BOARD COMMUNICATIONS – AUGUST 07, 2020

TO: Members of the Board of Education
FROM: Superintendent, Robert G. Nelson, Ed.D.

SUPERINTENDENT – Robert G. Nelson, Ed.D.
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ADMINISTRATIVE SERVICES – Ruth F. Quinto, Deputy Superintendent/CFO
AS-1  Kim Kelstrom  School Services Weekly Update Reports for July 31, 2020
AS-2  Ruth F. Quinto  2020/21 State Adopted Budget Update
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HUMAN RESOURCES/LABOR RELATIONS – Paul Idsvoog, Chief HR/LR Officer
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HR-4  Karin Temple/Paul Idsvoog  Revised/New Job Descriptions for Maintenance and Operations Department Positions

OPERATIONAL SERVICES – Karin Temple, Chief Operations Officer
OS-1  Karin Temple  Bond-Related Recommendations on August 12, 2020 Board Meeting Agenda
OS-2  Karin Temple  Meal Distribution Program – Starting August 17, 2020

SCHOOL LEADERSHIP – Kim Mecum, Chief Academic Officer
SL-1  Jeremy Ward  Career Technical Education Facilities
From the Office of the Superintendent
To the Members of the Board of Education
Prepared by: Robert G. Nelson, Superintendent
Cabinet Approval:

Regarding: Superintendent Calendar Highlights

The purpose of this communication is to inform the Board of notable calendar items:

- Spoke at the Principal’s Institute
- Attended Fresno Downtown Rotary Meeting
- Gave interview with Kalie Hunt, KSEE 24, regarding the strategic plan for opening schools
- Held meetings with labor partners
- Held meetings with Executive Cabinet
- Gave interview with Marilyn Cowley, KMPH 26, for Lifestyle Matters regarding the opening of schools
- Met with district staff and Dr. Tameka McGlawn regarding the African American Academic Acceleration Task Force
- Attended the Fresno County School Trustees Association webinar
- Met with Diana Carbray, Boys and Girls Club, to discuss potential partnership
- Gave interview for Central Valley Today, KSEE 24, regarding opening of schools
- Participated in the Council of the Great City Schools Superintendents weekly call
- Presented at the Fresno County COVID-19 Weekly Agency CBO call on opening of schools
- Participate in Fresno County Reopening of Schools weekly meeting
- Participated in KMPH Town Hall Meeting: The Path Forward: Returning to School

Approved by Superintendent
Robert G. Nelson Ed.D.  Date: 08/07/2020
From the Office of the Superintendent  
To the Members of the Board of Education  
Prepared by: Kim Kelstrom, Executive Officer  
Cabinet Approval:  

Regarding: School Services Weekly Update Report for July 31, 2020  

The purpose of this communication is to provide the Board a copy of School Services of California’s (SSC) Weekly Update. Each week SSC provides an update and commentary on different educational fiscal issues. In addition, they include different articles related to education issues.  

The SSC Weekly Update for July 31, 2020 is attached and includes the following articles:  

- Legislature Returns from Summer Recess to a Reduced Workload – July 31, 2020  
- Hold Harmless Does Not Translate to Flat Funding – July 29, 2020  
- California Charter Schools Sue State for Not Funding Additional Students This Year – July 29, 2020  
- Schools Scramble To Teach Teachers How To Educate Virtually – July 29, 2020  

If you have any questions or require further information, please contact Kim Kelstrom at 457-3907.
DATE:    July 31, 2020  
TO:       Robert G. Nelson  
          Superintendent  
AT:       Fresno Unified School District  
FROM:     Your SSC Governmental Relations Team  
RE:       SSC's Sacramento Weekly Update  

Legislature Returns from Summer Recess to a Reduced Workload

The California State Legislature returned from its summer recess on Monday with just over a month to go before the 2019–20 Legislative Session comes to a close. Before the Legislature left for its recess there were approximately 700 bills still active for consideration. However, that number has begun to significantly decrease as legislative leadership has requested members to reduce their bill load even further in order to minimize the number of policy committee hearings given the contracted time left for the Legislature to complete its work because of COVID-19. Committee chairs have also begun to use their discretion to reduce hearing agendas by deciding which bills should be prioritized during this last stretch of the year and which measures should be held.

This was made clear at the Senate Education Committee hearing on Wednesday where committee chair Connie Leyva (D-Chino) stated that she had been working with authors on reducing the hearing agenda to include only bills that address the immediate needs of students, schools, and colleges and that do not add considerable costs or additional responsibilities. The committee approved a dozen bills including the following:

- Assembly Bill (AB) 123 (McCarty, D-Sacramento) would make a number of changes to the state’s early childhood education programs including deeming recipients of Medi-Cal or CalFresh as eligible for subsidized child care, authorizing state preschool programs to serve younger two-year-olds, and requiring the California Department of Education (CDE) to allow state preschool programs and general child care providers to serve children 12 and younger in a commingled classroom

- AB 908 (O’Donnell, D-Long Beach) would authorize a school district to extend its probationary period for students to demonstrate satisfactory progress for purposes of extracurricular activities through the conclusion of the 2020–21 school year, authorize documentation required for purposes of student work permits to be submitted electronically during an extended school closure, and prohibit a work permit from being denied based on a student’s grades, grade point average, or school attendance when the student’s school has been physically closed for an extended time
- AB 1350 (Gonzalez, D–San Diego) would authorize a local educational agency (LEA) to retroactively grant a high school diploma to a person who was in their senior year of high school during the 2019–20 school year, in good academic standing as of March 1, 2020, and was unable to complete the statewide graduation requirements due to COVID-19.

- AB 1835 (Weber, D–San Diego) would require unspent supplemental and concentration funds be used in subsequent years to increase and improve services for the unduplicated pupils that generate those funds.

- AB 2126 (O’Donnell) would require the CDE to develop and implement a website, app, and survey to collect temporary school closure information from LEAs including whether they have a plan to provide meals and instruction during school closures lasting longer than five school days.

While Senator Leyva did not explicitly say that this will be the only hearing to consider education bills that have been approved by the lower-house, there is a strong possibility that any education bill from Assemblymembers that was not included on Wednesday’s agenda will not be moving forward this year. Senator Leyva will have until Saturday, August 15, 2020, the Senate’s updated policy committee deadline, to decide whether another hearing is warranted.

The Assembly Education Committee, chaired by Assemblymember Patrick O’Donnell, will be considering education bills approved by the Senate this upcoming Monday, August 3. However, there are currently only two bills scheduled to be heard, Senate Bill (SB) 614 (Rubio, D–Baldwin) and SB 884 (Dodd, D–Napa). SB 614 would replace the Reading Instruction Competence Assessment requirement for prospective teachers and direct the Commission on Teacher Credentialing to ensure that all approved teacher preparation programs instruct and reliably assess candidates by July 1, 2022. SB 884 would add public safety power shutoffs to the list of emergencies for which a district’s average daily attendance is held harmless.

There are still many unknowns as to how many bills the Legislature will approve before the end of the legislative session. What is known, however, is that the Legislature only has until midnight of Monday, August 31, 2020, to send bills to Governor Gavin Newsom for his consideration. One exception to this deadline is if the Governor calls a special session, which may become necessary to consider how to allocate any new federal stimulus funding approved by Congress if they are able to come to an agreement on a new relief package before they recess on August 10.

