enhancements are often large-scale master planned projects that will require significant capital and are generally funded from local General Obligation Bonds or the State New Construction Program.

With local knowledge and input from key stakeholders, the FMP strives to lay out a plan that categorizes projects into one of the five assessment categories. Certain projects may overlap depending on scope of work or funding resources.

**HEALTH, SAFETY
& SECURITY**

Security Alarm, Fire Alarm, Bell & Intercom, Hazard Materials Abatement, Surveillance Cameras, Fencing, ADA Compliance, Critical Path of Travel, Drinking Fountains, Doors Locks & Hardware.

**MAJOR BUILDING
MODERNIZATION**

HVAC, Roofing, Window Replacement, Restroom Refresh, Interior Reconfiguration

**BASIC BUILDING
MODERNIZATION**

Exterior Paint, Interior Paint, Flooring, Lighting Upgrades, Casework & Cabinets, Low Voltage, Exterior Repairs, Rain Gutters.

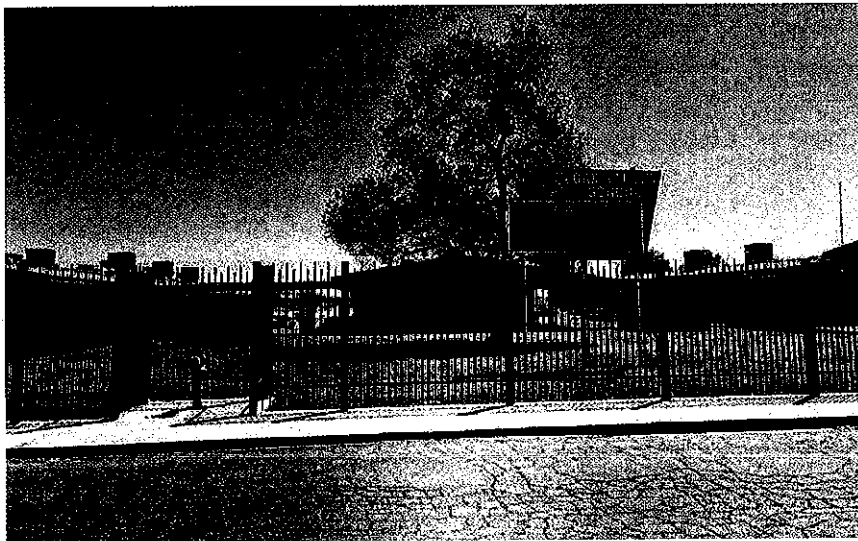
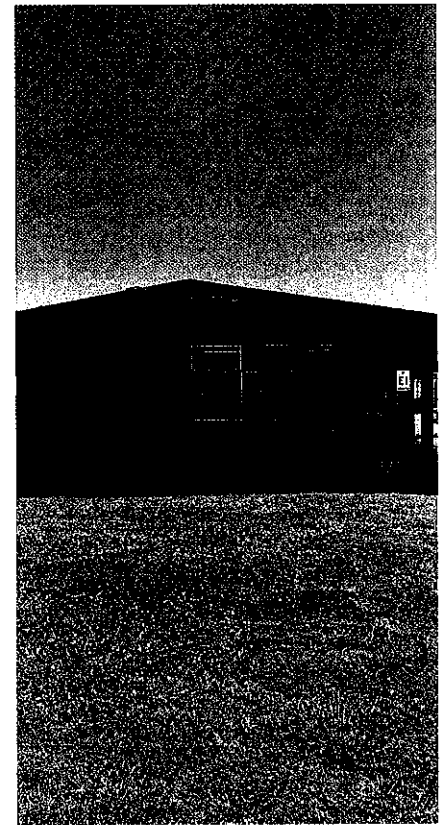
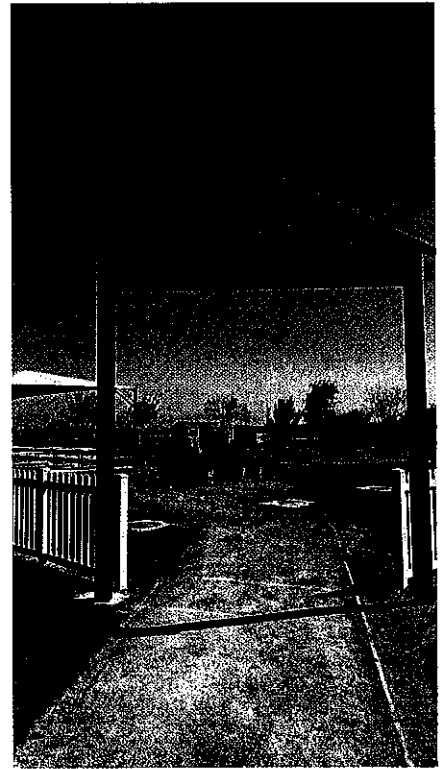
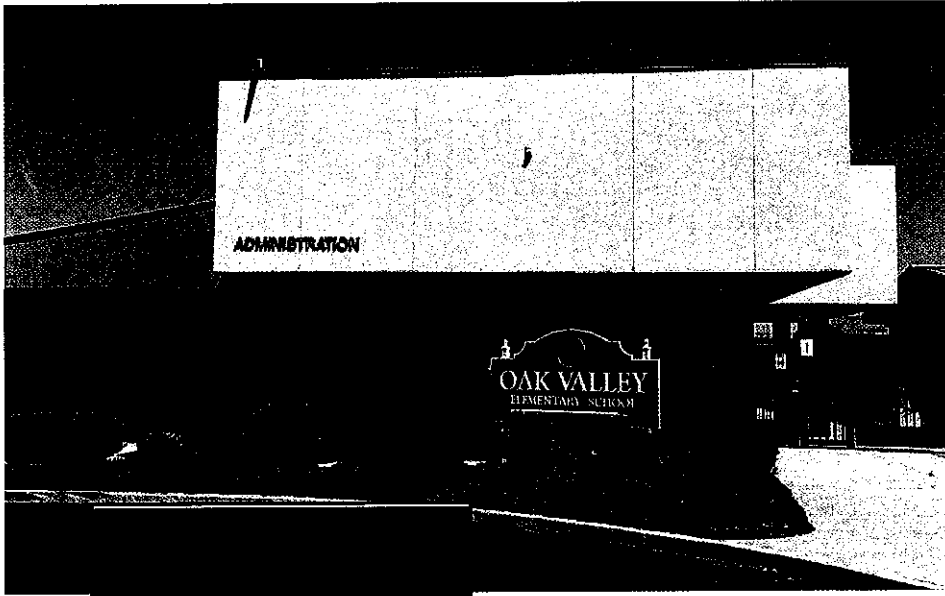
SITE IMPROVEMENTS

Utilities, Technology, Landscaping & Irrigation, Signage & Marquees, Concrete & Asphalt Repair, Flatwork, Playground Replacement, Playground Equipment, Shade Structures, Parking & Traffic Flow

**NEW ADDITIONS &
ENHANCEMENTS**

Portable Classroom Replacement, New Classrooms, New Support Facilities.

OAK VALLEY UNION SCHOOL

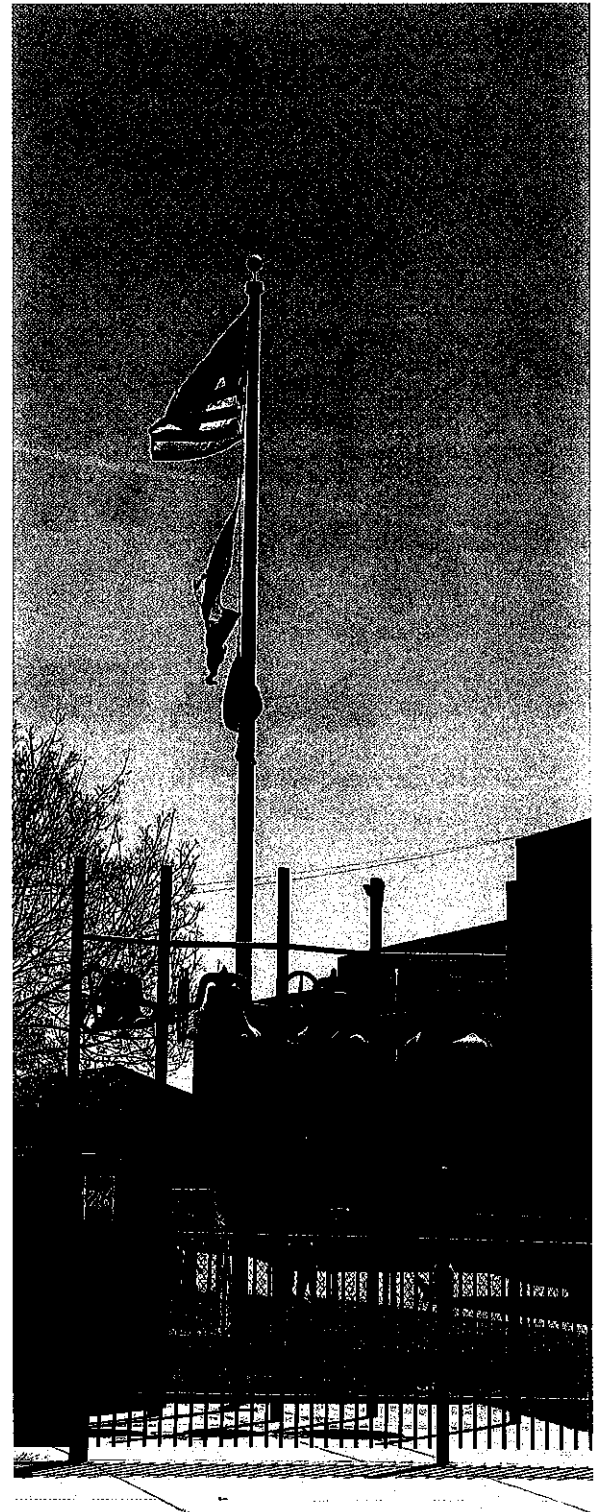


Oak Valley Union School District is located in Tulare County, six miles northwest of the City of Tulare, the county seat. The main office, a library, and five classrooms remain of the original buildings from 1957. Today, the Oak Valley campus consists of 13 permanent buildings which house 30 classrooms, and 10 portable buildings, housing 9 classrooms.

As of the 2022/23 school year, the District serves 569 students in Grades TK-8th. Demographically, the District is 80% Latino and 16% White, with other ethnicities representing the remaining 4% of students. Socio-economically disadvantaged (SED) students make up 77.2% of the student population. English Learners comprise approximately one-quarter of the enrollment.

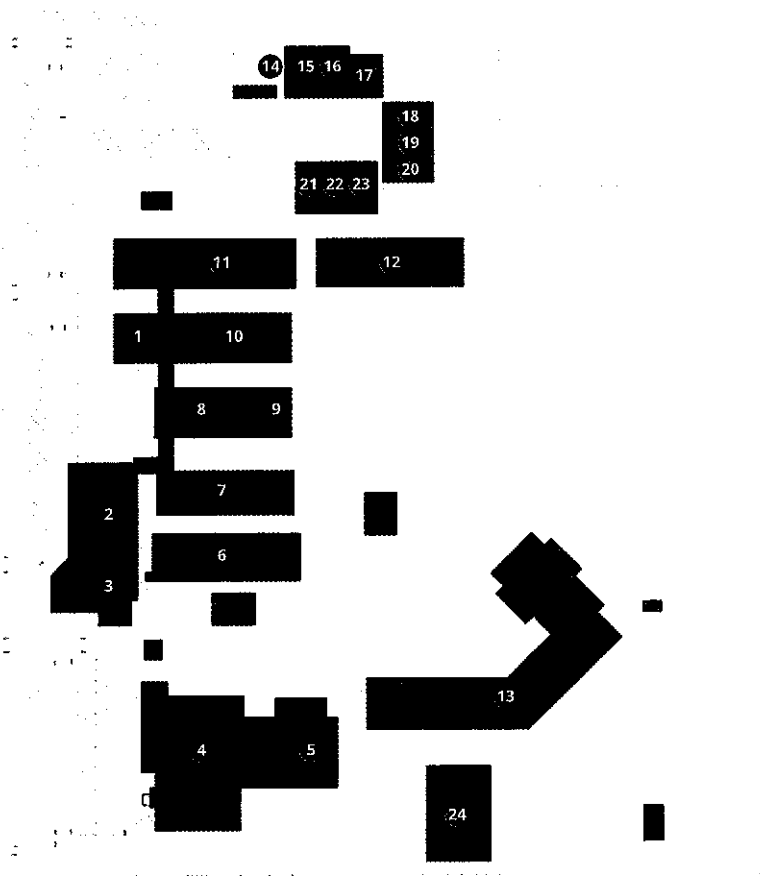
The District has been active in the School Facilities Program, having utilized New Construction funding for growth in 2003, 2012, and 2013, and having modernized its facilities in 2011, 2015, and 2020. These combined projects have brought in approximately \$16 million toward the improvement and expansion of the District's facilities in the last 20 years.

The major current facility needs include roofing, asphalt replacement, path-of-travel improvements, and ADA upgrades to restrooms. New Construction projects include plans for a new TK/K wing and a new classroom for middle school students. Recently, water quality issues have become a concern, so currently all water, including irrigation water, is treated to meet drinking water standards. This is not only expensive, but it's also not optimal, as turf and landscape vegetation do not thrive when exposed to treated water for extensive periods of time. The District is looking into a reconfiguration of its water infrastructure in order to separate potable and non-potable water in the future.