**Millionaires Tax Introduced by the Legislature**

When the Legislature returned on Monday, 15 Assembly Democrats introduced a new tax proposal that would raise rates on taxable income over $1 million. Specifically, AB 1253 (Santiago, D–Los Angeles) would impose higher taxes (in addition to the existing ones) at the following income levels:

- 1% tax on income above $1 million
- 3% tax on income over $2 million
- 3.5% tax on income over $5 million

The bill is projected to raise an additional $6.8 billion annually and would provide billions of dollars to education and other governmental services, but will face an uphill battle in the Legislature especially in the current economic environment.
Since AB 1253 is a tax measure, it needs to clear a supermajority threshold (a two-thirds vote of members) in both houses of the Legislature. While the Democrats have the votes required to raise taxes, many moderate Democrats may be uneasy supporting a tax increase especially after Senator Josh Newman was recalled by voters in 2018 for his support of SB 1 (Chapter 5/2017), which raised the state’s gas and diesel taxes. However, since this tax proposal would only affect millionaires, while the gas tax affected all Californians, moderate Democrats might be more inclined to support the measure than if it was a regressive tax proposal.

*Leilani Aguinaldo*
Hold Harmless Does Not Translate to Flat Funding

By Brianna García and Matt Phillips, CPA
School Services of California Inc.’s Fiscal Report
July 29, 2020

The Budget Summary of the Enacted State Budget called for a “hold harmless for the purpose of calculating apportionment in the 2020–21 fiscal year,” which many people read as flat funding for all local educational agencies (LEAs) from 2019–20 to 2020–21. However, the devil is always in the details, and this reference in the Budget Summary may not mean what many think it means.

Amidst the pandemic, and paradigm shift from in-person to distance learning, the Legislature amended the attendance reporting windows in 2019–20 to head-off any unwarranted decreases in attendance due to the pandemic. As part of the Enacted State Budget, the newly created Education Code Section (EC §) 43502 was introduced. Subsection (b) requires the California Department of Education (CDE) to use actual attendance reported at the 2019–20 Second Principal Apportionment and Annual Apportionment reporting periods as the basis for funding in 2020–21. This has different implications for districts that are growing versus those that are declining.

Growing LEAs

This is not at all a hold harmless, but instead, a maintenance of status quo in the face of increased expenditures. LEAs that will be experiencing a growth in enrollment and average daily attendance (ADA) will likely need to increase expenditures for additional staff, instructional materials, and capacity in facilities. With no additional revenues to offset these expenditures, growing LEAs will need to look to their reserves to fund these costs for 2020–21.

Declining LEAs

Prior to the 2020–21 Enacted State Budget, a provision in the Education Code allowed school districts with declining ADA to use the higher of prior-year or current-year attendance as the basis of funding for the current year. While the ADA funding provision in the 2020–21 State Budget provides a protection for charter schools that do not have the ability to access this existing statutory protection, the addition of EC § 43502 does not offer school districts greater protection in 2020–21 than that to which they were already entitled. However, it does provide an added layer of protection in the 2021–22 fiscal year.

In 2021–22, absent the addition of EC § 43502, a school district experiencing a decline in ADA would rely on the ADA from 2020–21. However, because ADA for the purpose of apportionment is not being reported to the CDE, the prior-year data will look back to 2019–20—providing school districts with declining ADA a one-year reprieve in 2021–22. There is one other consideration for those school districts that availed themselves of the prior-year protection in 2019–20. These districts utilized 2018–19 ADA for 2019–20 apportionment purposes. Therefore, they will see a reduction in their current-year apportionment since the 2020–21 State Budget provision compels the CDE to use 2019–20 ADA for 2020–21 apportionment purposes. The table below illustrates the impact of the 2020–21 ADA funding provision on a district experiencing declining ADA.
Unduplicated Pupil Percentage

Of consequence to all state-funded LEAs is the calculation of the unduplicated pupil percentage (UPP). Current law requires all LEAs to submit pupil demographic data as part of the Census Day count in October. A subset of this data is used to calculate the single-year UPP, which is part of the rolling three-year average that is used to determine the effective UPP for the current year, as well as the amount of supplemental and concentration grant funding. In the recently released Principal Apportionment letter, the CDE noted that LEAs must still submit student records in 2020–21 as there is not a similar one-year abeyance to the UPP calculation as is found with ADA. Given the uncertainty around physical presence of students at schools in 2020–21, this could have a significant detrimental impact on the UPP for the current and two subsequent years, as LEAs may struggle to collect applications for free or reduced-price meals from families in 2020–21.

Conclusion

Both of these factors—declining ADA and changes to the UPP—in conjunction with other factors used to calculate the Local Control Funding Formula, will impact an LEA’s state funding for 2020–21, which, for many, will not represent “flat funding” from 2019–20.

Note: In a signing statement, Governor Newsom tasked the Legislature with finding a solution for those LEAs that experience growth during the 2020–21 schoolyear because the current language in the State Budget does not fund any growth experienced during the fiscal year.

California Charter Schools Sue State for Not Funding Additional Students This Year

Gov. Newsom promises there will be a fix for growing charters and districts

By John Fensterwald
EdSource
July 29, 2020

Four growing charter school organizations are suing Gov. Gavin Newsom, State Superintendent of Public Instruction Tony Thurmond and the California Department of Education, charging that the state’s formula
for funding K-12 schools during the pandemic will illegally deny payments for additional students in their schools.

Their schools are being underfunded by millions of dollars and their students’ constitutional rights are being violated, the lawsuit claims.

The schools and parents of their prospective parents called for the courts to immediately force the state to reimburse the schools for newly enrolled students. If successful, the lawsuit, filed Monday in Superior Court in Sacramento, would benefit traditional school districts that also are not being reimbursed in the coming school year for growth in enrollment.

“"The Legislature should immediately fix this, by funding public school students," Jerry Simmons, attorney for the plaintiffs, said at a press conference Tuesday. “"If it does not, we are confident that the courts will.”

That should not be necessary, H.D. Palmer, a spokesman for the California Department of Finance, wrote in an email Tuesday. It has been the “intent of the Administration” that the Legislature will address the issue in August, he wrote.

Until the coronavirus pandemic suddenly forced schools to close in March, the state had been funding schools based on students’ average daily attendance. Recognizing that many schools wouldn’t be able to keep in regular touch with students in the rough transition to remote learning, Newsom by executive order guaranteed that charter schools and school districts would be reimbursed for the remaining months of school based on their pre-pandemic attendance rates.

Looking ahead to fall with predictions that surges in the pandemic could cause disruptive switches between distance learning and in-person instruction, the Legislature and Newsom agreed to protect schools from gyrations in attendance. In the new state budget, they extended the 2019-20 attendance rates another year, to 2020-21.

The new funding system will shield districts with declining enrollment from financial loss but will hurt growing districts and charter schools — especially those bringing the lawsuit. Several had approval to open new schools and enroll large numbers of students in the fall, with the expectation of full funding.

**Charters caught by surprise**

The Legislature’s decision to base K-12 funding on pre-pandemic enrollment, announced days before passage of the budget in mid-June, blindsided them, Simmons said, and put them in an untenable position. Those with waiting lists conducted lotteries and registrations last spring and are now legally bound to serve students that the state will not pay for.