EXISTING SITE PLAN

OAK VALLEY UNION SCHOOL



1 SITE PLAN
SCALE 1"=50'



SITE DETAILS

24500 Rd 68
Tulare, CA 93274
P: 559.688.2908

Date Built: 1961
Acreage: 19.5
Grade Levels: TK-8



PERMANENT

- 1 E1 District Office
- 2 H1 Library
- 3 H1 Office
- 4 I2 Cafeteria
- 5 12 Music Addition
- 6 H2 100 Wing 101-103
- 7 G2 200 Wing 201-203
- 8 F2 300 Wing 301-302
- 9 F2 300 Wing 300
- 10 E2 400 Wing 401-403
- 11 D2 500 Wing 501-504
- 12 D3 600 Wing 601-604
- 13 I3 700 Wing 701-710

PORTABLE

- 14 A3 Portable 801
- 15 A3 Portable 802
- 16 A3 Portable 803
- 17 B3 Portable 804
- 18 B3 Portable 805
- 19 B3 Portable 806
- 20 B3 Portable 807
- 21 C3 Portable 808
- 22 C3 Portable 809
- 23 Ce Portable 810

OTHER

- 24 J3 Bus Barn

ID	Building Name/Classrooms	Construction Type	Interior Area	Roof Area	Classrooms	Date Built	Age
1	E1 District Office	Permanent	960	2,069	0	1961	61
2	H1 Library	Permanent	4,039	6,085	0	1961	61
3	H1 Office	Permanent	2,026	3,040	0	2013	9
4	I2 Cafeteria	Permanent	11,200	11,200	0	2004	18
5	I2 Cafeteria Music Addition	Permanent	2,929	2,929	0	2013	9
6	H2 100 Wing 101-103	Permanent	4,320	5,536	3	2015	7
7	G2 200 Wing 201-203	Permanent	3,262	5,099	3	1961	61
8	F2 300 Wing 301-302	Permanent	2,302	4,436	2	1961	61
9	F2 300 Wing 303	Permanent	960	1,554	1	2015	7
10	E2 400 Wing 401-403	Permanent	3,262	7,465	3	1961	61
11	D2 500 Wing 501-504	Permanent	4,692	7,655	4	1961	61
12	D3 600 Wing 601-604	Permanent	4,320	5,710	4	2015	7
13	I3 700 Wing 701-710	Permanent	12,578	16,729	10	2013	9
14	A3 Portable 801	Portable	480	660	0	1999	23
15	A3 Portable 802	Portable	960	1,080	1	1999	23
16	A3 Portable 803	Portable	960	1,080	1	1999	23
17	B3 Portable 804	Portable	960	1,080	1	1999	23
18	B3 Portable 805	Portable	960	1,080	1	1996	26
19	B3 Portable 806	Portable	960	1,080	1	1996	26
20	B3 Portable 807	Portable	960	1,080	1	1996	26
21	C3 Portable 808	Portable	960	1,080	1	1988	34
22	C3 Portable 809	Portable	960	1,080	1	1988	34
23	C3 Portable 810	Portable	960	1,080	1	1988	34
24	J3 Bus Barn	Other	5,207	5,207	0	0	0
Building Statistics			Interior Area	Roof Area	Classrooms	Average Age	
Permanent			56,850	79,507	30	33	
Portable			9,120	10,380	9	27	
Other			5,207	5,207	0		
Totals			71,177	95,094	39		

Classrooms can be used for a multitude of types of instruction. The number of classrooms used in the building inventory is based on a gross count and used to calculate eligibility through the School Facility Program (SFP).

Certain SFP defined classroom spaces used for pull-out programs, county programs, or other specialized uses that meet the criteria of a classroom space are included in the gross classroom count.

HEALTH, SAFETY & SECURITY

- Hold allowance for path of travel improvements

MAJOR BUILDING MODERNIZATION

- Covered walkway roof replacement scheduled for June 2023
- Library roof replacement scheduled for June 2023
- Remodel restrooms
- Replace windows
- Roof replacement
- Upgrade HVAC

BASIC BUILDING MODERNIZATION

- Upgrade interior lighting to LED
- Replace doors and door hardware
- Modernize classrooms (paint, flooring & casework)
- Paint building exteriors

SITE IMPROVEMENTS

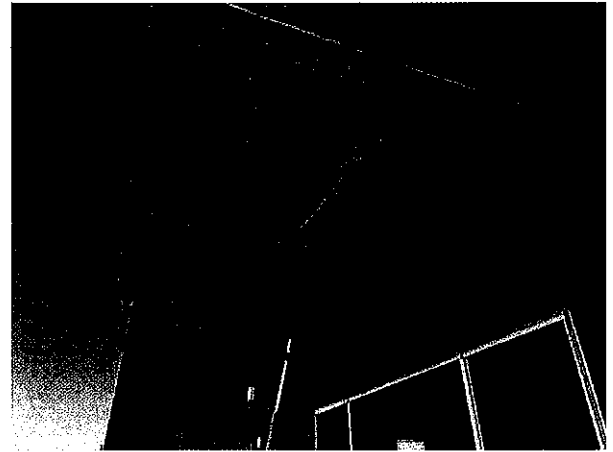
- Shade structure for farm animals scheduled for summer 2023
- Thermostat and drinking fountain replacement grants are pending
- Repave asphalt maintenance yard driveway
- Repave asphalt parking lot (center section only)
- Patch and seal asphalt parking lot (north section only)
- Patch and seal asphalt playground (exterior sports courts)
- Add new playground equipment for grades 4-6
- Add drywells (x4) in turf areas between classroom wings to resolve ponding issues

NEW ADDITIONS & FUTURE ENHANCEMENTS

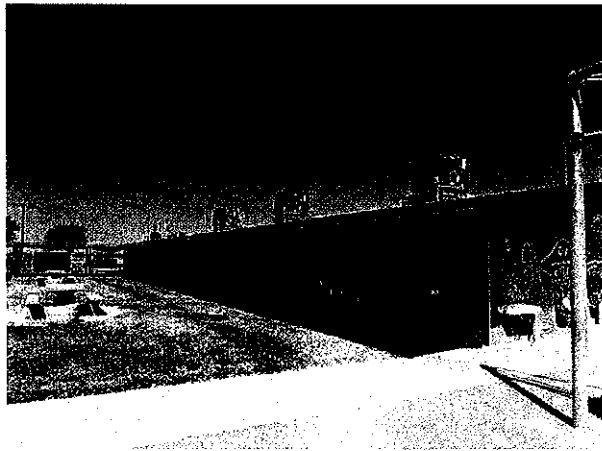
- Solar project
- Construction of TK classrooms (x2)
- Add classrooms for middle school growth (x2)
- Remodel sports fields
- Separate irrigation water supply from water treatment plant to reduce operating costs
- Complete modernization project of original classroom wings



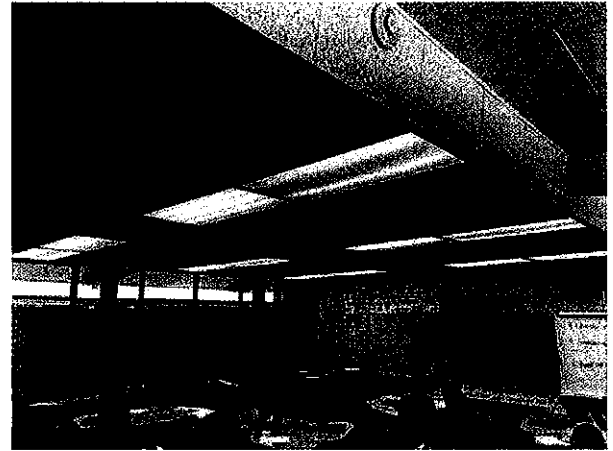
Paint building exteriors



Roof leak at portable classrooms



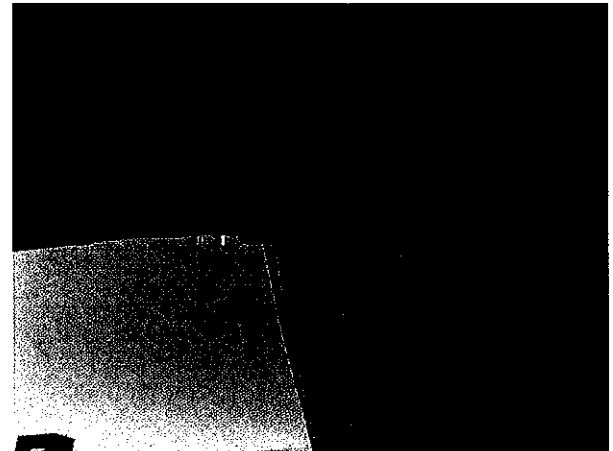
Modernize classrooms



Modernize classrooms

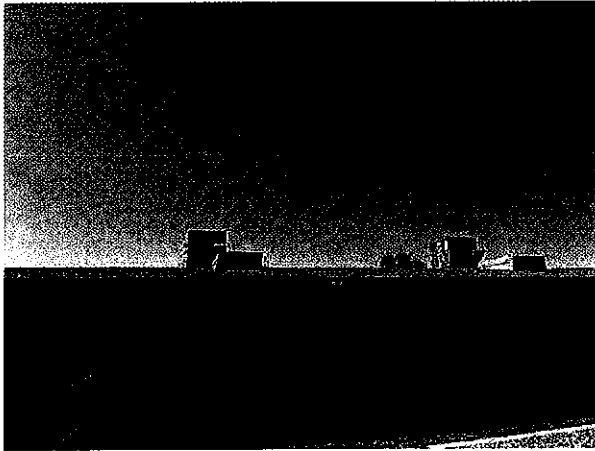


Replace windows

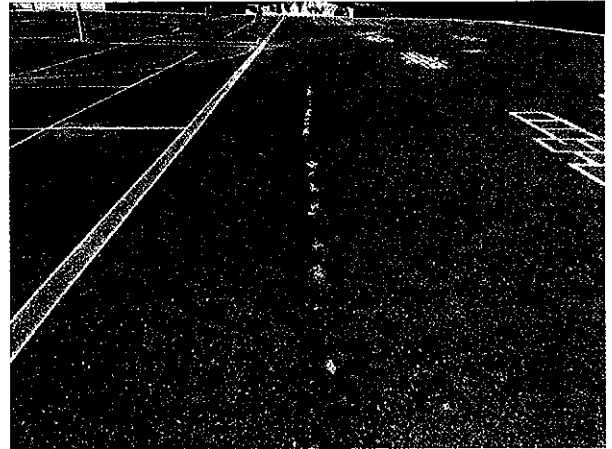


Repair dry rot

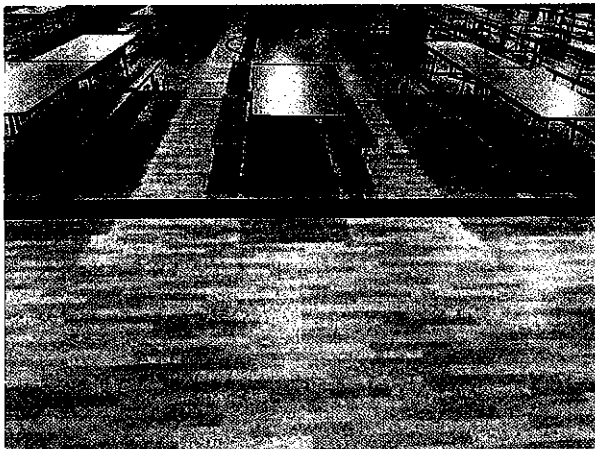
ASSESSMENT PHOTOS



Replace roofs



Repair sports courts



Replace cafeteria sports floor



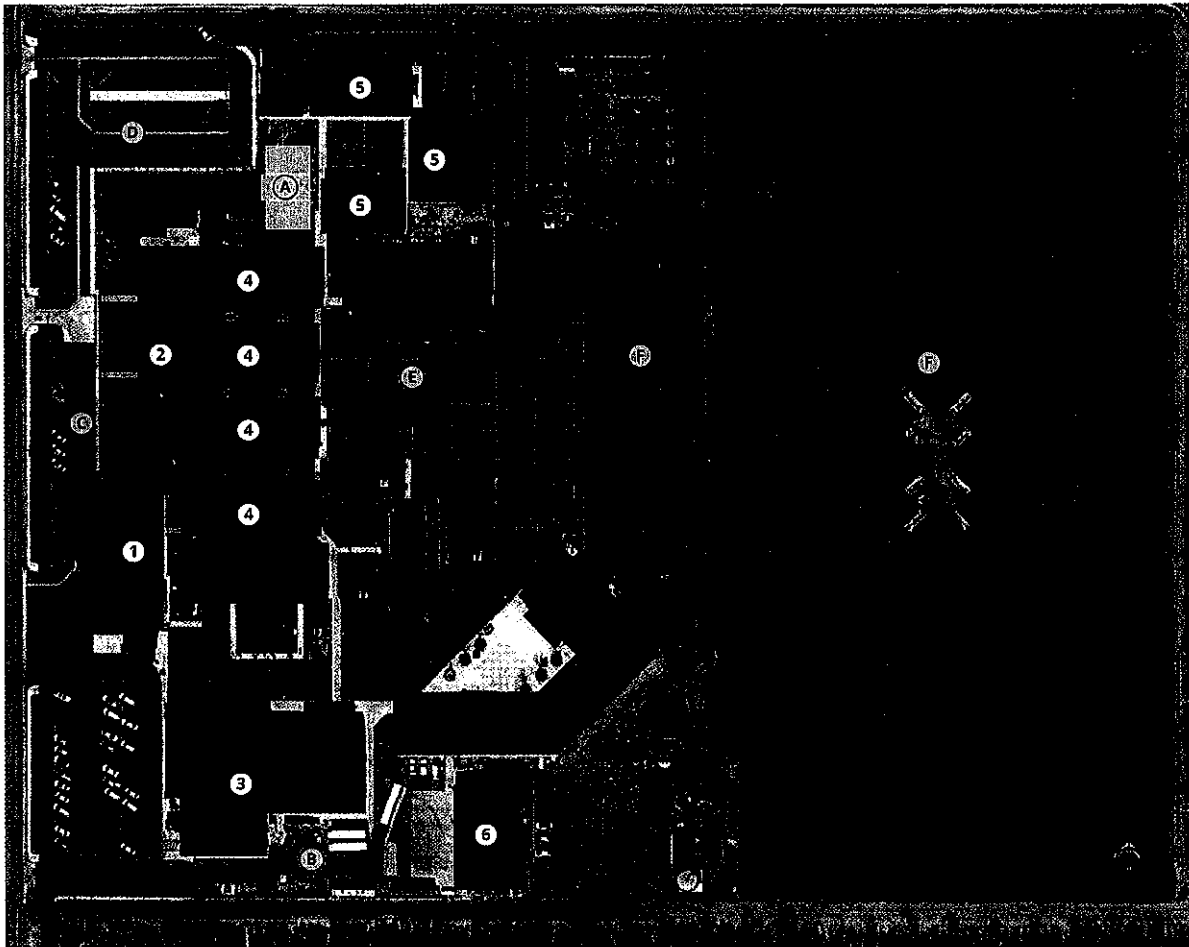
Parking lot surface



Maintenance driveway



Upgrade interior lighting to LED



SITE & INFRASTRUCTURE

- Ⓐ • New 2 classroom TK building
- Ⓑ • Repave maintenance yard driveway
- Ⓒ • Repave asphalt parking lot
- Ⓓ • Patch and seal asphalt
- Ⓔ • Patch and seal asphalt sports courts
- Ⓕ • Upgrade sports fields