“"Not funding public school students because their families have made an educational decision in their children’s best interest is inequitable and unconscionable," said Juan Carlos Villasenor, founding principal of one of four Voices College-Bound Language Academies, a plaintiff in the lawsuit. Voices plans to open a new school in Stockton this fall and expand the number of grades in its Bay Area schools. Accommodating uncompensated new students will force cuts on the remaining schools, with layoffs of student service managers, special education paraprofessionals and an instructional coach at each school.

“"The schools will have to spread money for existing kids. Hundreds of thousand of kids will be impacted by absorbing cuts and reductions,” Simmons said.
The other plaintiffs are the Fortune School, a TK-12 network of nine schools in Sacramento and San Bernardino, serving primarily Black students; John Adams Academy, “a TK-12 Classical leadership” network with campuses in Roseville, El Dorado Hills and Lincoln; and Sycamore Creek Community Charter School, a TK-8 charter school in Huntington Beach guided by the principles of Waldorf education.

Leaders from those schools made similar arguments. Sycamore Creek’s executive director, Sarah Bach, said that without tuition revenue for its planned expansion, it would have to fund twice as many students at 50% funding.

Fortune School is opening a new school in south Sacramento targeting Black students who have not been well served, said Fortune’s President and CEO Margaret Fortune. “I opened a network of schools to close the African American achievement gap by preparing kids for college in a different way. We enter into this lawsuit, not lightly. It’s the last thing that you want to do. But we will use every resource within our grasp to protect our children and our students.” The lawsuit, Samaiya Atkinds v. State of California, bears the name of a kindergartner who is enrolled in the new Sacramento school.

Although enrollment statewide has been gradually declining, some districts like Elk Grove, near Sacramento, have been growing and would also be adversely affected. Newsom acknowledged the unsolved problem but said maintaining school funding at current levels would allow for “stability” in a June 29 budget message.

“I urge members of the Legislature to pursue targeted solutions to these potential disruptions and will work with you in coming weeks to enact them,” he wrote.

The Legislature’s challenge is that any solution will likely require some double funding: paying tuition to charter schools for their new students and paying the districts where some of the students came from. Districts already facing added costs of the pandemic based their budgets on the assumption they’d get what they received last year.

Simmons and legislative staff haven’t estimated the cost of a fix, but it would be at least several hundred million dollars. Palmer indicated that the compromise would involve paying districts and charter schools for “planned growth.” That implies documentable pre-pandemic approvals for expansion and actions like hiring staff, enrolling students and finishing buildings — but not parents’ decisions to switch schools since the start of the pandemic.

Accurately documenting attendance might be hard to do anyway. Although school districts will be required to take daily attendance, including check-ins during distance learning, they will not be required this year to report the data to the state.

Simmons said the lawsuit should serve as a reminder not to delay. “The facts of this case are incredibly compelling. The state has an obligation to fund what it is obligated to fund, and students have a constitutional right” to an equal opportunity for an education, he said.
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Note: Because of Governor Newsom’s recent guidance that does not permit schools to physically reopen if their counties are on the state’s COVID-19 monitoring list, most LEAs will begin the 2020–21 school year under distance learning programs.

Schools Scramble To Teach Teachers How To Educate Virtually

By Mikhail Zinshteyn
CalMatters
July 29, 2020

For most California students in schools and colleges, the fall term will look like the middle of spring: online with little to no in-person instruction.

But if students and parents accepted the rapid switch to online in March and April as an emergency need while a pandemic spiraled out of control, their expectations for fall will be different.

“With a number of months to prepare, that same grace and gratitude probably won’t be there,” said Brad Rathgeber, the CEO of One Schoolhouse, a Washington D.C.-based consortium of 218 mostly “independent” private K-12 schools that offers online coursework to students and trains teachers readying for a virtual fall.

Schools at every level have tried different strategies to prepare teachers for distance learning in the fall, from paying companies like One Schoolhouse to developing their own training curriculum.

Here’s a look at how some of that is shaking out.

Spring training

When teachers rushed to move instruction online back in March, “they were basically taking what they did in their face-to-face classrooms and finding an online equivalent,” said Rathgeber.

But the rules of in-person instruction don’t fully apply to teaching virtually. Educators need to spend considerable time learning not just the new digital tools but totally different strategies for teaching students who’ll likely never set foot in a classroom this fall.

Experts say teaching is about building relationships. Without the ability to see students in-person, how can schools and colleges forge the human element that can easily go missing in a virtual environment? One strategy is for teachers and professors to organize group learning activities over video conferencing software. Another, which takes time to get right, is figuring out what content should instructors prioritize for live instruction and what can be assigned as homework for students to review, such as explanatory videos or articles to prepare for a live discussion.

One Schoolhouse charges schools $300 per teacher for approximately 15 hours of training for teaching virtually, or $450 if the school isn’t part of the One Schoolhouse consortium. Several California schools took on those services, Rathgeber said, including Marin Academy, a private school in San Rafael, CA, where all roughly 70 teachers and faculty took part in the training. One Schoolhouse also provides free training to any teacher outside its network through webinars.
Los Angeles Unified School District, California’s largest, in May created 30 hours of online training to ready teachers for distance learning. More than 11,000 teachers completed the training, just under half of the district’s teaching corps.

Public and private universities are running faculty training programs this summer to help them create virtual courses and teach them techniques for improving student learning online. Some are even offering faculty stipends to learn the virtual instruction ropes.

For California universities that made early decisions to move most, if not all, instruction online for fall term, the summer has been smoother. By focusing on online teaching, the fall learning plan “is coherent from beginning to end and doesn’t have a lot of this flipping back and forth” between scenarios that bring instruction back in person mid-term, said Deanna L. Fassett, assistant vice provost for faculty development at San Jose State University, where all instruction is expected to be remote in the fall.

An ideal plan for K-12 teachers

For K-12 schools, training faculty for an online fall is key, says Alix Gallagher, director of strategic partnerships at Policy Analysis for California Education, an education research center made up of faculty from several premier California universities that last week published a guide for schools to prepare for online learning. “What happened this past spring, I’ll say as a researcher and parent, in general, was pretty terrible and we need to get it better,” Gallagher said.

Learning the bells and whistles of technology is important but the training can’t stop there. She’d like to see district headquarters, which have curriculum specialists on staff, develop model lesson plans for a variety of subjects that can be imported to a virtual fall.

The models should include guidance for teachers on what kind of learning can happen synchronously — the term used to mean live virtual instruction — and what can be assigned for students to learn on their own time, she said.

That’s where familiarity with the technology is important. Teachers should know how to organize virtual breakout rooms on Zoom, the popular video conferencing software that’s become ubiquitous in the era of COVID-19, to schedule group discussions among students to better reinforce the content they’re trying to teach.

To improve classroom security, teachers should also know how to create login credentials so that only students assigned to the class can enter the video meetings, Gallagher said.

That training should be ongoing, because “there will probably be a long learning trajectory for teachers,” Gallagher said. She recommends districts restructure part of their school calendar to focus more on teacher training. The training can also look like the lesson plans teachers will be developing — with some aspects done synchronously and others on-demand — and use the same tools teachers will work with while teaching students.
Teacher training isn’t the only focal point for schools; a substantial digital divide remains. More than 700,000 students still lack a computer and more than 300,000 can’t connect to the internet, according to the California Department of Education.

New state law says districts going virtual must ensure students have digital and online access to instruction, but other rules suggest districts will have to train teachers, too. In draft rules that the state has to complete soon, districts need to have distance learning plans. “Presumably, a quality distance learning program would have this training component,” said Troy Flint, spokesperson for the California School Boards Association.

The state freed up a $5.3 billion pot of money to help districts transition to virtual learning, including training for teachers.

**Higher-ed strategies**

University of the Pacific, a private university in Stockton with campuses elsewhere in the state, decided to go fully virtual in the fall July 17. Roughly 400 faculty out of nearly 900 at the university are taking online
training on teaching virtually that the university developed in-house by the staff of the Center for Teaching and Learning.

Lott Hill, director of the center at Pacific, says the certainty of an online fall freed up a lot of energy to “improving instruction for teaching online.”

The training amounts to 35 to 40 hours of on-demand tutorials and web content that faculty learn at their own pace, plus ongoing live training where they can ask questions and discuss best strategies for the subjects they’ll be teaching.

Among other techniques, the tutorials recommend that faculty break up their on-demand assignments into smaller eight-minute chunks that are punctuated by short quizzes or writing assignments that allow students to reflect on what they just learned. That’s based on the science of learning findings that show the typical human attention span is limited.

University of California Berkeley has multiple waves of faculty training for a virtual fall, including an ongoing webinar series. The university was already planning to teach only a small percentage of classes in-person, but made the decision to go fully online last week after an outbreak of 47 COVID-19 cases that the university disclosed July 8.

One concerted approach is an eight-week training program for 200 graduate student instructors that comes with a $5,000 stipend. Another is Semester in the Cloud, a campus undertaking to develop more than 40 courses for a virtual setting. These typically enroll hundreds of students each and are essential introductory and “gateway” courses for first-year students.

The university hired additional instructional designers and paired them with learning specialists and faculty — who’re also receiving $5,000 stipends — to build the courses. The collaboration is vital to developing online material speedily that in the pre-pandemic era would take much longer to engineer, said Terry Johnson, faculty director of the Center for Teaching and Learning at Berkeley.

Some design details are still being worked out. A team developing a chemistry course in Semester in the Cloud is searching for the right tool to capture the chemical equations students need to write out that software can automatically grade. The grading software can’t always accurately read the equations that students upload with their smartphone cameras because of camera glare or other lighting effects. One idea is for students to use a stylus pen to record their answers. Another is to use a simple scanner that just reads what’s on the page.

Other experts stressed the importance of tinkering on the backend to make the technology intuitive for students. Johnson doesn’t want “students to have frustration with the technology” and instead focus on the content.

One Schoolhouse’s Rathgeber agrees. A mistake he saw educators make in the spring was overwhelming students with technology, apps and links. “Actually, no,” he said. “You want to make sure that there’s a simplicity there.”

**Federal funding**

This summer San Jose State began offering full and part-time faculty $1,000 stipends to enroll in a three-week training institute for online instruction. More than 1,000 faculty heeded the call.
Diane Belger, a lecturer in accounting and finance, enrolled. Like the others in the training institute, she had to pass four mandatory training courses and take three others of her choosing from a pre-selected list, not unlike the required and elective courses of a college minor.

One key takeaway from the institute was that she doesn’t need to lecture as much during the live courses and can instead record her own videos or find ones on YouTube to explain key concepts to supplement assigned reading material.

“And then I can use my time with students to break them into smaller groups, to work problems with them,” Belger said. “Or to talk about what’s going on in the real world.”

Another strategy she hopes to employ is assembling more of her students into small groups for all of fall term, which she says will allow students to learn more from each other.

In addition to tech know-how and virtual curriculum planning, the San Jose State training also included courses intended to benefit faculty and students even after in-person learning resumes, like structural inequality.

In all, the university has spent about $2.5 million on faculty training and preparing for a virtual fall, including money for the stipends, hiring faculty trainers, bringing on mentors who each guide about 20 faculty members into the fall, and other software and equipment for students, such as engineering kits that are being mailed to them.

Much of the money came from the federal CARES Act, the March stimulus package that awarded the California State University system $563 million, about half of which went to students.

“We wouldn’t be able to do this at this scale without the CARES Act,” said San Jose State Provost Vincent Del Casino, Jr.
Regarding: 2020/21 State Adopted Budget Update

The purpose of this communication is to provide the Board an update from the July 10, 2020 board communication (Attachment I) regarding the impact to Fresno Unified of the final State Adopted Budget for 2020/21.

The district’s 2020/21 Adopted Budget was approved by the Board on June 10, 2020. This included revenue assumptions based on the Governor’s May Revise. The State Budget was enacted on June 26, 2020. The State’s Adopted Budget varied significantly from the May Revise and the impacts will be recognized in Budget Revision No. 1 which is included for the Board’s consideration and approval at the August 12, 2020 Board meeting. The following itemize the changes (new or revised) to Fresno Unified’s 2020/21 Adopted Budget:

• Local Control Funding Formula (LCFF) – Increased from negative 7.92% cost-of-living (COLA) to 0.00% COLA – $65.6 million ongoing (revised)
• Cash Deferrals – Cash deferrals deepened – no cash will be provided for the above change in budgeted revenues ongoing (revised)
  o The state instituted increasing deferred payments for approximately 1/3 of budget revenues pushing payments of 2020/21 revenues to 2021/22. The result is that districts will not receive the same level of cash as budgeted revenues and for the first time since 2002, Fresno Unified will be faced with the possibility of issuing short-term debt to cover all or part of the gap
• After School Education and Safety (ASES) – Reinstated reductions – $1.6 million ongoing (revised)
• Preschool Grants – Reinstated reductions – $1.5 million ongoing (revised)
• Special Education Funding – Adjusted funding – Loss of $645,000 vs. loss of $1 million (revised)
  o The May Revised budget reduced AB 602 funding as compared to the Governor's January budget proposal resulting in a loss of $1 million for Fresno Unified. The final State Budget provided some relief to this reduction
• Unrestricted Lottery – Per ADA funding decreased – $153 to $150 – ($210,000) ongoing (revised)
• Restricted Lottery – Per ADA funding decreased – $54 to $49 – ($350,000) ongoing (revised)
• Coronavirus Aid, Relief, and Economic Security Act (CARES) – Increase of $21.2 million one-time (revised)

Several of the items above also result in considerable changes to the multi-year projections. As a result, the contemplated additional budget reductions for 2021/22 and 2022/23 will be presented at the First Interim Budget Report based on actual expenditures as of October 31, 2020. In any event, at this time, Budget Revision No. 1 proposes an increase in the funds budgeted for additional investments to address distance learning, health and safety considerations for the 2020/21 school year from $13.1 million to $23.1 million.

If you have any questions, or require additional information, please call Ruthie Quinto at 457-6226.

Approved by Superintendent
Robert G. Nelson Ed.D. ___________________________ Date: 08/07/2020
From the Office of the Superintendent
To the Members of the Board of Education
Prepared by: Ruth F. Quinto, Deputy Superintendent/CFO

Regarding: 2020/21 State Adopted Budget Update

The purpose of this communication is to provide the Board an update regarding the 2020/21 State Adopted Budget, which was signed by the Governor on June 29, 2020.