OTHER SITE NEEDS

- Add new playground equipment grades 4-6
- Hold allowances for path of travel improvements
- Add dry wells (x4) between classroom wings
- Separate irrigation water supply from water treatment plant to reduce operating costs
- Future Middle School classrooms to accommodate growth

EXISTING BUILDINGS

- ① • Upgrade interior lighting
- ② • Upgrade interior lighting
• Doors and hardware
• Replace windows
• Remodel restrooms
- ③ • Upgrade interior lighting
• Add walk-in freezer
• Replace sports floor
• Replace stage VCT flooring

- ④ • Modernize building
• Replace windows
• Doors and hardware
• Casework
• Upgrade interior lighting
• Resurface interior (floors, paint, etc.)
• Paint exterior
• Remodel restrooms

EXISTING BUILDINGS

- ⑤ • Replace roofs
• Replace wall mounted HVAC
• Upgrade interior lighting
• Replace carpet
• Paint exterior
- ⑥ • Upgrade interior lighting
• Add 1 bay to garage

COST DETAILS

OAK VALLEY UNION SCHOOL

UTILITIES	SCOPE OF WORK DESCRIPTION	AREA/UNITS	TOTAL COST
Drainage	Add drywells (x4) in turf between classrooms wings to resolve water ponding issues	4	\$9,750
Irrigation	Separate Irrigation water supply from water treatment plant to reduce operating costs		\$162,500
			\$172,250

FLATWORK	SCOPE OF WORK DESCRIPTION	AREA/UNITS	TOTAL COST
Other	Repave asphalt maintenance yard and driveway	7000 sf	\$91,000
Parking Lots	Repave asphalt parking lot (center section only)	7300 sf	\$94,900
			\$185,900

PLAYGROUND	SCOPE OF WORK DESCRIPTION	AREA/UNITS	TOTAL COST
Other	Patch and seal asphalt playground (exterior sports courts)	43,200	\$44,928
Equipment	Add new playground equipment for grades 4 - 6		\$195,000
			\$239,928

PLAYFIELDS	SCOPE OF WORK DESCRIPTION	AREA/UNITS	TOTAL COST
Play Fields	soccer/football field inside track	150,000 sf	\$1,040,000
			\$1,040,000

TRAFFIC CIRCULATION	SCOPE OF WORK DESCRIPTION	AREA/UNITS	TOTAL COST
Public Parking	Patch and seal asphalt parking lot (North section only)	26,000 sf	\$27,040
			\$27,040

ADA COMPLIANCE	SCOPE OF WORK DESCRIPTION	AREA/UNITS	TOTAL COST
Path of Travel	Hold allowance for path of travel improvements		\$65,000
			\$65,000

OUTDOOR FACILITIES	SCOPE OF WORK DESCRIPTION	AREA/UNITS	TOTAL COST
Other	Add walk in freezer box behind kitchen	200 sf	\$44,200
			\$44,200

ROOFING	SCOPE OF WORK DESCRIPTION	AREA/UNITS	TOTAL COST
A3 Portable 801	Replace roof	660 sf	\$15,600
A3 Portable 802	Replace roof	1080 sf	\$26,000
A3 Portable 803	Replace roof	1080 sf	\$26,000
B3 Portable 804	Replace roof	1080 sf	\$26,000
B3 Portable 805	Replace roof	1080 sf	\$26,000
B3 Portable 806	Replace roof	1080 sf	\$26,000
B3 Portable 807	Replace roof	1080 sf	\$26,000
C3 Portable 808	Replace roof	1080 sf	\$26,000
C3 Portable 809	Replace roof	1080 sf	\$26,000
C3 Portable 810	Replace roof	1080 sf	\$26,000
			\$249,600

HVAC	SCOPE OF WORK DESCRIPTION	AREA/UNITS	TOTAL COST
A3 Portable 801	Replace wall mounted HVAC unit	1	\$13,000
A3 Portable 802	Replace wall mounted HVAC unit	1	\$13,000
A3 Portable 803	Replace wall mounted HVAC unit	1	\$13,000
B3 Portable 804	Replace wall mounted HVAC unit	1	\$13,000
B3 Portable 805	Replace wall mounted HVAC unit	1	\$13,000
B3 Portable 806	Replace wall mounted HVAC unit	1	\$13,000
B3 Portable 807	Replace wall mounted HVAC unit	1	\$13,000
C3 Portable 808	Replace wall mounted HVAC unit	1	\$13,000
C3 Portable 809	Replace wall mounted HVAC unit	1	\$13,000
C3 Portable 810	Replace wall mounted HVAC unit	1	\$13,000
			\$130,000

DOORS & HARDWARE	SCOPE OF WORK DESCRIPTION	AREA/UNITS	TOTAL COST
E1 District Office	Replace doors and door hardware, install security door with electronic strike	4	\$20,800
G2 200 Wing 201-203	Replace doors and door hardware	6	\$31,200
F2 300 Wing 301-302	Replace doors and door hardware	4	\$20,800
F2 300 Wing 303	Replace doors and door hardware	2	\$10,400
E2 400 Wing 401-403	Replace doors and door hardware	6	\$31,200
D2 500 Wing 501-504	Replace doors and door hardware	8	\$41,600
			\$156,000

<u>EXTERIOR PAINT</u>	<u>SCOPE OF WORK DESCRIPTION</u>	<u>AREA/UNITS</u>	<u>TOTAL COST</u>
G2 200 Wing 201-203	Paint exterior	3550 sf	\$27,690
F2 300 Wing 301-302	Paint exterior	2400 sf	\$18,720
F2 300 Wing 303	Paint exterior	1200 sf	\$9,360
E2 400 Wing 401-403	Paint exterior	3400 sf	\$26,520
D2 500 Wing 501-504	Paint exterior	4100 sf	\$31,980
A3 Portable 801	Paint exterior	1280 sf	\$9,984
A3 Portable 802	Paint exterior	1280 sf	\$9,984
A3 Portable 803	Paint exterior	1280 sf	\$9,984
B3 Portable 804	Paint exterior	1280 sf	\$9,984
B3 Portable 805	Paint exterior	1280 sf	\$9,984
B3 Portable 806	Paint exterior	1280 sf	\$9,984
B3 Portable 807	Paint exterior	1280 sf	\$9,984
C3 Portable 808	Paint exterior	1280 sf	\$9,984
C3 Portable 809	Paint exterior	1280 sf	\$9,984
C3 Portable 810	Paint exterior	1280 sf	\$9,984
			\$214,110

<u>WINDOWS</u>	<u>SCOPE OF WORK DESCRIPTION</u>	<u>AREA/UNITS</u>	<u>TOTAL COST</u>
E1 District Office	Replace windows	560 sf	\$58,240
G2 200 Wing 201-203	Replace windows	780 sf	\$81,120
F2 300 Wing 301-302	Replace windows	520 sf	\$54,080
F2 300 Wing 303	Replace windows	260 sf	\$27,040
E2 400 Wing 401-403	Replace windows	780 sf	\$81,120
D2 500 Wing 501-504	Replace windows	1180 sf	\$122,720
			\$424,320

<u>INTERIOR PAINT</u>	<u>SCOPE OF WORK DESCRIPTION</u>	<u>AREA/UNITS</u>	<u>TOTAL COST</u>
G2 200 Wing 201-203	Paint interior		\$19,500
F2 300 Wing 301-302	Paint interior		\$13,000
F2 300 Wing 303	Paint interior		\$6,500
E2 400 Wing 401-403	Paint interior		\$19,500
D2 500 Wing 501-504	Paint interior		\$26,000
			\$84,500

<u>FLOORING</u>	<u>SCOPE OF WORK DESCRIPTION</u>	<u>AREA/UNITS</u>	<u>TOTAL COST</u>
I2 Cafeteria Music	Replace sports floor, replace stage VCT flooring	9000 sf	\$184,600
G2 200 Wing 201-203	Resurface interior (floors)	3262 sf	\$29,684
F2 300 Wing 301-302	Resurface interior (floors)	2302 sf	\$20,948
F2 300 Wing 303	Resurface interior (floors)	960 sf	\$8,736
E2 400 Wing 401-403	Resurface interior (floors)	3262 sf	\$29,684
D2 500 Wing 501-504	Resurface interior (floors)	4692 sf	\$42,697
A3 Portable 801	Replace carpet	960 sf	\$6,240
A3 Portable 802	Replace carpet	960 sf	\$6,240
A3 Portable 803	Replace carpet	960 sf	\$6,240
B3 Portable 804	Replace carpet	960 sf	\$6,240
B3 Portable 805	Replace carpet	960 sf	\$6,240
B3 Portable 806	Replace carpet	960 sf	\$6,240
B3 Portable 807	Replace carpet	960 sf	\$6,240
C3 Portable 808	Replace carpet	960 sf	\$6,240
C3 Portable 809	Replace carpet	960 sf	\$6,240
C3 Portable 810	Replace carpet	960 sf	\$6,240
			\$378,750

COST DETAILS

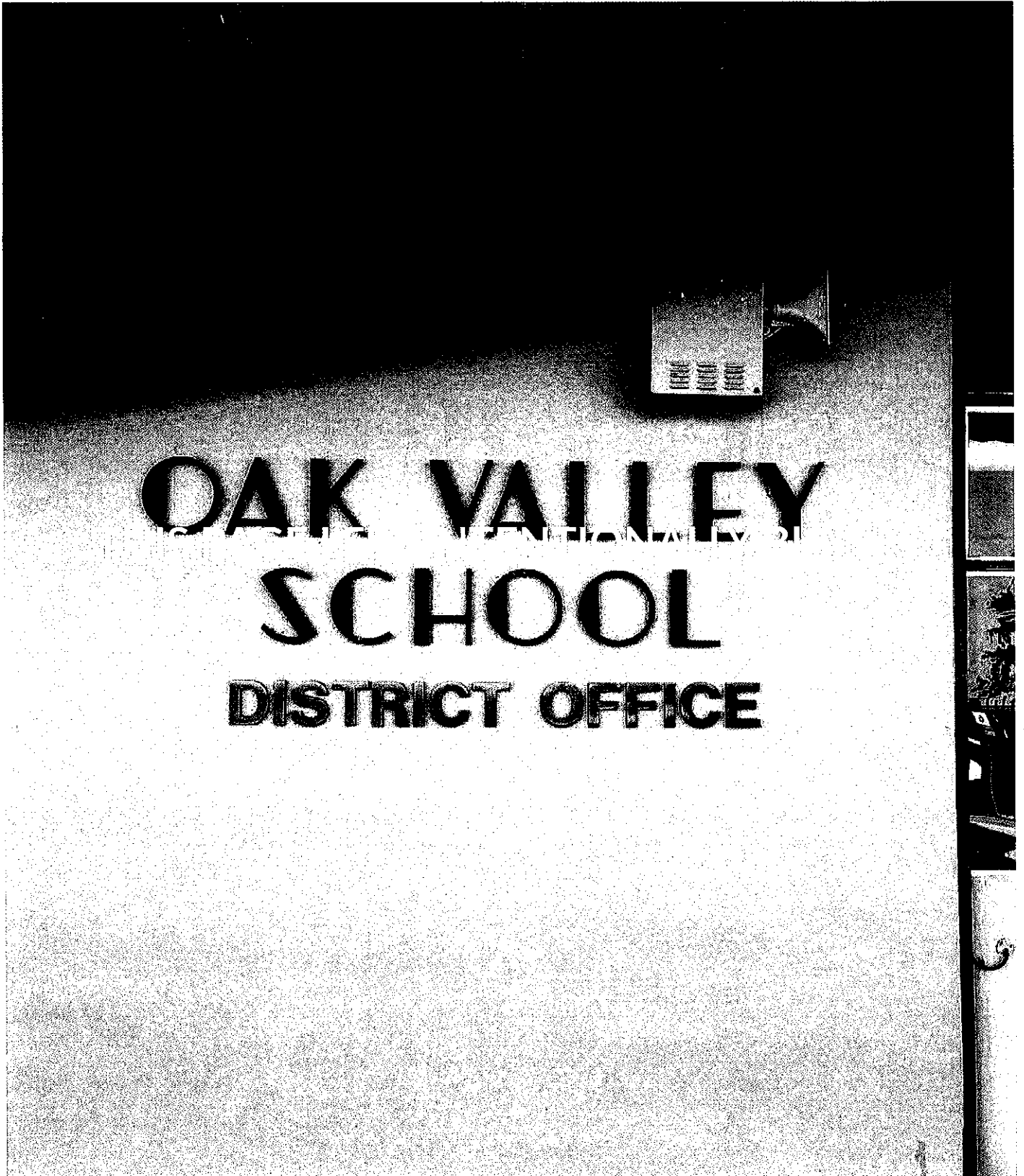
INTERIOR LIGHTING & ELECTRICAL	SCOPE OF WORK DESCRIPTION	AREA/UNITS	TOTAL COST
E1 District Office	Upgrade interior lights to LED		\$6,240
H1 Library	Upgrade interior lights to LED		\$26,000
H1 Office	Upgrade interior lights to LED		\$13,000
I2 Cafeteria Music	Upgrade interior lights to LED		\$91,000
G2 200 Wing 201-203	Upgrade interior lights to LED		\$20,800
F2 300 Wing 301-302	Upgrade interior lights to LED		\$14,950
F2 300 Wing 303	Upgrade interior lights to LED		\$6,240
E2 400 Wing 401-403	Upgrade interior lights to LED		\$20,800
D2 500 Wing 501-504	Upgrade interior lights to LED		\$30,485
A3 Portable 801	Upgrade interior lights to LED		\$5,200
A3 Portable 802	Upgrade interior lights to LED		\$5,200
A3 Portable 803	Upgrade interior lights to LED		\$5,200
B3 Portable 804	Upgrade interior lights to LED		\$5,200
B3 Portable 805	Upgrade interior lights to LED		\$5,200
B3 Portable 806	Upgrade interior lights to LED		\$5,200
B3 Portable 807	Upgrade interior lights to LED		\$5,200
C3 Portable 808	Upgrade interior lights to LED		\$5,200
C3 Portable 809	Upgrade interior lights to LED		\$5,200
C3 Portable 810	Upgrade interior lights to LED		\$5,200
J3 Bus Barn	Upgrade interior lights to LED		\$32,500
			\$314,015

CABINETS & COUNTERS	SCOPE OF WORK DESCRIPTION	AREA/UNITS	TOTAL COST
G2 200 Wing 201-203	Replace casework		\$117,000
F2 300 Wing 301-302	Replace casework		\$78,000
F2 300 Wing 303	Replace casework		\$39,000
E2 400 Wing 401-403	Replace casework		\$117,000
D2 500 Wing 501-504	Replace casework		\$156,000
			\$507,000

WALLS & CEILING	SCOPE OF WORK DESCRIPTION	AREA/UNITS	TOTAL COST
G2 200 Wing 201-203	Resurface interior (walls, drop ceiling)		\$78,000
F2 300 Wing 301-302	Resurface interior (walls, drop ceiling)		\$52,000
F2 300 Wing 303	Resurface interior (walls, drop ceiling)		\$26,000
E2 400 Wing 401-403	Resurface interior (walls, drop ceiling)		\$78,000
D2 500 Wing 501-504	Resurface interior (walls, drop ceiling)		\$104,000
			\$338,000

RESTROOMS & SHOWER/LOCKER	SCOPE OF WORK DESCRIPTION	AREA/UNITS	TOTAL COST
E1 District Office	Remodel staff restrooms for ADA, convert 2 => 1 for needed space	2	\$104,000
G2 200 Wing 201-203	Remodel student restrooms for ADA (x2)	2	\$260,000
F2 300 Wing 301-302	Remodel student restrooms for ADA (x2)	2	\$260,000
D2 500 Wing 501-504	Remodel student restrooms for ADA (x2)	2	\$260,000
			\$884,000

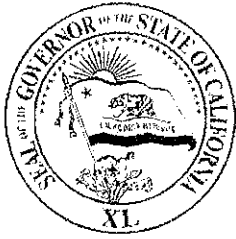
NEW ADDITIONS	SCOPE OF WORK DESCRIPTION	AREA/UNITS	TOTAL COST
Bus Barn	Add 1 bay to garage to accommodate grounds equipment	1400 sf	\$110,500
New TK/K Classrooms	Add TK classrooms (x2)	2700 sf	\$2,018,250
Middle School Classrooms	Add classrooms for middle school growth (x2)	2400 sf	\$1,794,000
			\$3,922,750





SchoolWorks, Inc.

8700 Auburn Folsom Road, #200
Granite Bay, CA 95746 (916) 300-0590



5.1C

Governor of the State of California

Gavin Newsom,
Governor of California

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Sacramento, CA 95814
916-445-2841

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Rob Bonta,
Attorney General

1300 I Street, Suite 1142
Sacramento, CA 95814
916-445-9555

California Department of Education

Tony Thurmond,
State Superintendent of Public Instruction

1430 N Street
Sacramento, CA 95814
916-319-0800

June 1, 2023

Dear California County and District Superintendents and Charter School Administrators and School Principals:

Educational Rights and Requests to Remove Instructional Materials

As we close this school year and look to the next, communities across California and the nation are being confronted with threats that invoke a darker past. In the first half of the 2022–23 school year alone, 1,477 books were banned nationally, with teachers and librarians threatened with prison time for shelving the wrong book.¹ As state leaders elected to represent the values of all Californians, we offer our response in one shared voice: Access to books—including books that reflect the diverse experiences and perspectives of Californians, and especially those that may challenge us to grapple with uncomfortable truths—is a profound freedom we all must protect and cultivate.

This letter outlines key considerations to assist you with fielding requests within your community while you continue to support your students and their educational rights.

I. The Constitution Restricts the Removal of Books From Libraries and Curricula

As the Supreme Court stated over 50 years ago: “It can hardly be argued that ... students ... shed their constitutional rights to freedom of speech or expression at the schoolhouse gate.”² Freedom of speech includes the right to receive information and ideas, including those that are controversial, unpopular, or offensive to some.³ “[T]he

¹ <https://pen.org/report/banned-in-the-usa-state-laws-supercharge-book-suppression-in-schools/>

² *Tinker v. Des Moines Independent Community School Dist.* (1969) 393 U.S. 503, 506.

³ *Board of Educ., Island Trees Union Free School Dist. No. 26 v. Pico* (1982) 457 U.S. 853, 866–867 (“The right of freedom of speech and press ... necessarily protects the right to receive it. ... It would be a barren marketplace of ideas that had only sellers and no buyers.”) (internal citations omitted); *Monteiro v. Tempe Union High School Dist.* (9th Cir. 1998) 158 F.3d 1022, 1029–1032.

function of books and other literary materials, as well as of education itself, is to stimulate thought, to explore ideas, [and] to engender intellectual exchanges.”⁴

While local educational agencies⁵ “have broad discretion in the management of school affairs,” this discretion “must be exercised in a manner that comports with the transcendent imperatives of the First Amendment.”⁶ Therefore, while a local educational agency or administrator may remove books and other materials from a school library because of their educational suitability, pervasive vulgarity or profanity, or factual inaccuracies, it “may not remove books from school library shelves simply because [officials] dislike the ideas contained in those books... .”⁷

For example, “If a Democratic school board, motivated by party affiliation, ordered the removal of all books written by or in favor of Republicans, few would doubt that the order violated the constitutional rights of the students denied access to those books.”⁸ Similarly, students’ rights would also be violated “if an all-white school board, motivated by racial animus, decided to remove all books authored by [people of color] or advocating racial equality and integration.”⁹

These principles also apply to decisions about school curricula. Curricular decisions must be based on legitimate pedagogical interests and not an attempt at “rigid and exclusive indoctrination”; “to prescribe what shall be orthodox in politics, nationalism, religion, or other matters of opinion”; or because of ideological opposition.¹⁰ And removing materials from curricula or libraries may also violate the First Amendment, even when prompted by complaints from parents or threats of lawsuits.¹¹

“Our Constitution does not permit the official suppression of *ideas*,”¹² yet that appears to be what is happening here. “[I]f we are not to strangle the free mind at its source and teach youth to discount important principles of our government as mere platitudes,” then local educational agencies and school officials must abide by the First Amendment.¹³

⁴ *Monteiro v. Tempe Union High School Dist.*, *supra*, at p. 1032.

⁵ Ed. Code, § 56026.3.

⁶ *Board of Educ., Island Trees Union Free School Dist. No. 26 v. Pico*, *supra*, 457 U.S. at p. 864.

⁷ *Id.* at p. 872; *McCarthy v. Fletcher* (1989) 207 Cal.App.3d 130, 144.

⁸ *Board of Educ., Island Trees Union Free School Dist. No. 26 v. Pico*, *supra*, 457 U.S. at p. 871.

⁹ *Ibid.*

¹⁰ *McCarthy v. Fletcher*, *supra*, 207 Cal.App.3d at p. 146; *Monteiro v. Tempe Union High School Dist.*, *supra*, 158 F.3d at p. 1029 fn. 8.

¹¹ *Monteiro v. Tempe Union High School Dist.*, *supra*, 158 F.3d at p. 1029 (“[A] student’s First Amendment rights are infringed when books that have been determined by the school district to have legitimate educational value are removed from a mandatory reading list because of threats of damages, lawsuits, or other forms of retaliation.”).

¹² *Board of Educ., Island Trees Union Free School Dist. No. 26 v. Pico*, *supra*, 457 U.S. at p. 871 (emphasis in original); see also *West Virginia State Board of Education v. Barnette* (1943) 319 U.S. 624, 642 (“If there is any fixed star in our constitutional constellation, it is that no official, high or petty, can prescribe what shall be orthodox in politics, nationalism, religion, or other matters of opinion...”).

¹³ *West Virginia State Board of Education v. Barnette*, *supra*, 319 U.S. at p. 637.

II. Education and Exposure to Various World Views Are Vital for our Youth

Education is essential to prepare our youth for civic participation and to instill the values needed to maintain our democracy.¹⁴ As California's own Constitution recognizes, the "diffusion of knowledge and intelligence [is] essential to the preservation of the rights and liberties of the people... ."¹⁵ Moreover, since before the days of *Brown v. Board of Education*,¹⁶ formal education has played an essential role in the struggle for civil rights and in building understanding of differences as well as shared values. Schools "bring together members of different racial and cultural groups and, hopefully, help them to live together 'in harmony and mutual respect.'"¹⁷

"Those who choose the books and literature that will influence the minds and hearts of our nation's youth and those who teach young people in our schools bear an awesome responsibility."¹⁸ This responsibility must neither be taken lightly nor used for inappropriate, political, or partisan ends.

III. California Education Code Requires Local Educational Agencies to Provide a Representative and Unbiased Curriculum and Protects a Student's Right to Freedom of Speech

Local educational agencies must provide students a representative social sciences curriculum that provides instruction on "the role and contributions of both men and women, Native Americans, African Americans, Mexican Americans, Asian Americans, Pacific Islanders, European Americans, lesbian, gay, bisexual, and transgender Americans, persons with disabilities, and members of other ethnic and cultural groups" to the development of California and the United States and "the role of these groups in contemporary society."¹⁹ Any instructional materials adopted by a local educational agency must "accurately portray the cultural and racial diversity of our society," including the roles and contributions of these groups.²⁰

Schools may not adopt textbooks or other materials or provide or sponsor instruction or activities that promote discriminatory bias against or that reflect adversely on persons on the basis of race, ethnicity, nationality, gender, gender identity, gender expression, religion, disability, sexual orientation, immigration status, or any other protected characteristic.²¹ California law strictly prohibits discrimination on any of these bases.²² A local educational agency's removal of materials on the basis that the materials discuss

¹⁴ See *Board of Educ., Island Trees Union Free School Dist. No. 26 v. Pico*, 457 U.S. at p. 864 (quoting *Ambach v. Norwick* (1979) 441 U.S. 68, 76–77).

¹⁵ Cal. Const., art. IX, § 1.

¹⁶ *Brown v. Board of Ed. of Topeka, Shawnee County, Kan.* (1954) 347 U.S. 483.

¹⁷ *Hartzell v. Connell* (1984) 35 Cal.3d 899, 908 (internal citations omitted).

¹⁸ *Monteiro v. Tempe Union High School Dist.*, *supra*, 158 F.3d at p. 1032.

¹⁹ Ed. Code, § 51204.5.

²⁰ Ed. Code, § 60040.

²¹ Ed. Code, §§ 51500, 51501, 60044. Section 51500 also prohibits teachers from providing instruction "which reflects adversely upon persons because of their race, sex, color, creed, handicap, national origin, or ancestry."

²² Ed. Code, § 220.

or reflect these characteristics and identities may constitute unlawful discrimination. A complaint of discrimination based on a protected characteristic may be filed with a local educational agency and appealed to the California Department of Education (CDE).²³

California law also prohibits instructional materials that contain any “sectarian or denominational doctrine” or other propaganda.²⁴

In addition to requiring local educational agencies to provide a representative and unbiased curriculum in these ways, the *Education Code* provides robust protections for student speech, including protections beyond those guaranteed by the Constitution. California students:

... have the right to exercise freedom of speech and of the press including, but not limited to, the use of bulletin boards, the distribution of printed materials or petitions, the wearing of buttons, badges, and other insignia, and the right of expression in official publications, whether or not the publications or other means of expression are supported financially by the school or by use of school facilities.²⁵

Only expression that is obscene, libelous, or slanderous or that “so incites pupils as to create a clear and present danger of the commission of unlawful acts on school premises or the violation of lawful school regulations, or the substantial disruption of the orderly operation of the school” may be prohibited.²⁶ Prior restraint of any other type of expression violates the law, including in “material prepared for official school publications,” like school newspapers.²⁷ Furthermore, local educational agencies must “adopt rules and regulations in the form of a written publications code, which shall include reasonable provisions for the time, place, and manner” of speech activities.²⁸

For further guidance, please refer to the CDE’s recent publication, “Guidance on Removal of Instruction or Instructional Materials,” which is available on the CDE Curriculum Frameworks and Instructional Resources web page at <https://www.cde.ca.gov/ci/cr/cf/index.asp>.

IV. Possible Requests for Information

If your local educational agency does remove or ban instructional materials from classrooms or libraries, you may be requested to provide the Attorney General’s Office with materials to allow it to analyze your agency’s actions and procedures. These materials may include the following:

²³ Ed. Code, § 33315, subd. (a).

²⁴ Ed. Code, § 60044.

²⁵ Ed. Code, § 48907, subd. (a).

²⁶ *Ibid.*

²⁷ *Id.*, subd. (d).

²⁸ *Id.*, subd. (b).

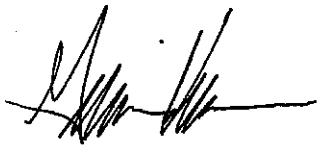
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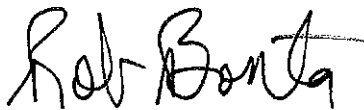
- All policies and procedures related to the First Amendment and freedom of speech;
- All policies and procedures for the assessment of instructional materials, library books, and other materials for students, including assessments of their suitability for students;
- All policies and procedures related to the removal or discontinuation of instructional materials or the removal of any books or other materials from school libraries and/or classrooms;
- All documents and communications related to the materials, including those reflecting the basis for their removal or assessments of their suitability for students; and
- Any complaints received related to the materials.

Please be prepared to respond to requests for information in the event the Attorney General's Office reaches out.

Sincerely,



GAVIN NEWSOM
Governor



ROB BONTA
Attorney General



TONY THURMOND
State Superintendent of
Public Instruction





May 30, 2023

Dear County and District Superintendents and Charter School Administrators:

Guidance on Removal of Instruction or Instructional Materials

Recently, questions have arisen about the efforts of local governing boards to remove certain instruction or instructional materials. This memo reminds the local educational agencies (LEAs) that interact with these governing boards of (1) students' First Amendment right to receive information, (2) students' right to be free from discrimination, (3) legal requirements for instruction and instructional materials, and (4) legal prohibitions on instruction and instructional materials.

California's System

The state has adopted broad minimum content standards in core subjects and adopts standards-aligned curriculum frameworks to guide local curriculum development and implementation. It is a state priority that LEAs use instructional materials that are aligned with those standards and frameworks, and LEAs must ensure that such materials are available to all students.¹ Local governing boards are responsible for adopting instructional materials and policies for local instruction and learning and making specific curriculum decisions.

As explained below, local governing boards must bear in mind a number of federal and state laws when taking such actions.

Students' First Amendment Rights

Students have the right to receive information. This right may be violated by actions that remove or prohibit materials, ideas, or activities. In an often-cited case, the U.S. Supreme Court stated that a student's First Amendment right to access of information is violated when school officials remove books from a library "simply because they dislike the ideas contained in those books and seek by their removal to 'prescribe what shall be orthodox in politics, nationalism, religion, or other matters of opinion.'"²

¹ Cal. Educ. Code §§ 52060(d)(1), 52064(b)(1) and 60119.

² *Board of Educ., Island Trees Union Free School Dist. No. 26 v. Pico*, 457 U.S. 853, 871-72 (1982).