The district’s 2020/21 Adopted Budget was approved by the Board on June 10, 2020. This included assumptions based on the Governor’s May Revise. On June 29, 2020 the Governor signed the negotiated State budget agreement. Listed below are updates that impact Fresno Unified’s 2020/21 Adopted Budget:

- The Local Control Funding Formula (LCFF) is not receiving a cost-of-living adjustment (COLA) (0%) and is still a reduction from the statutory COLA of 2.31%
- Categorical Fund adjustments include:
  - Reinstate proposed reduction in funding for After School Education and Safety Grants (ASES) and will also include an increase in the daily rate
  - Reinstate proposed reduction in funding for Preschool, Strong Workforce, and Career Technical Grants
  - Community School Grants of $45 million will be funded on a competitive basis
- Special Education will generate $625 per ADA instead of $645 proposed in the May Revise. The difference in funding will be allocated to low incidence students, which includes those who are physically impaired, such as deaf and hard of hearing and orthopedically impaired.
- CalSTRS and CalPERS remains as proposed in the May Revise
- Coronavirus Aid, Relief, and Economic Security Act (CARES) provides an increase in one-time revenue to address student learning loss as a result of the pandemic. The May Revise included funding based on two criteria: students with disabilities and districts with high concentrations of disadvantaged students. In addition to these criteria, the Governor adopted a third criteria which is based on districts’ total average daily attendance (ADA). As a result of this change, funding for the district from CARES increased from $65 million at the May Revise to $74 million.
- Districts will be held harmless for 2020/21 ADA based on the 2019/20 ADA
- Certificated and classified staff protections include no layoffs for non-management certificated staff and classified staff who hold a position in nutrition, transportation, or custodial services may not be laid off from July 01, 2020 to June 30, 2021
- Waive annual instructional minutes, however daily instructional minutes and 180 instructional days remain requirements
- Cash deferrals were significantly increased, and additional relief may be provided pending additional federal stimulus funds. The significant deferrals will most likely require districts to prepare for temporary borrowing (Tax Revenue Anticipation Notes - TRANS). The last time Fresno Unified issued a TRANS was in 2002 for $26 million

We recommend reevaluating district budget scenarios after the state’s July 15th tax receipt deadline which will better inform resource levels for 2020/21. Currently, staff suggests the following:
Maintain the current budget Board approved budget adjustments and reductions for 2020/21.

Increase investments for learning loss mitigation by $10 million (from $13.1 million to $23.1 million) for 2020/21 as additional and/or unanticipated costs may be required.

Finally, and of significant importance, the State's 2020/21 Adopted Budget significantly altered the requirements for the Local Control and Accountability Plan (LCAP) which had previously been amended through Executive Order N-56-20. As a result, the adoption of a traditional LCAP is not required for 2020/21. Instead, districts must complete and adopt a new and different LCAP for 2020/21: The Learning Continuity and Attendance Plan (new LCAP).

In broad terms, the new LCAP will describe how districts address COVID-19 impacts. An important aspect of this change is the condensed timeline for input from both internal and external stakeholders. At a minimum, districts must:

- Consult with a variety of stakeholders
- Present the new LCAP to the District Advisory Committee
- Present the new LCAP to the District English Learner Advisory Committee
- Conduct a public hearing
- Adopt the plan at a separate public meeting

These activities must be completed prior to September 30, 2020, the latest date when the new LCAP must be adopted by the Board. The California Department of Education (CDE) has not yet released a planning template for the new LCAP and estimates it will be available August 1st. However, staff has already reached out to district leaders to begin documenting the new LCAP plan elements, and as well, our office has begun organizing community and stakeholder outreach. An update will be provided to the Board once specific requirements become available from CDE and further progress ensues regarding a formalized community outreach plan.

If you have any questions, or require additional information, please call Ruthie Quinto at 457-6226.

Approved by Superintendent
Robert G. Nelson Ed.D. ___________________________ Date: 07/10/2020
Regarding: District’s Bond Rating Affirmed by Moody’s Investors Service

The purpose of this communication is to inform the Board that Fresno Unified School District’s Aa3 rating was affirmed by Moody’s Investors Service.

In the Moody’s Investors Service update to potential investors dated August 07, 2020, the credit opinion labeled the district’s outlook as “stable”. Moody’s noted, “The district benefits from a stable and strong management team, with prudent fiscal practices and a consistent track record of outperforming budget.” In contrast, the district’s credit profile is constrained by the low resident income measure and elevated leverage, including outstanding debt, pensions, and an exceptionally high unfunded other post-employment benefits (OPEB) liability compared to peers. Moody’s also stated that the district’s unfunded OPEB liability is partially offset by continued contributions and recent adjustments to the district’s OPEB trust.

Another note of importance is included in the Detailed Credit Considerations section which states that financial operations and reserves contribute to a healthy financial position expected to remain stable under prudent management. Further, Moody’s stated that, “Fresno Unified’s financial position is supported by healthy reserves and liquidity.”

The complete report issued by Moody’s Investors Services is attached.

If you have any questions or require additional information, please call Ruthie Quinto at 457-6226.
Fresno Unified School District, CA

Update to credit analysis

Summary
Fresno Unified School District, CA (Aa3 Stable) benefits from an exceptionally large tax base poised for additional growth and healthy finances, which we expect to continue. The district also benefits from a stable and strong management team, with prudent fiscal practices and a consistent track record of outperforming budget, which we expect will continue to support balanced operations despite reduced state aid growth going forward. In contrast, the district’s credit profile is constrained by low resident income measures and elevated leverage, including outstanding debt, pensions and an exceptionally high unfunded other post-employment benefits (OPEB) liability compared to peers. We expect that the district’s outstanding debt will continue to grow with future issuances under a $325 million general obligation (GO) bond authorization recently approved by voters in March 2020, yet remain manageable with tax base growth.

We regard the coronavirus outbreak as a social risk under our ESG framework, given the substantial implications for public health and safety. We do not see any material immediate credit risks for Fresno USD. California’s Senate Bill 117 guarantees all districts’ funding based upon average daily attendance (ADA) through February 29, 2020 and waives instructional time penalties, effectively holding districts harmless for state funding in fiscal 2020. The state has also committed to funding districts in fiscal 2021 based on last year’s enrollment level, as long as districts fulfill certain instruction requirements. The district’s strategic plan is to begin the 2021 school year in a 100% online learning model through at least the first quarter of learning and will only plan for a return to campus when Fresno County has been off of the state’s monitoring list for more than 14 consecutive days.

Credit strengths
- Large tax base poised for additional, albeit slowed growth
- Strong management team and adopted reserve policies that should help preserve a stable financial position

Credit challenges
- Below average socioeconomic profile with high rates of poverty
- Elevated leverage including debt, pensions and a very high unfunded OPEB liability

Rating outlook
The stable outlook reflects our expectation that the district’s financial position will remain stable despite expectations of diminished state aid growth. It also reflects our expectation
that the district’s tax base will continue to expand and remain a strength for the rating level, despite near term weakness because of the coronavirus pandemic.