Students' Right to Be Free From Discrimination

The law prohibits discrimination, harassment, intimidation, and bullying directed against students based on actual or perceived traits or characteristics such as race, sex, gender identity, disability, religion, etc.³ Local governing boards must be mindful of the effect that proposed actions may have on any and all of their students. Actions that remove or prohibit particular materials, ideas, or activities may have the effect of discriminating against certain students based on protected characteristics. A complaint of discrimination based on a protected characteristic may be filed with an LEA and appealed to the California Department of Education.⁴

Required Instruction and Instructional Materials

California law requires the following with respect to instruction and instructional materials:

There must be comprehensive sexual health instruction at least once in junior high or middle school and at least once in high school that must, among other things, teach pupils about gender, gender expression, and gender identity and explore the harm of negative gender stereotypes and affirmatively recognize that people have different sexual orientations and, when discussing or providing examples of relationships and couples, must be inclusive of same-sex relationships.⁵

Instruction in social sciences must include the roles and contributions of both men and women, members of various races/ethnic groups, lesbian, gay, bisexual, gay, bisexual, and transgender Americans, persons with disabilities, and members of other ethnic and cultural groups to the economic, political, and social development of California and the nation.⁶

Local governing boards must adopt only instructional materials that the board determines accurately portray the cultural and racial diversity of our society, including the contributions of all the groups identified above.⁷

Prohibited Instruction and Instructional Materials

California law prohibits the following with respect to instruction and instructional materials:

³ Cal. Educ. Code § 220; 42 U.S.C. §§ 2000d *et seq.*

⁴ Cal. Educ. Code § 33315(a)(1)(F).

⁵ Cal. Educ. Code §§ 51933-51934

⁶ Cal. Educ. Code § 51204.5

⁷ Cal. Educ. Code §§ 240, 60040.

May 30, 2023

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- Instruction must not promote a discriminatory bias on the basis of race or ethnicity, gender, religion, disability, nationality, or sexual orientation or any other protected characteristic.⁸
- A local governing board must not adopt instructional materials that contain any matter reflecting adversely upon persons on the basis of race or ethnicity, gender, religion, disability, nationality, or sexual orientation or because of any other protected characteristic.⁹

It is recommended that this memo be reviewed by superintendents, principals, administrators, and the LEA officer appointed to ensure compliance with the educational equity and nondiscrimination requirements.¹⁰

Additional Information on the California Department of Education Website

Instructional materials adopted by the California State Board of Education:

<https://www.cde.ca.gov/ci/cr/cf/caadoptinstrmaterials.asp>.

Guidelines for Piloting Instructional Materials:

<https://www.cde.ca.gov/ci/cr/cf/imagen.asp>.

Standards for Evaluating Instructional Materials for Social Content:

<https://www.cde.ca.gov/ci/cr/cf/lc.asp>. Abridged version:

<https://www.cde.ca.gov/ci/cr/cf/abridgedsocialcontent.asp>.

If you have further questions regarding this communication, please contact Dr. Mike Torres, Director, Curriculum Frameworks and Instructional Resources Division, at mtorres@cde.ca.gov.

Sincerely,

Cheryl Cotton

Cheryl Cotton, Deputy Superintendent
Instruction, Measurement, and Administration Branch

CC:tm

⁸ Cal. Educ. Code § 51500.

⁹ Cal. Educ. Code § 51501.

¹⁰ Cal. Educ. Code § 234.1(g); Cal. Educ. Code § 200 et seq.; Title 5, California Code of Regulations, § 4900 et seq.





Capital Improvement Plan (CIP)

Oak Valley Elementary School

**Rural Community
Assistance Corporation**



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1 Executive Summary

Oak Valley Elementary is a public school located in Tulare, CA, which is in a fringe rural setting. The student population of Oak Valley Elementary is 571 and the school serves K-8. At Oak Valley Elementary, 34% of students scored at or above the proficient level for math, and 48% scored at or above that level for ELA. The school's minority student enrollment is 81%. The student-teacher ratio is 19. The student population is made up of 52% female students and 48% male students. The school enrolls 77% economically disadvantaged students. There are 33 equivalent full-time teachers.

Oak Valley Union Elementary School District (OVUESD) requested that Rural Community Assistance Corporation (RCAC) complete a Capital Improvement Plan to evaluate the drinking water system at Oak Valley Elementary School in preparation for eventual upgrades, repair, or replacement of system components. The recommendations provided will assist the board in making prudent financial decisions and ensure the school's long-term viability.

The primary objective of this process is to ensure that the district can allocate sufficient funds to develop, construct, operate, maintain, and manage its drinking water system on a continuing basis, in full compliance with federal, state, and local requirements.

With most of the system (based on costs) being around 10 years old, it is important for OVUESD to begin preparing for asset replacement. The well, well pumps, treatment system and distribution piping are the most critical assets in the system and timely replacement of these assets is crucial.

2 Introduction

2.1 RCAC

Founded in 1978, RCAC provides training, technical, and financial resources and advocacy so rural communities can achieve their goals. Since 1978, our dedicated staff and active board, coupled with our key values: leadership, collaboration, commitment, quality, and integrity, have helped effect positive change in rural communities across the West.

An asset management plan has been requested by OVUESD under the State Water Resources Control Board SAFER Program. This plan is being developed and may be used if applying for Drinking Water State Revolving Fund dollars and other funding opportunities. The purpose of this plan is for OVUESD to identify critical assets and make decisions regarding priority replacements and funding. This plan consists of a comprehensive asset inventory list that has been analyzed based on the condition, performance, and criticality of each asset. It can assist OVUESD in improving their water system by allowing WWSD to develop a financial plan that includes expected future maintenance and construction costs. It is a planning tool that is non-binding and should be reviewed and updated regularly as conditions change. This will ensure that WWSD can continue to deliver safe and affordable drinking water to its customers into the extended future.

2.2 Purpose of Capital Improvement Plan (CIP)

This Capital Improvement Plan (CIP) has been prepared for Oak Valley Elementary School in compliance with the Drinking Water State Revolving Fund (DWSRF) requirements under the Water Resources reform and Development Act of 2014. This CIP will help to ensure the Oak Valley Elementary School drinking water system upholds its responsibility to maintain health, water conservation, pollution prevention measures and continue to sustain economic vitality in the community of Oak Valley Elementary School. It will demonstrate proficiency in system technical, managerial, and financial sustainability as the system ages and provide a framework for a continued review of the overall condition of the drinking water system. This CIP will also serve as a tool that can be implemented to ensure that DWSRF loan recipients maintain a desired level of lowest level life cycle cost.

2.3 Board Responsibilities

The Oak Valley Union School District, Board of Trustee's, or designate, is charged with managing the drinking water system in a sustainable, and financially responsible manner. The Board must ensure the system complies with all applicable Federal, State, and Local regulations and other laws protecting the health of its customers and the environment.

2.4 Guiding Principles of a CIP

This Oak Valley Elementary School water system CIP will include an inventory of critical assets, an evaluation of the asset's condition and prioritization for replacement, an evaluation of the water and energy conservation efforts employed by the system, and a final certification the plan was completed in accordance with the Drinking Water State Revolving Fund requirements.

2.5 Disclaimer

The findings, recommendations, and conclusions contained in this financial analysis are based on financial information provided to RCAC by Oak Valley Union Elementary School District. Although reasonable care was made to assure the reliability of this information, no warranty is expressed or implied as to the correctness, accuracy, or completeness of the information contained herein. Any action taken based on such findings, recommendations, or conclusions is undertaken at the discretion of Oak Valley Union Elementary School District. In no event will RCAC or its partners, employees, or agents, be liable for any decision made or action taken in reliance on the information contained in this analysis.

3 Asset Inventory, Condition & Performance

3.1 Asset Inventory (attached as Appendix A)

This inventory will help identify or estimate the assets':

- Age
- Expected useful life
- Condition
- Service history
- Adjusted useful life
- Remaining useful life

Accounting for the assets can be done through record drawings, staff knowledge, and visual observations. Determine the expected useful life by using operator or manufacturer's recommendations. Some estimated useful lives from the EPA Asset Management Handbook are provided. You can then calculate an adjusted useful life by considering the service history and current condition of the asset.

The Asset Inventory on the following page is an example worksheet that accounts for essential components associated with the project. A component is normally considered an asset if it has a replacement cost greater than \$5,000, has a useful life greater than a year, or is critical to the delivery of process, compliance of regulatory standards or provision of safety measures. Once assets are identified, the criticality of assets will be assessed in Section 2.2.

Asset	Expected Useful Life (years)
Intake Structures	35-45
Wells and Springs	25-35
Galleries and Tunnels	30-40
Chlorination Equipment	10-15
Other Treatment Equipment	10-15
Storage Tanks	30-60
Pumps	10-15
Buildings	30-60
Electrical Systems	7-10
Transmission Mains	35-40
Distribution Pipes	35-40
Valves	35-40
Blow-off Valves	35-40
Backflow Prevention	35-40
Meters	10-15
Service Lines	30-50
Hydrants	40-60
Office Furniture/Supplies	10
Computers	5
Transportation Equipment	10

Note: These numbers are ranges of expected useful lives drawn from a variety of sources. The ranges assume that assets have been properly maintained.

3.1.1 Asset List by Remaining Life

The school's water system assets would cost \$779,200 to replace today. Assets of the system are expected to last for another 0-34 years, depending on the asset. This is known as the asset's estimated remaining life. When costs are inflated to match the estimated remaining life, the

school should be prepared to pay \$977,989 to replace all their assets as needed. The school should be prepared to spend \$324,821 in the next five years to replace assets that are reaching the end of their estimated useful life

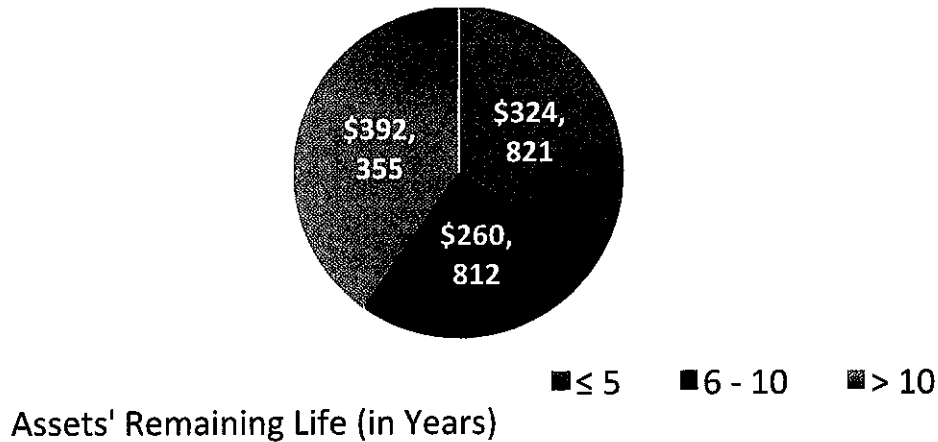


Figure 1 - Cost to Replace Assets (future costs) at End of Remaining Life, by age class

The well water pump, well head, and fire system control breaker box are the assets at the end of their estimated remaining useful life.

Table 1: Remaining Life Table

Asset	Install Date	Asset Condition	Estimated Remaining Useful Life	Estimated Future Cost
Water pump (well)	2000	Fair	0	\$1,750
Well Head	2000	Good	0	\$150,000
Fire System Control Breaker Box (former diesel pump station)	2000	Fair	0	\$20,000
Sodium Hypochlorite Chemical Tank (fiberglass, white)	2013	Fair	2	\$1,570
Fire Tank Chlorine Dosing Pump 1-Auto	2013	Good	2	\$3,140
Fire Tank Chlorine Dosing Manual 1	2013	Good	2	\$3,140
Fire Tank Chlorine Controller	2013	Good	2	\$2,093
Chemical Solution Container	2013	Fair	2	\$1,570
Chemical Injection Saddles (2) 3/4"	2013	Fair	2	\$2,093
Well Strainer	2013	Unknown	2	\$3,140
Pump House (well)	2000	Fair	3	\$5,888
Chlorine Dosing Pump	2015	Good	3	\$2,141
Vehicle (50% water)	2026	Unknown	3	\$29,441
Ferric Chloride Mixer	2015	Good	4	\$4,929
Stenner Pump Control Module	2015	Good	4	\$1,314

Flow Meter Well Discharge 3"	2013	Unknown	4	\$4,381
Piping ~4420ft; 3/4", 1", 1.5", 2", & 4" (galvanized and pvc)	2015	Fair	5	\$840
5 HP Filter Pump 1	2015	Good	5	\$7,283
5HP Booster Pump 2	2015	Good	5	\$7,283
Filter Line Actuator 2"	2013	Good	5	\$3,361
Filter Line Actuator 2"	2013	Good	5	\$3,361
Filter Line Actuator West	2013	Good	5	\$3,361
Filter Line Actuator 2" west upper	2013	Good	5	\$3,361
Pressure Reducing valve	2013	Fair	5	\$1,681
West Side Filter (effluent conductivity) Analyzer	2013	Good	5	\$2,241
East Side Filter (effluent) Analyzer	2013	Good	5	\$2,241
Filter Media PLC	2015	Good	5	\$11,204
Fire Tank Booster Pump Chemical Feed 3hp	2013	Good	5	\$5,602
Check Valve Fire Tank	2013	Fair	5	\$5,042
Chlorine Dosing Pump 2 - Auto Fire Tank	2013	Good	5	\$3,361
Chlorine Dosing Pump 2 - Manual Fire Tank	2013	Good	5	\$3,361
Pressure Vessel	2013	Unknown	5	\$11,204
Well Pump	2013	Unknown	5	\$6,722
Fire System Valve Actuators	2000	Fair	5	\$6,722
Storage tank (12k)	2000	Fair	6	\$25,216
Retention/Mineral Tank (fiberglass, black)	2014	Good	6	\$5,158
Domestic Water 5hp Pump	2015	Good	6	\$7,450
Transformer Domestic Booster pump	2013	Good	6	\$5,731
Chlorinator	2015	Fair	7	\$1,173
Flow Meter East Side 3"	2015	Good	7	\$4,104
Flow Meter West Side 3"	2015	Good	7	\$4,104
Backwash Tank	2013	Good	7	\$11,725
Air Relief Valve West 1"	2013	Fair	8	\$300
Air Relief Valve	2013	Fair	8	\$300
Cafeteria Fire Riser Alarm Valve	2015	Fair	8	\$5,998
Wilkins 975XL RP	2015	Good	10	\$1,883
Chemical Analyzer Filter Media-Free Chlorine	2013	Good	10	\$31,383
Filter Media Tank West (fiberglass, brown)	2015	Good	10	\$5,021
Filter Media Tank East (fiberglass, brown)	2015	Good	10	\$5,021
2' RP Fire tank fill line	2013	Good	10	\$1,883
Domestic Water Tank	2013	Fair	10	\$125,533
Fire System Jockey Pump Electrical Box	2000	Poor	10	\$18,830
Electrical Panel Booster Pump Domestic	2013	Good	12	\$19,706
3" Braided Piping Tank Overfill Fire Tank	2013	Good	12	\$5,255
8' Braided Piping x2 Inlet/Outlet Fire tank	2013	Good	12	\$21,020
3' Braided Piping Fill Line	2013	Good	12	\$5,255
Pressure Vessel	2015	Fair	14	\$2,062

Fire Check Valve	2021	Good	14	\$10,999
Electrical Control Panel	2000	Good	15	\$21,097
Chemical Feed Cabinet with Instrumentation	2013	Good	15	\$21,097
Electrical Control Panel	2013	Good	15	\$35,162
Hydrants (4)	2000	Fair	16	\$17,266
Tank Fire	2013	Good	20	\$157,584
Water Well	2015	Fair	26	\$27,093
Fire pump	2015	Fair	26	\$27,093
Pump House (treatment)	2015	Fair	34	\$21,666
TOTAL				\$977,989

3.1.2 Asset Replacement Reserves

To replace the assets at the time each asset reached the estimated remaining useful life, the school needs to set aside \$83,686 per year. Equipment may fail prior to the estimated remaining useful life so the school may want to consider setting aside more per year to ensure it has ample reserves to ensure the operation of its water system. Additionally, it is important to keep in mind that \$171,750 worth of assets are at the end of their useful life currently.

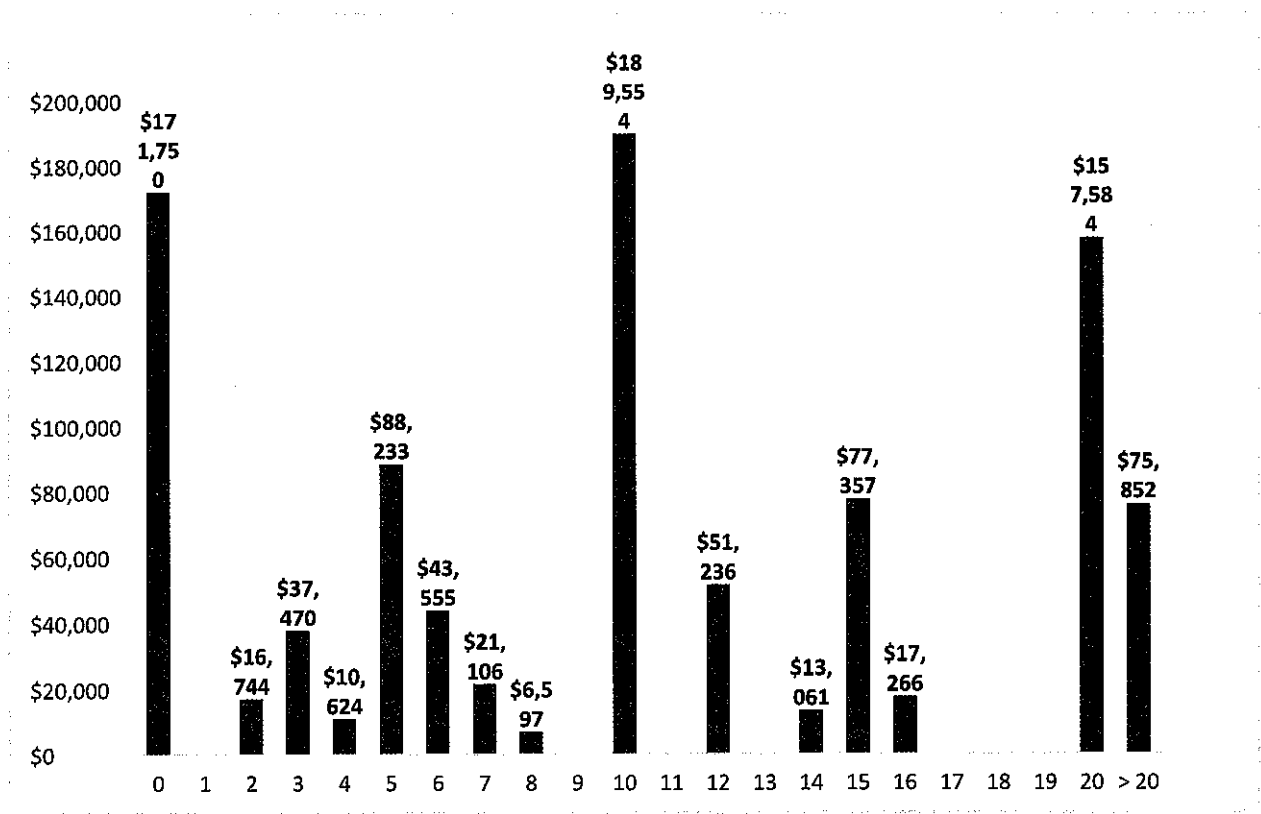


Figure 2- Cost to Replace Assets (future costs) at End of Remaining Life, by year

3.2 Process for Determining Criticality and Prioritization of Assets

Guidance is provided in the following tables for the assessment of the condition of assets, probability of failure (PoF), and the consequence of failure (CoF). Ratings and remaining useful life for each asset

are selected based on physical inspection, consultation with utility operators, references to operation and maintenance (O&M) manuals, and experience with similar assets.

Ratings are entered to determine each asset's criticality and therefore priority.

Condition Assessment	
Condition Rating	Description
1	New or Excellent Condition – Only normal maintenance required
2	Minor Deterioration – Requires minor maintenance
3	Moderate Deterioration – 10-20% requires significant maintenance
4	Significant Deterioration – 20-40% requires renewal/upgrade
5	Unserviceable/End of useful life – Over 50% of asset requires replacement

Probability of Failure (PoF)	
PoF Rating	Description
1	Improbable – So unlikely, it can be assumed failure may not be experienced
2	Remote – Unlikely but possible to occur within the life of the asset
3	Occasional – Likely to occur sometime in the life of the asset
4	Probable – Will occur several times in the life of an asset
5	Imminent – Likely to occur in the life of the asset

Consequence of Failure (CoF)	
CoF Rating	Description
1	Insignificant disruption
2	Minor disruption
3	Moderate disruption
4	Major disruption
5	Catastrophic disruption

Criticality	
Criticality Rating	Description
1-8	Not considered a critical rating
9-16	Important but not critical
>16	Critical rating

Criticality					
PoF	CoF				
	1	2	3	4	5
	2	4	6	8	10
	3	6	9	12	15
	4	8	12	16	20
	5	10	15	20	25

3.2.1 Criticality of Assets

No assets in the water system meet the numerical criteria of "Critical." However, there are several assets that are considered important such as the water well, well water pump, pressure vessel, sodium hypochlorite chemical tank, and chemical solution container.

Table 2: Criticality Table

Asset	PoF	CoF	Redundancy	Criticality	Criticality Rating
N/A	N/A	N/A	N/A	>16	Critical
Water Well	3	5	1	15	Important
Water pump (well)	3	5	1	15	Important
Pressure Vessel	3	5	1	15	Important
Sodium Hypochlorite Chemical Tank (fiberglass, white)	3	5	1	15	Important
Chemical Solution Container	3	5	1	15	Important
Well Pump	3	5	1	15	Important
Well Strainer	3	4	1	12	Important
Fire System Jockey Pump Electrical Box	4	3	1	12	Important
Chlorinator	2	5	1	10	Important
Chlorine Dosing Pump	2	5	1	10	Important
Wilkins 975XL RP	2	5	1	10	Important
Chemical Analyzer Filter Media-Free Chlorine	2	5	1	10	Important
Domestic Water 5hp Pump	2	5	1	10	Important
Fire Tank Chlorine Controller	2	5	1	10	Important
Domestic Water Tank	2	5	1	10	Important
Well Head	2	5	1	10	Important
Pressure Vessel	2	5	1	10	Important
Cafeteria Fire Riser Alarm Valve	3	3	1	9	Important
Stenner Pump Control Module	2	4	1	8	Not Critical
Air Relief Valve West 1"	2	4	1	8	Not Critical
Air Relief Valve	2	4	1	8	Not Critical
Backwash Tank	2	4	1	8	Not Critical
Electrical Panel Booster Pump Domestic	2	4	1	8	Not Critical
Fire Tank Booster Pump Chemical Feed 3hp	2	4	1	8	Not Critical
Check Valve Fire Tank	2	4	1	8	Not Critical
Transformer Domestic Booster pump	2	4	1	8	Not Critical
Chemical Injection Saddles (2) 3/4"	3	5	0.5	7.5	Not Critical
Electrical Control Panel	2	3	1	6	Not Critical
Pressure Reducing valve	2	3	1	6	Not Critical
Retention/Mineral Tank (fiberglass, black)	2	3	1	6	Not Critical
Tank Fire	2	3	1	6	Not Critical

Chlorine Dosing Pump 2 - Auto Fire Tank	2	3	1	6	Not Critical
Chlorine Dosing Pump 2 - Manual Fire Tank	2	3	1	6	Not Critical
Fire System Control Breaker Box (former diesel pump station)	3	2	1	6	Not Critical
Fire System Valve Actuators	3	2	1	6	Not Critical
Fire Check Valve	2	3	1	6	Not Critical
Piping ~4420ft; 3/4", 1", 1.5", 2", & 4" (galvanized and pvc)	2	5	0.5	5	Not Critical
Filter Media Tank West (fiberglass, brown)	2	5	0.5	5	Not Critical
Filter Media Tank East (fiberglass, brown)	2	5	0.5	5	Not Critical
Fire Tank Chlorine Dosing Pump 1-Auto	2	5	0.5	5	Not Critical
Ferric Chloride Mixer	2	2	1	4	Not Critical
Flow Meter East Side 3"	2	2	1	4	Not Critical
Flow Meter West Side 3"	2	2	1	4	Not Critical
West Side Filter (effluent conductivity) Analyzer	2	4	0.5	4	Not Critical
East Side Filter (effluent) Analyzer	2	4	0.5	4	Not Critical
Filter Media PLC	2	4	0.5	4	Not Critical
3" Braided Piping Tank Overfill Fire Tank	2	2	1	4	Not Critical
3' Braided Piping Fill Line	2	2	1	4	Not Critical
Flow Meter Well Discharge 3"	2	2	1	4	Not Critical
Fire pump	1	3	1	3	Not Critical
Hydrants (4)	1	3	1	3	Not Critical
5 HP Filter Pump 1	2	3	0.5	3	Not Critical
5HP Booster Pump 2	2	3	0.5	3	Not Critical
Fire Tank Chlorine Dosing Manual 1	2	3	0.5	3	Not Critical
2' RP Fire tank fill line	2	3	0.5	3	Not Critical
Vehicle (50% water)	3	1	1	3	Not Critical
Storage tank (12k)	1	5	0.5	2.5	Not Critical
Pump House (treatment)	1	2	1	2	Not Critical
Pump House (well)	1	2	1	2	Not Critical
Filter Line Actuator 2"	2	2	0.5	2	Not Critical
Filter Line Actuator 2"	2	2	0.5	2	Not Critical
Filter Line Actuator West	2	2	0.5	2	Not Critical
Filter Line Actuator 2" west upper	2	2	0.5	2	Not Critical
Chemical Feed Cabinet with Instrumentation	2	2	0.5	2	Not Critical
8' Braided Piping x2 Inlet/Outlet Fire tank	2	2	0.5	2	Not Critical

Electrical Control Panel	1	3	0.5	1.5	Not Critical
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3.2.2 Prioritization of Assets

Assets are property owned by OVES that have value and availability to meet the commitment of providing safe and reliable drinking water to its customers. Asset categories were taken from AWIA Sections 2013(a) to ensure a complete asset inventory list was developed. The categories are as followed:

- 1) Physical barriers – physical security to protect the water supply and water system
- 2) Source water – all sources that supply water
- 3) Water Intake and conveyances (Raw water) – infrastructure that collects and transports water from a source to a treatment or distribution facility
- 4) Pretreatment and Treatment – unit processes that ensure water meets regulatory public health and aesthetic standards
- 5) Storage and distribution facilities (S&D) – infrastructure used to store water after treatment and distribute to customers
- 6) Electronic computers and other automated systems - treatment and distribution process control systems; business enterprise information technology, communications systems, and equipment used to secure such systems
- 7) Monitoring practices (MP)- processes used to monitor source water and finished water quality, sensors, warning systems, laboratory resources, and data management equipment
- 8) Financial infrastructure - equipment and systems used to operate and manage utility finances
- 9) Chemical storage and handling - storage facilities used for chemical disinfection and treatment
- 10) Operations and maintenance (O&M) – additional equipment and supplies needed to operate and maintain the water system

The priority projects for the school follow the criticality table, as the most important (critical) assets have no redundancy. It should be noted that the Fire System Control Breaker Box has a low priority (28) due to its low PoF and CoF but is at the end of its estimated remaining life and replacement should be considered if the budget allows.