**Factors that could lead to an upgrade**

- Significant improvement in socioeconomic measures
- Sustained strengthening of the district’s financial position
- Meaningful reduction of long-term liabilities

**Factors that could lead to a downgrade**

- Material, protracted decline in assessed value
- Deterioration of the district’s reserves and liquidity

**Key indicators**

<table>
<thead>
<tr>
<th>Exhibit 1</th>
<th>Fresno Unified School District, CA</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economy/Tax Base</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Full Value ($000)</td>
<td></td>
<td>$18,211,001</td>
<td>$18,946,469</td>
<td>$19,688,609</td>
<td>$20,449,286</td>
<td>$21,361,372</td>
</tr>
<tr>
<td>Population</td>
<td></td>
<td>390,885</td>
<td>391,599</td>
<td>390,731</td>
<td>390,426</td>
<td>390,426</td>
</tr>
<tr>
<td>Full Value Per Capita</td>
<td></td>
<td>$46,589</td>
<td>$48,382</td>
<td>$50,389</td>
<td>$52,377</td>
<td>$54,713</td>
</tr>
<tr>
<td>Median Family Income (% of US Median)</td>
<td></td>
<td>56.0%</td>
<td>55.6%</td>
<td>57.8%</td>
<td>58.3%</td>
<td>58.3%</td>
</tr>
<tr>
<td>Finances</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operating Revenue ($000)</td>
<td></td>
<td>$750,819</td>
<td>$894,146</td>
<td>$915,799</td>
<td>$961,780</td>
<td>$1,040,288</td>
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<tr>
<td>Fund Balance ($000)</td>
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<td>$88,985</td>
<td>$115,777</td>
<td>$179,480</td>
<td>$169,829</td>
<td>$180,734</td>
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<td>Cash Balance ($000)</td>
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<td>$123,901</td>
<td>$188,924</td>
<td>$242,663</td>
<td>$250,452</td>
<td>$237,389</td>
</tr>
<tr>
<td>Fund Balance as a % of Revenues</td>
<td></td>
<td>11.9%</td>
<td>12.9%</td>
<td>19.6%</td>
<td>17.7%</td>
<td>17.4%</td>
</tr>
<tr>
<td>Cash Balance as a % of Revenues</td>
<td></td>
<td>16.5%</td>
<td>21.1%</td>
<td>26.5%</td>
<td>26.0%</td>
<td>22.8%</td>
</tr>
<tr>
<td>Debt/Pensions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net Direct Debt ($000)</td>
<td></td>
<td>$471,449</td>
<td>$512,852</td>
<td>$650,187</td>
<td>$697,536</td>
<td>$681,972</td>
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<tr>
<td>3-Year Average of Moody’s ANPL ($000)</td>
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<td>$1,537,916</td>
<td>$1,646,567</td>
<td>$1,904,494</td>
<td>$2,148,047</td>
<td>$2,332,688</td>
</tr>
<tr>
<td>Net Direct Debt / Full Value (%)</td>
<td></td>
<td>2.6%</td>
<td>2.7%</td>
<td>3.3%</td>
<td>3.4%</td>
<td>3.2%</td>
</tr>
<tr>
<td>Net Direct Debt / Operating Revenues (x)</td>
<td></td>
<td>0.6x</td>
<td>0.6x</td>
<td>0.7x</td>
<td>0.7x</td>
<td>0.7x</td>
</tr>
<tr>
<td>Moody’s - adjusted Net Pension Liability (3-yr average) to Full Value (%)</td>
<td></td>
<td>8.4%</td>
<td>8.7%</td>
<td>9.7%</td>
<td>10.5%</td>
<td>10.9%</td>
</tr>
<tr>
<td>Moody’s - adjusted Net Pension Liability (3-yr average) to Revenues (x)</td>
<td></td>
<td>2.0x</td>
<td>1.8x</td>
<td>2.1x</td>
<td>2.2x</td>
<td>2.2x</td>
</tr>
</tbody>
</table>

Operating funds include the district’s general fund and bond interest and redemption fund.

*Source: Fresno Unified School District, CA audited financial statements; Moody’s Investors Service*

**Profile**

Fresno Unified School District serves the [City of Fresno](#) (A3 Stable), a small portion of the [City of Clovis](#) (Aa2), and unincorporated areas of Fresno County. With 103 schools and approximately 70,603 students budgeted for fiscal 2021 enrollment, the district is the third largest public school district in California as measured by enrollment.
Detailed credit considerations

Economy and tax base: very large and growing tax base, albeit with low income level
The district’s large and diverse tax base will remain a credit strength for the rating level, despite near term weakness because of the coronavirus pandemic. Assessed valuation (AV) reached $23.4 billion in 2021, up 6.1% over the prior year, far exceeding Aa3-peer medians nationally ($2.8 billion) and within California ($7.0 billion). Following moderate declines during the last recession, with AV contracting 13% from a $19.3 billion pre-recession peak, AV has resumed moderate growth, increasing 4.4% on average per year over the last five years. We expect the favorable mechanics of Proposition 13, housing turnover and moderate development will continue to support additional growth, albeit at a slower rate than previous years because of the coronavirus driven slowdown.

Typical for California’s Central Valley, income levels are very low with median family income just 58.3% of the US, compared to the national peer median (105% of the US). Poverty is also elevated at greater than two times the national and state medians. Reflective of the unprecedented economic slowdown because of the coronavirus pandemic, unemployment within Fresno County is high at 14.6% as of June 2020. We currently forecast US GDP to decline significantly during 2020 with a gradual recovery commencing toward the end of the year. Local governments with the highest exposure to the tourism, healthcare, retail, oil and gas, and international trade sectors could suffer particularly severe impacts.

Financial operations and reserves: healthy financial position expected to remain stable under prudent management
Fresno USD’s financial position is supported by healthy reserves and liquidity, providing a modest buffer as the district navigates reduced state aid growth going forward. Projected deficits in fiscal years 2020 — 2022 would result in reserves that are still sufficient for the rating level. However, we anticipate actual results will be stronger given the district’s conservative budgeting practices. The district has a very large operation, which also provides some economies of scale.

In fiscal 2019, available general fund reserves amounted to $139 million or an adequate 14.0% of revenue, consistent with the district’s average over the last five years, 12.6% of revenue. Available operating reserves, including the general fund and debt service fund, are broadened to $181 million or a healthy 17.4% of operating revenue. In recent years Fresno USD has benefited from strong increases in state funding, which, in addition to management’s conservative budgeting, has mitigated ongoing challenges of rising special education and pension costs. The district has a high unduplicated count of 89%, which entitles the district to supplemental and concentration funding from the state. Also, significant one-time monies received over the last several years have bolstered finances.

For fiscal 2020, current estimates indicate a $17 million general fund deficit at year end, largely a spend down of restricted general fund moneys. Should the district realize the projection, available general fund reserves would remain in line with recent levels at $136 million or 13.4% of revenue. However, given normal vacancy savings as well as savings from reduced substitute use, contracts and transportation costs since the district’s transition to distance learning in March, officials expect the deficit will be lower.

The district’s 2021 adopted budget conservatively forecasts a $22 million general fund deficit, based on a 10% cut to K-12 funding outlined in the Governor’s May budget revise, as well as about $30 million in ongoing budget cuts management identified to mitigate this loss in revenue. However, we expect actual results will be significantly stronger given the state’s adopted 2021 budget preserved K-12 funding, albeit with a 0% cost of living adjustment (COLA) and greater delayed disbursements of funds “deferrals”.