Table 3: Prioritization Table

Asset	Criticality	Redundancy	Priority	Estimated Current Cost
-------	-------------	------------	----------	------------------------

Water Well	15	1	1	\$15,000
Water pump (well)	15	1	1	\$1,750
Pressure Vessel	15	1	1	\$1,500
Sodium Hypochlorite Chemical Tank (fiberglass, white)	15	1	1	\$1,500
Chemical Solution Container	15	1	1	\$1,500
Well Pump	15	1	1	\$6,000
Well Strainer	12	1	7	\$3,000
Fire System Jockey Pump Electrical Box	12	1	7	\$15,000
Chlorinator	10	1	9	\$1,000
Chlorine Dosing Pump	10	1	9	\$2,000
Wilkins 975XL RP	10	1	9	\$1,500
Chemical Analyzer Filter Media-Free Chlorine	10	1	9	\$25,000
Domestic Water 5hp Pump	10	1	9	\$6,500
Fire Tank Chlorine Controller	10	1	9	\$2,000
Domestic Water Tank	10	1	9	\$100,000
Well Head	10	1	9	\$150,000
Pressure Vessel	10	1	9	\$10,000
Cafeteria Fire Riser Alarm Valve	9	1	18	\$5,000
Stenner Pump Control Module	8	1	19	\$1,200
Air Relief Valve West 1"	8	1	19	\$250
Air Relief Valve	8	1	19	\$250
Backwash Tank	8	1	19	\$10,000
Electrical Panel Booster Pump Domestic	8	1	19	\$15,000
Fire Tank Booster Pump Chemical Feed 3hp	8	1	19	\$5,000
Check Valve Fire Tank	8	1	19	\$4,500
Transformer Domestic Booster pump	8	1	19	\$5,000
Chemical Injection Saddles (2) 3/4"	7.5	0.5	27	\$2,000
Electrical Control Panel	6	1	28	\$15,000
Pressure Reducing valve	6	1	28	\$1,500
Retention/Mineral Tank (fiberglass, black)	6	1	28	\$4,500
Tank Fire	6	1	28	\$100,000
Chlorine Dosing Pump 2 - Auto Fire Tank	6	1	28	\$3,000
Chlorine Dosing Pump 2 - Manual Fire Tank	6	1	28	\$3,000
Fire System Control Breaker Box (former diesel pump station)	6	1	28	\$20,000
Fire System Valve Actuators	6	1	28	\$6,000
Fire Check Valve	6	1	28	\$8,000
Piping ~4420ft; 3/4", 1", 1.5", 2", & 4" (galvanized and pvc)	5	0.5	37	\$750
Filter Media Tank West (fiberglass, brown)	5	0.5	37	\$4,000

Filter Media Tank East (fiberglass, brown)	5	0.5	37	\$4,000
Fire Tank Chlorine Dosing Pump 1-Auto	5	0.5	37	\$3,000
Ferric Chloride Mixer	4	1	41	\$4,500
Flow Meter East Side 3"	4	1	41	\$3,500
Flow Meter West Side 3"	4	1	41	\$3,500
West Side Filter (effluent conductivity) Analyzer	4	0.5	41	\$2,000
East Side Filter (effluent) Analyzer	4	0.5	41	\$2,000
Filter Media PLC	4	0.5	41	\$10,000
3" Braided Piping Tank Overfill Fire Tank	4	1	41	\$4,000
3' Braided Piping Fill Line	4	1	41	\$4,000
Flow Meter Well Discharge 3"	4	1	41	\$4,000
Fire pump	3	1	50	\$15,000
Hydrants (4)	3	1	50	\$12,000
5 HP Filter Pump 1	3	0.5	50	\$6,500
5HP Booster Pump 2	3	0.5	50	\$6,500
Fire Tank Chlorine Dosing Manual 1	3	0.5	50	\$3,000
2' RP Fire tank fill line	3	0.5	50	\$1,500
Vehicle (50% water)	3	1	50	\$27,500
Storage tank (12k)	2.5	0.5	56	\$22,000
Pump House (treatment)	2	1	57	\$10,000
Pump House (well)	2	1	57	\$5,500
Filter Line Actuator 2"	2	0.5	57	\$3,000
Filter Line Actuator 2"	2	0.5	57	\$3,000
Filter Line Actuator West	2	0.5	57	\$3,000
Filter Line actuator 2" west upper	2	0.5	57	\$3,000
Chemical Feed Cabinet with Instrumentation	2	0.5	57	\$15,000
8' Braided Piping x2 Inlet/Outlet Fire tank	2	0.5	57	\$16,000
Electrical Control Panel	1.5	0.5	65	\$25,000

4 Asset Management & Fiscal Planning

4.1 Plan for Replacement, Rehabilitation, and Improvement of Project Assets

This asset management plan has been developed using a CIP model, with the assumption that assets (excluding vehicles) may be grouped into engineered projects that can receive a minimum of 85% grant funding.

The CIP model was run based on the expected remaining life of assets and the increase in the cost of replacement due to inflation (the model results are included in the appendices). The expected remaining life is only one factor that needs to be considered when developing an asset management plan. Other areas to consider in developing an asset management plan are the asset risk assessment, available funding, school district needs, and other variables.

Table 4 below indicates the assets that will need to be addressed in the next ten years. Please note that there is approximately \$171,750.00 in reserves needed for assets that are currently at the end of their useful life.

Table 4: 10-year Replacement Plan

Description	Need	Year of Need	Cost
Water pump (well)	End of Useful Life/Priority	2023	\$1,750
Well Head	End of Useful Life	2023	\$150,000
Fire System Control Breaker Box (former diesel pump station)	End of Useful Life	2023	\$20,000
Sodium Hypochlorite Chemical Tank (fiberglass, white)	Priority	2025	\$1,500
Chemical Solution Container	Priority	2025	\$1,500
Pressure Vessel	Priority	2028	\$1,500
Well Pump	Priority	2028	\$6,000
Water Well	Priority	2049	\$15,000
TOTAL			\$197,250

1.1

5 Appendix A – Asset Inventory as a separate Excel attachment

5.11

2023-2024

Supt. Pilgrim Work Calendar (222)

Non work days

July '23

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

August '23

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

September '23

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

October '23

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

November '23

S	M	T	W	T	F	S
		1	2	3	4	
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

December '23

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

January '24

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

February '24

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

March '24

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

April '24

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

May '24

S	M	T	W	T	F	S
		1	2	3	4	
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

June '24

S	M	T	W	T	F	S
					1	
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Audit Flag	EFT
012735	BUENA VISTA BUENA VISTA	PV-230806	6/15/2023		22/23-11-02 22/23-11-02		010-00000-0-11100-10000-58000-0-0000 010-58126-3-11100-10000-43000-0-0000	\$8,183.22 \$28.01		
Total Check Amount:								\$8,211.23		
013198	CLASSIC CHARTER	PV-230808	6/15/2023		160790		010-41270-3-11100-10000-58000-0-0000	\$2,744.00		
Total Check Amount:								\$2,744.00		
013760	EWING IRRIGATION PRODUCTS, INC	PV-230809	6/15/2023		19582742		010-00000-0-00000-82000-43000-0-0000	\$30.46		
Total Check Amount:								\$30.46		
013719	FRESNO CHAFFEE ZOO	PV-230810	6/15/2023		100222785		010-41270-3-11100-10000-58000-0-0000	\$265.00		
Total Check Amount:								\$265.00		
014179	GOLD STAR FOODS INC GOLD STAR FOODS INC GOLD STAR FOODS INC GOLD STAR FOODS INC	PV-230819	6/15/2023		6265675/5666/5608/60 6265675/5666/5608/60 6265675/5666/5608/60 6265675/5666/5608/60		130-53100-0-00000-37000-47000-0-0000 130-53100-0-00000-37000-47000-0-0000 130-53100-0-00000-37000-47000-0-0000 130-53100-0-00000-37000-47000-0-0000	\$183.00 \$2,222.18 \$200.74 \$767.30		
Total Check Amount:								\$3,373.22		
013930	GOPHER SPORT	PV-230811	6/15/2023		294163		010-11000-0-11100-10000-43000-0-0000	\$348.77		
Total Check Amount:								\$348.77		
014243	MADISON TAYLOR LOOP	PV-230820	6/15/2023		2023-2		010-26000-0-11100-40000-58000-0-0000	\$1,355.00		
Total Check Amount:								\$1,355.00		
014207	PRO-YOUTH PRO-YOUTH	PV-230812	6/15/2023		1794 1794		010-26000-0-11100-40000-51000-0-0000 010-26000-0-11100-40000-58000-0-0000	\$43,832.42 \$10,292.18		
Total Check Amount:								\$54,124.60		
013927	SMITH SIGM & DECAL, INC.	PV-230813	6/15/2023		5845		010-11000-0-11100-10000-43000-0-0000	\$732.38		
Total Check Amount:								\$732.38		
012478	SoCalGas	PV-230815	6/15/2023		May		010-00000-0-00000-82000-55000-0-0000	\$148.61		



Accounts Payable Final PreList - 6/15/2023 11:12:44AM

*** FINAL ***
 Batch No 459

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Flag	EFT	Audit
013607	SPENCE FENCE COMPANY	PV-230814	6/15/2023		21694/21695		010-81500-0-00000-81100-64000-0-0000	\$995.00			
	SPENCE FENCE COMPANY		6/15/2023		21694/21695		010-81500-0-00000-81100-64000-0-0000	\$995.00			
								Total Check Amount:			
								\$148.61			
013693	TULARE COUNTY SUPT. OF SCHOOLS	PV-230816	6/15/2023		232209		010-65000-0-57600-31200-58000-0-0000	\$42,262.40			A
	TULARE COUNTY SUPT. OF SCHOOLS		6/15/2023		232209		010-07200-0-00000-31200-58000-0-0404	\$68,393.60			A
								Total Check Amount:			
								\$110,656.00			
011765	VISALIA TIMES DELTA	PV-230817	6/15/2023		5631590		010-00000-0-00000-72000-58000-0-0000	\$215.48			
								Total Check Amount:			
								\$215.48			
013634	VISALIA UNIFIED SCHOOL DIST.	PV-230818	6/15/2023		2050/2058		010-07230-0-00000-36000-58000-0-0000	\$4,687.12			
	VISALIA UNIFIED SCHOOL DIST.		6/15/2023		2050/2058		010-07230-0-00000-36000-58000-0-0000	\$4,687.12			H
								Total Check Amount:			
								\$9,374.24			



Accounts Payable Final PreList - 6/15/2023 11:12:44AM

*** FINAL ***

Batch No 459

Vendor No	Vendor Name	Reference Number	Invoice Date	PO #	Invoice No	Separate Check	Account Code	Amount	Audit Flag	EFT
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Total District Payment Amount: \$193,568.99



AGREEMENT
FOR TRANSPORTATION SERVICES
BETWEEN THE VISALIA UNIFIED SCHOOL DISTRICT
AND THE OAK VALLEY UNION SCHOOL DISTRICT

This Agreement is made and entered into this 30th day of June 2023 by and between Oak Valley Union School District, hereinafter referred to as "Oak Valley Union", and the Visalia Unified School District, hereinafter referred to as "Visalia".

RECITALS

WHEREAS, Visalia is a public school district duly organized under the laws of the State of California, operating a Transportation Department capable of providing transportation services to its students; and

WHEREAS, Oak Valley Union is a public school district organized under the laws of the State of California and desires that Visalia provide transportation services for Oak Valley Union students; and

WHEREAS, Visalia is willing to provide such transportation services subject to the terms and conditions specified below.

NOW THEREFORE, the parties agree as follows:

1. **TERM.** The Initial Term of this Agreement shall commence on July 1, 2023 through June 30, 2025 and shall be renewed automatically for successive periods of one (1) year each (a "Renewal Term") after the expiration of the Initial Term and any subsequent Renewal Term, unless Oak Valley Union provides Visalia or Visalia provides Oak Valley Union, with a written notice to the contrary sixty (60) days prior to the end of the Initial Term or Renewal Term, as applicable. Each Renewal Term shall incorporate and be governed by an Amendment to the agreement for changes in the Payment or other terms and conditions upon mutual agreement between Visalia and Oak Valley Union.
2. **INDEPENDENT CONTRACTOR.** While engaged in carrying out and complying with the terms and conditions of this Agreement, Visalia is an independent contractor, and not an officer, agent, or employee of Oak Valley Union.



AGREEMENT

For Transportation Services Between Visalia Unified School District and Oak Valley Union School District

1. **(A) PAYMENT.** Oak Valley Union agrees to pay Visalia the sum of **\$50,442.76** per school year. This sum is based on the parties' anticipated home-to-school mileage of not more than 35,000 miles per school year. Should Oak Valley Union's annual home-to-school mileage exceed 35,000 miles, the excess mileage will be billed at a rate of \$5.87 per mile. Any excess home-to-school mileage charges due to Visalia shall be calculated through June 30 of the contract year, billed in July of the following contract year, and due within 30 days of Oak Valley Union's receipt of Visalia's invoice. Visalia shall bill Oak Valley Union for the current yearly fee prior to September 1. Oak Valley Union shall pay the yearly fee in ten (10) equal monthly increments of **\$5,044.28**, payable by Oak Valley Union on the 15th of each month beginning **September 15, 2023**. Visalia shall provide Oak Valley Union with a statement detailing such late payment penalties if Oak Valley Union fails to make payment by the dates specified above.

(B) Along with the monthly statement, Visalia will also provide Oak Valley Union with a monthly written status report including the number of home-to-school miles and field trip miles to date.

(C) Should the annual costs for services provided for under this agreement increase for future school years based on inflationary factors, Visalia shall forward Oak Valley Union the new rate schedules by April 1st of each year, which shall become binding when a new Amendment is signed by both parties. Said increases, if necessary, will be based on a three (3) year rolling average of the Annual Consumer Price Index (CPI) for All Urban Consumers for the most recent completed calendar year as published by the Bureau of Labor Statistics (www.bls.gov). The CPI may exceed the State revenue increases for school districts. Increases in cost for changes in service levels based on increased mileage or other factors will be based on actual cost and negotiated as needed. If Oak Valley Union disputes the proposed new rate schedule for the ensuing school year, Oak Valley Union may terminate the agreement effective June 30 of the same year providing an agreed upon increase cannot be reached.

2. **(A) SERVICES.** In consideration of the above payments, Visalia shall provide all of Oak Valley Union's school bus maintenance for the Initial Term and any subsequent Renewal Terms of this agreement. Oak Valley Union understands and agrees that Visalia will maintain Oak Valley Union's seven (7) buses.

(B) Visalia will provide training and in-service for its licensed drivers.

(C) Oak Valley Union further understands and agrees that Oak Valley Union's payments cover only bus maintenance.