Based on the state’s agreement to preserve K-12 funding, as well as greater than anticipated one-time loss learning mitigation funds that the district expects to receive from the state, officials anticipate that fiscal 2021 will remain balanced. In total the district expects to receive a significant $120 million in federal and state one time funds. Additionally, a 0% COLA and the district’s contingent salary formula should help control increases in salary expenditures. Previously, officials and bargaining units negotiated a 3-year revenue sharing contract through 2022, which awards teachers 1% of any COLA less amounts set aside for benefit increases, up to a max of 3% annually.

Liquidity
Fresno USD’s liquidity is healthy, including about $113 million in borrowable funds outside of the general fund, and positions the district well to navigate expected state funding deferrals. General fund net cash was a strong $196 million or 19.7% of revenue in fiscal 2019. On an operating basis, net cash is broadened to $237 million or a sound 22.8% of operating revenue. Officials expect current
reserves and interfund borrowing will be sufficient to bridge state funding deferrals in fiscal 2021. However, should the district need to, the issuance of Tax and Revenue Anticipation Notes is another strategy for which the district is exploring.

**Debt and other liabilities: elevated leverage, including debt, pensions and a very high unfunded OPEB liability**

The district’s outstanding debt will remain elevated, with additional AV growth and future issuances under a $325 million general obligation (GO) bond authorization recently approved by voters in March 2020. Including the current 2020 refunding bonds and Series C bonds, which represent the third and final series of GO bonds under the district’s 2016 authorization, outstanding direct debt approaches 3% of AV, compared to the national median of Aa3-peers (1.6% of AV). Other near term debt plans include a contemplated $6 million refunding of the district’s outstanding 2006 lease revenue bonds (central kitchen project), which are not rated by Moody’s.

**Legal security**
The district’s GO bonds are secured by the levy of ad valorem taxes, unlimited as to rate or amount, upon all taxable property within the district. The portion of the levy restricted for debt service is collected, held and transferred directly to the paying agent by Fresno County, on behalf of the district.

**Debt structure**
All of the district’s debt is fixed-rate with various maturities through 2047.

**Debt-related derivatives**
The district has no debt-related derivatives.

**Pensions and OPEB**
While fixed costs are currently manageable, pension-driven budgetary pressures could prove burdensome given the district’s elevated pension and OPEB liabilities. In fiscal 2019, fixed costs for the district including pension and OPEB contributions totaled 12.4% of operating revenue, a still manageable, but increasing figure. Moody’s adjusted net pension liability (ANPL) for the district exceeds $2.3 billion in fiscal 2019, using discount rate of 4.14% under our methodology for adjusting reported pension and OPEB data. This is significantly higher than the district’s reported net pension liability totaling $906 million using a weighted average discount rate of 7.11%. The three-year average of ANPL represents an above average 2.2 times operating revenue compared to peer medians nationally (1.5 times) but similar to California (2.2 times).

The district’s OPEB liability remains exceptionally high at 1.4 times operating revenue compared to the national peer median (0.2 times). We expect this liability will continue to be a budgetary burden on the district’s long term financial operations, although continued contributions to an OPEB trust and recent adjustments to the district’s OPEB plan improve the long-term outlook for this obligation. Importantly, management adjusted its OPEB offering to new employees in July 2005, which capped costs and limited long-term benefits. Additionally, the district continues to contribute to an OPEB trust, with a current balance of close to $52 million, up from an initial transfer of $20 million made in 2014. Given the size of the OPEB liability, we expect that it will remain a budgetary burden, but one that district management is willing to address and will likely manage effectively.

**ESG considerations**

**Environmental**
Environmental considerations are not a material driver of the district’s credit profile at this time.

**Social**
Social considerations do not pose a material risk to the district’s credit profile. The district’s below-average resident income metrics for the rating level are an offsetting weakness to its otherwise very large tax base. Social considerations also include the risk associated with the coronavirus outbreak, as discussed in the summary section.

In common with other districts within the state, long-term financial stability will in part hinge on stabilizing enrollment. Positively, district average daily attendance (ADA), a key metric in determining the amount of state funding the district receives, has stabilized in recent years, although additional modest declines of 100 ADA are conservatively projected over the multiyear budget period.
**Governance**

California school districts have an Institutional Framework score of "A," or moderate. California school districts’ major revenue sources are determined by the state government or, for the most part, can only be raised with voter approval. Ad valorem property tax rates cannot be increased above 1% except to meet GO bond payments, and assessed valuation growth is also generally limited to 2% annually unless a property changes ownership. Unpredictable revenue fluctuations tend to be moderate, or between 5-10% annually. Across the sector, fixed and mandated costs are generally less than 25% of expenditures. These constraints are somewhat offset by the state’s practice of holding revenue harmless for one year of enrollment declines. Unpredictable expenditure fluctuations tend to be minor, at under 5% annually.

The district benefits from a stable and strong management team, that supports our confidence the district will manage through reduced state aid growth going forward. The district’s five-year average ratio of operating revenues to expenditures through fiscal 2019 was 1.02 times, reflecting generally balanced operations in recent years. Additionally, Fresno USD’s management team, many with long tenure at the district, has a strong track record of outperforming budget in the last five years. The district also has an adopted policy for maintaining general fund reserves between 5% and 10%, which should also help preserve a stable financial position.
Rating methodology and scorecard factors
The US Local Government General Obligation Debt methodology includes a scorecard, a tool providing a composite score of a local government's credit profile based on the weighted factors we consider most important, universal and measurable, as well as possible notching adjustments dependent on individual credit strengths and weaknesses. Its purpose is not to determine the final rating, but rather to provide a standard platform from which to analyze and compare local government credits.

Exhibit 2
Fresno Unified School District, CA

<table>
<thead>
<tr>
<th>Scorecard Factors</th>
<th>Measure</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economy/Tax Base (30%) [1]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tax Base Size: Full Value (in 000s)</td>
<td>$23,438,674</td>
<td>Aaa</td>
</tr>
<tr>
<td>Full Value Per Capita</td>
<td>$56,575</td>
<td>A</td>
</tr>
<tr>
<td>Median Family Income (% of US Median)</td>
<td>58.3%</td>
<td>Baa</td>
</tr>
<tr>
<td>Notching Adjustments:[2]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outsized Unemployment or Poverty Levels: poverty level greater than 2 times state and national medians</td>
<td>Down</td>
<td></td>
</tr>
<tr>
<td>Finances (30%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fund Balance as a % of Revenues</td>
<td>17.4%</td>
<td>Aa</td>
</tr>
<tr>
<td>5-Year Dollar Change in Fund Balance as % of Revenues</td>
<td>8.7%</td>
<td>A</td>
</tr>
<tr>
<td>Cash Balance as a % of Revenues</td>
<td>22.8%</td>
<td>Aaa</td>
</tr>
<tr>
<td>5-Year Dollar Change in Cash Balance as % of Revenues</td>
<td>17.5%</td>
<td>Aa</td>
</tr>
<tr>
<td>Management (20%)</td>
<td></td>
<td></td>
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<tr>
<td>Institutional Framework</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>Operating History: 5-Year Average of Operating Revenues / Operating Expenditures (x)</td>
<td>1.0x</td>
<td>A</td>
</tr>
<tr>
<td>Notching Adjustments:[2]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unusually Strong or Weak Budgetary Management and Planning: strong management team with conservative budgeting practices</td>
<td>Up</td>
<td></td>
</tr>
<tr>
<td>Debt and Pensions (20%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net Direct Debt / Full Value (%)</td>
<td>3.8%</td>
<td>A</td>
</tr>
<tr>
<td>Net Direct Debt / Operating Revenues (x)</td>
<td>0.8x</td>
<td>A</td>
</tr>
<tr>
<td>3-Year Average of Moody's Adjusted Net Pension Liability / Full Value (%)</td>
<td>10.6%</td>
<td>Baa</td>
</tr>
<tr>
<td>3-Year Average of Moody's Adjusted Net Pension Liability / Operating Revenues (x)</td>
<td>2.2x</td>
<td>A</td>
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<tr>
<td>Notching Adjustments:[3]</td>
<td></td>
<td></td>
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<tr>
<td>Unusually Strong or Weak Security Features: secured by statute [3], lockbox feature [3]</td>
<td>Up</td>
<td></td>
</tr>
<tr>
<td>Other Scorecard Adjustment Related to Debt and Pensions: contingent risk associated with state pension support [4]; very high unfunded OPEB liability is an outlier compared to peers</td>
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<tr>
<td>Scorecard-Indicated Outcome</td>
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<td></td>
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<tr>
<td>Assigned Rating</td>
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<td></td>
</tr>
</tbody>
</table>