AGREEMENT

For Transportation Services Between Visalia Unified School District and Oak Valley Union School District

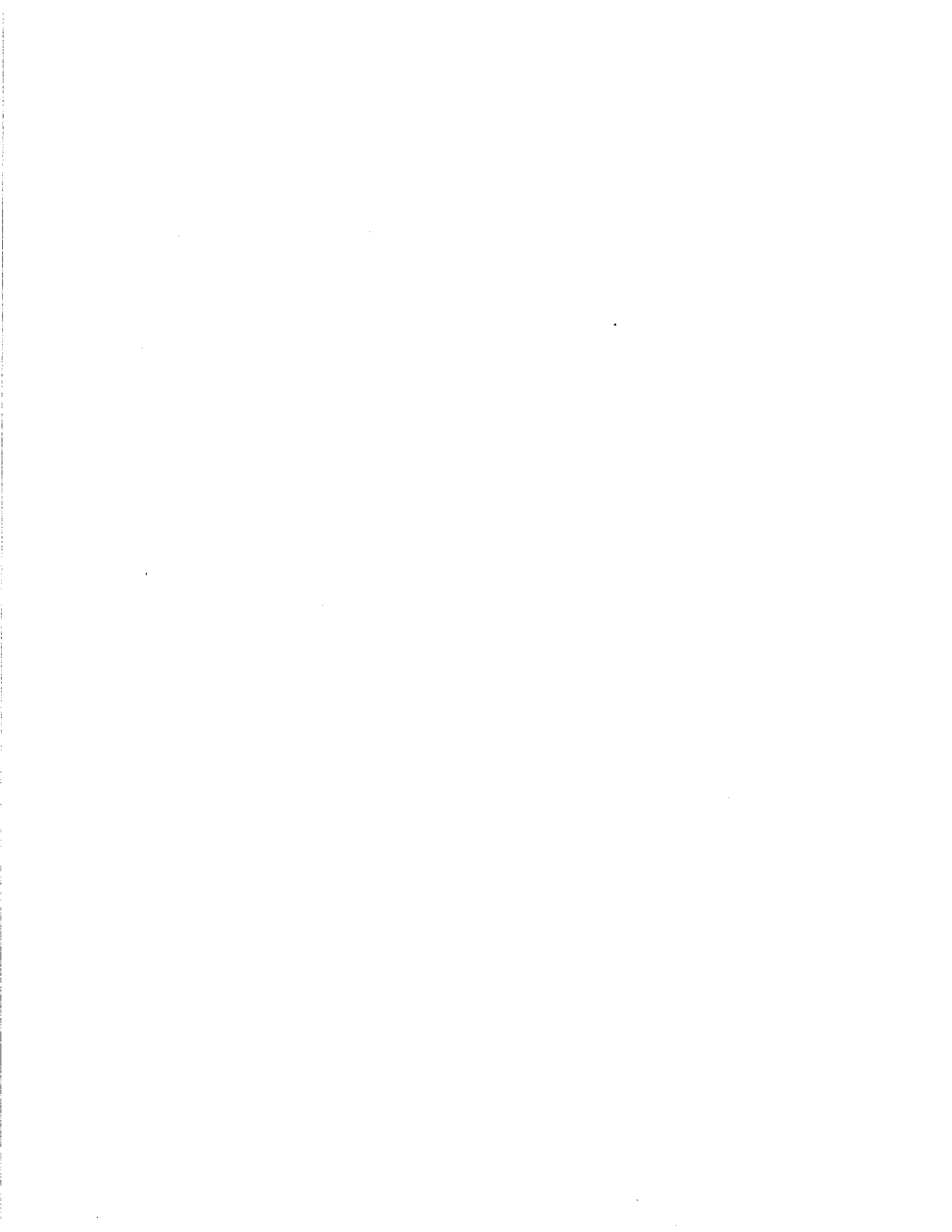
Oak Valley Union also understands that drivers for field trips and other extra-curricular trips will be provided by and compensated by Oak Valley Union. Transportation for any program or activity not specified in this Agreement will be billed as an extra-curricular trip. The mileage for field trips and extra-curricular trips are exclusive of the 35,000 miles per year home-to-school miles. The transportation charge for field and extra-curricular trips is \$2.65 per mile.

(D) Visalia will bill Oak Valley Union separately on the 15th day of each month for the preceding month's costs and services provided in connection with field and extra-curricular trip transportation. Payment for field and extra-curricular trip transportation is due 30 days after the date of Visalia's bill. Visalia shall provide Oak Valley Union with a statement detailing late payment penalties if Oak Valley Union fails to make payment as specified above. All services will be provided in accordance with current State of California regulations.

(E) Oak Valley Union should endeavor to request extra-curricular trip transportation two weeks in advance of the trip date. However, transportation can be provided when a request is made on Wednesday for the following week and Visalia can and will accommodate last minute requests if needed.

(F) Oak Valley Union trips utilizing school buses will utilize Oak Valley Union vehicles.
Visalia trip request forms will be used to request vehicles for trips.

3. **(A) USE AND MAINTENANCE OF OAK VALLEY UNION'S BUSES.** Oak Valley Union shall use any school bus Oak Valley Union would otherwise use to transport Oak Valley Union students, for the purpose of fulfilling this agreement. Visalia will utilize Oak Valley Union's buses for the transportation of only Oak Valley Union's students unless mechanical or safety issues dictate otherwise. Visalia shall inspect Oak Valley Union's buses to ensure that they are safe and in good working condition. Oak Valley Union agrees to bear the initial costs of any needed repairs to ensure the vehicles are certifiable under California Highway Patrol Motor Carrier standards. All work will be agreed to by Oak Valley Union and Visalia prior to commencement of repairs.



AGREEMENT

For Transportation Services Between Visalia Unified School District and Oak Valley Union School District

(B) Oak Valley's buses will be housed at Oak Valley's facility. Visalia shall return Oak Valley's buses in substantially the same condition as when received less ordinary wear and tear following the expiration of this agreement. Nothing in this agreement shall be construed as making Visalia liable for any normal depreciation of Oak Valley's buses during the term of this Agreement.

(C) Visalia shall, at its cost, provide routine maintenance and otherwise maintain Oak Valley's seven (7) buses in a diligent and acceptable manner to ensure the buses are certifiable by the California Highway Patrol Motor Carrier and as otherwise required by law.

(D) Visalia shall be responsible for the purchase of all fuel and gasoline required to provide pupil transportation in the performance of this Agreement. Disposal of all oils, cleaning fluids, solvents, antifreeze, and lubricants shall be the responsibility of Visalia.

(E) Visalia shall maintain appropriate vehicle records and comply with all California Highway Patrol Regulations and other applicable laws.

(F) Routine and minor repairs will be performed at Oak Valley Union's or Visalia's facility at no additional cost to Oak Valley Union. Visalia will not assume the burden of expense for major repairs above and beyond routine maintenance. For the purposes of this section, "major repairs" shall mean any parts or services that exceed \$1,000 or more per occasion. Oak Valley Union agrees to bear all the costs of any major repairs that exceed \$1,000 to ensure the vehicles are certifiable under California Highway Patrol Motor Carrier standards.

- 4. (A) MAINTENANCE OF OAK VALLEY UNION'S VEHICLES.** The charge for maintaining and repairing Oak Valley Union's vehicles, other than school buses, shall be \$90 per hour labor and Visalia's cost for parts and fuel plus 30%.

(B) Visalia shall bill Oak Valley Union separately on the 15th day of each month for the preceding month's costs for services provided to maintain and repair Oak Valley Union's vehicles. Payment for vehicle maintenance and repair is due 30 days after the date of Visalia's bill. Visalia shall provide Oak Valley Union with a statement detailing late payment penalties if Oak Valley Union fails to make payment as specified above.



AGREEMENT

For Transportation Services Between Visalia Unified School District and Oak Valley Union School District

5. **(A) INSURANCE AND INDEMNITY.** Oak Valley Union's agrees to obtain insurance providing collision and comprehensive property damage coverage and public liability coverage for all of Oak Valley Union's school buses utilized pursuant to this Agreement with policy limits of no less than fifteen million dollars (15,000,000.00). Oak Valley Union agrees to provide Visalia with an insurance endorsement showing Visalia as an additional named insured on said policy.

(B) Visalia shall indemnify, defend and hold harmless, Oak Valley Union, its officers, agents and employees, from and against any and all claims, liabilities or demands arising or alleged to arise from Visalia's performance under this agreement.

(C) Oak Valley Union shall indemnify, defend and hold harmless, Visalia, its officers, agents and employees, from and against any and all claims, liabilities or demands arising or alleged to arise from Oak Valley Union's performance under this agreement.

6. **FORCE MAJEURE.** Visalia shall be excused from performance hereunder during the time and to extent that it is prevented from performing in the customary manner by acts of God, fire, flood, strike, loss of transportation facilities, oil shortage or embargo, lockout, commandeering of materials, products, plants or facilities by the Government, or any other occurrences or circumstances which are beyond the control of Visalia, when satisfactory evidence thereof is presented to Oak Valley Union.

7. **(A) STAFFING, DRIVER TRAINING AND DRUG TESTING.** All individuals employed by Visalia for the purpose of fulfilling this agreement, shall be hired according to the provisions of the California Education Code and the California Government Code, regarding classified school employees.

(B) Visalia staff includes three state certified School Bus Driver Trainers/Instructors. Visalia will provide a minimum of the state's annual requirement of ten (10) hours of in-service training to each of the school bus drivers serving Oak Valley Union. Visalia will perform "check rides" to evaluate driver proficiency and determine whether any additional training is needed. Visalia will ensure that all bus driver-training records are current and meet all legal requirements, including all California Highway Patrol requirements.



AGREEMENT

For Transportation Services Between Visalia Unified School District and Oak Valley Union School District

8. **DEFAULT.** If default is made by Oak Valley Union in any of the covenants or conditions of this Agreement, Visalia, at its option, may terminate this Agreement upon 90 days advance written notice. Visalia agrees to continue services for 90 days or until an alternate contractor's services have been secured, whichever is less. If default is made by Visalia in any of the covenants or conditions of this Agreement, Oak Valley Union, at its option, may terminate this Agreement upon 90 days advanced written notice. If Oak Valley Union chooses to terminate the Agreement for any reason not resulting from Visalia's default, Oak Valley Union agrees to pay as liquidated damages a sum equal to three monthly payments under this Agreement within sixty (60) days of notice of termination, which payment shall constitute Visalia's entire and complete recovery after Oak Valley Union's termination.
9. **AMENDMENTS.** This Agreement cannot be changed or supplemented orally and may be modified or superseded only by written instruments executed by both parties.
10. **DISCIPLINE.** Visalia has the discretion to report serious or persistent misconduct on the part of students to the designated person employed by Oak Valley Union. Oak Valley Union shall then impose reasonable disciplinary measures upon the students in accordance with Oak Valley Union's Board Policy and applicable law.
11. **GOVERNING LAW.** This Agreement shall be governed by and construed in accordance with the laws of the State of California.
12. **BINDING EFFECT.** This Agreement is for the benefit of and shall be binding on all parties and their respective successors, heirs, and assigns.
13. **ATTORNEYS' FEES AND COSTS.** Each party shall bear his/its own attorney's fees and costs for all such fees and costs incurred prior to the date of execution of this Agreement.
14. **BREACH OF AGREEMENT.** If either party breaches this Agreement, the prevailing party shall be entitled to all damages reasonably flowing from the breach, plus attorneys' fees and cost.



AGREEMENT

For Transportation Services Between Visalia Unified School District and Oak Valley Union School District

15. **EXECUTION IN COUNTERPARTS.** This Agreement may be executed in counterparts such that the signatures may appear on separate signature pages. A copy of an original, with all signatures appended together, shall be deemed a fully executed Agreement.
16. **SEVERABILITY.** If any provision of this Agreement is held to be void, voidable, or unenforceable, the remaining portions of the Agreement shall remain in full force and effect.
17. **INTERPRETATION.** The language of all parts of this Agreement shall, in all cases, be construed as a whole, according to its fair meaning, and not strictly for or against either party.
18. **COMPLIANCE WITH LAW.** Visalia agrees to perform the services contemplated by this Agreement in a professional and a competent manner and in compliance with all state or federal laws or regulations governing the services to be rendered pursuant to this Agreement.
19. **BOARD APPROVAL.** The parties recognize that the effectiveness of this Agreement is contingent upon approval by Oak Valley Union's Governing Board and Visalia's Governing Board.
20. **OTHER DOCUMENTS/ACTS.** The parties agree to work together diligently and to execute related documents and perform related acts necessary for the successful performance of this Agreement.
21. **ENTIRE AGREEMENT.** This Agreement and its attachments, if any, constitute the entire agreement and understanding between the parties. There are no oral understandings, terms, or conditions, and neither party has relied upon any representation, express or implied, not contained in this Agreement. All prior understandings, terms or conditions are deemed merged into this Agreement and its attachments.
22. **NOTICES TO PARTIES.** All notices to be given to the parties to this Agreement shall be in writing and served by depositing same in the United States Mail, postage prepaid, registered or certified mail.



Since 1934

MORRIS LEVIN & SON, INC.

1816 S. "K" Street, Tulare, CA 93274-6842
(559) 686-8561 Contractors State Lic. 167881
www.morrislevin.com

QUOTE#	_____
PROPOSAL #	<u>26167</u>
BY	EP / SN

PROPOSAL AND CONTRACT (COMMERCIAL)

CUSTOMER NAME: OAK VALLEY UNION SCHOOL
BILLING ADDRESS: 24500 RD 68

OWNER OF PROPERTY
ADDRESS:

City TULARE	State CA	Zip 93274	City	State	Zip
TELEPHONE: (559) 688-2908	688-2908		TELEPHONE:		
DATE: 6/22/2023	70 050 4		JOB LOCATION: 24500 RD. 68		TULARE

Morris Levin & Son, Inc. is not responsible for utilities of any type below ground surface.

We propose to furnish all materials and perform all labor necessary to complete the following:

FURNISH AND INSTALL 100A SUBPANEL. PROVIDE TWO POWER OUTLETS TO ONE SHADE STRUCTURE. PROVIDE TWO POWER OUTLETS AT SECOND SHADE STRUCTURE WITH SIX STATIC FANS AND TWO LIGHT FIXTURES. ALL CONDUIT ABOVE GRADE SHALL BE METALLIC. **INCLUDES:** TRENCHING/BACKFILL, BORING, CONDUIT, SUB PANEL, BREAKERS, BACKBOARD, MSB BREAKER, WIRE TERMINATION, BONDS. **EXCLUDES:** PATCH/PAINT, CUT/DEMO/PATCHING OF CONCRETE/ASPHALT, PERMITS/INSPECTIONS. MLS DIR# 1000005166/ LIC#167881/TULARE COUNTY
All warranty work to be completed during regular business hours

This proposal is void unless accepted by 06-Jul-23. All work to be done in conformance with State and County codes and standard practices. Price includes all sales tax, labor and materials. Price does not include permits or bonds unless specified. The above work shall be completed for the sum of FIFTY-FOUR THOUSAND SEVENTY-THREE Dollars (\$ 54,073) which shall be paid as follows:

Any alteration or deviation from the above specifications involving extra cost of material or labor will only be executed upon written orders for same and will become an extra charge over the contract price. **SEE REVERSE FOR ADDITIONAL TERMS AND NOTICES.**

MORRIS LEVIN & SON, INC.

SIGNATURE

PLEASE PRINT NAME

ELIAS PEREZ

ACCEPTANCE

You are hereby authorized to furnish all materials and labor required to complete the work mentioned in the above proposal, for which _____ agree to pay the amount stated in said proposal, and according to the terms thereof. I also acknowledge receipt of Mechanics' Lien Law Notice on reverse side.

CUSTOMER SIGNATURE _____

PLEASE PRINT NAME _____

Date _____