[1] Economy measures are based on data from the most recent year available.
[3] Standardized adjustments are outlined in the GO Methodology Scorecard Inputs publication.
[4] Source: Fresno Unified School District, CA audited financial statements; Moody's Investors Service

Endnotes
1 Available general fund reserves exclude balances reported as nonspendable and restricted
2 Includes the district’s adult education, cafeteria enterprise, capital facilities, special reserve for capital projects, self insurance and other post employment benefit funds.
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From the Office of the Superintendent
To the Members of the Board of Education
Prepared by: Ruth F. Quinto, Deputy Superintendent/CFO
Cabinet Approval: 

Regarding: Opening of Schools Town Hall Meeting Challenges

The purpose of this communication is to provide the Board information in response to concerns shared regarding the August 06, 2020 Town Hall Meeting.

Staff from all participating departments debriefed immediately following the Town Hall meeting, and outlined the following. Multiple challenges were identified as a result of unprecedented levels of participation and multiple technical difficulties with the technology platform, and the current structure of translation services. A more comprehensive response will be provided; however, to mitigate the multiple challenges the following is communicated at this time:

1. Information Technology staff are investigating Microsoft Live which can handle up to 10,000 callers on the translation line. If that does not appear to be workable, staff will look to a contractor (like AT&T) directly to provide a Fresno Unified webinar system that accepts live questions during the event. Either of these options will replace the current UStream, which basically is a feed of the Teams presentation. Also, UStream requires a separate conference line for translation services; however, the conference line has a 300-person limit. The limit has not been an issue in the past, but with over 3,000 participants for this Town Hall, more than 300 non-English-speaking participants were seeking live translation. A more direct interactive and linked up translation option is obviously needed.

2. Instructional Division staff are scheduling immediately an ALL Spanish presentation of last night’s meeting, as well as an ALL Hmong presentation. The Power-Point will be fully translated in the respective language, which should have been available in advance of the Town Hall. The presenters will be Fresno Unified staff who are native speakers of Spanish or Hmong, respectively.

In addition to the strategies employed above, a more comprehensive set of guidelines is currently being sought to be developed by the Communications team in coordination with English Language Services to more effectively engage with parents and guardians whose primary language is not English. These guidelines will be particularly helpful for school site leaders who will virtually engage on a weekly basis with their school communities.

Again, the above is not the comprehensive solution; however, moving quickly on these and other items we hope is helpful.

If you have any questions or require additional information, please call Ruthie Quinto at 457-6225.

Approved by Superintendent
Robert G. Nelson Ed.D. __________________________ Date: 08/07/2020
Regarding: Recommendation to Approve Provisional Internship Permits

The purpose of this communication is to provide the Board information regarding the recommendation to approve the Provisional Internship Permits.

The Provisional Internship Permit (PIP) was created in response to the phasing out of emergency permits. It allows an employing agency to fill immediate staffing needs by rehiring a candidate who is enrolled in a credentialed program. The candidate will receive staff development targeted to the needs of our students and will be required to make progress in becoming fully credentialed.

Requirements for Initial Issuance and Renewals (Title 5 California Code Regulations, Section 20021.1)

- Initial issuance requirements require possession of a baccalaureate degree or higher from a regional accredited college or university, verification of passage of CBEST, and successful completion of course work for the permit type requested

- One-time renewal issuance requirement allows employing agency to request a one-time renewal of the PIP if the holder has taken all appropriate subject matter examinations (CSET) as determined by the college or university

If you have any questions or require additional information, please contact Paul Idsvoog at 457-3548.

Approved by Superintendent
Robert G. Nelson Ed.D.  Date: 08/07/2020
From the Office of the Superintendent
To the Members of the Board of Education
Prepared by: Paul Idsvoog, Chief of Human Resources
Cabinet Approval: Paul Idsvoog

Date: August 7, 2020
Phone Number: 457-3548

Regarding: Revised Job Descriptions for Benefits Eligibility Assistant, Workers’ Compensation Technician and Child Welfare Attendance Specialist positions

The purpose of this communication is to provide the Board additional information for an agenda item on the August 12, 2020 Board Agenda for the revised job description of the following positions:

- Benefits Eligibility Assistant
- Workers’ Compensation Technician
- Child Welfare Attendance Specialist

The job description revisions for the Benefits Eligibility Assistant and Workers’ Compensation Technician positions reflect the negotiated changes for these positions in accordance with the Side Letter of Agreement between California School Employees Associations (CSEA) and its Fresno White Collar #125 and the Fresno Unified School District dated June 25, 2020.

The job description revision for the Child Welfare Attendance Specialist position reflects the negotiated change for this position in accordance with the Side Letter of Agreement between Fresno Unified School District and the California School Employees Associations (CSEA) and its Fresno White Collar #125 dated September 30, 2019.

Each position is designated Classified, non-exempt; placement on the Classified Hourly Salary Schedule for the Benefits Eligibility Assistant position is on G-33, Workers’ Compensation Technician is on G-37, and Disability Retirement Technician is on G-37.

If you have any questions or require additional information, please contact Manjit Atwal at 457-3501.

Approved by Superintendent
Robert G. Nelson Ed.D.  Date: 08/07/2020
Regarding: Recommendation for Variable Term Waiver

The purpose of this communication is to provide the Board an explanation for the recommendation for the Variable Term Waiver for teachers that have exhausted the Provisional Internship Permit (PIP) and Short-Term Staff Permit (STSP). Due to the closure of test centers caused by the shelter-in-place orders, the California Commission on Teacher Credentialing has developed a Variable Term Waiver option to grant teachers one extra year on their PIP or STSP to allow them to continue to teach in the 2020/21 school year. With the issuance of the variable term waiver, teachers have an additional year to complete coursework and/or exams so they may become intern-eligible or obtain a preliminary credential for the 2021/22 school year.

Human Resources will submit the following name to the board on August 12, 2020:

Name       Site        Subject      Waiver
Mai N. Vang. Ahwahnee Mathematics Variable Term Waiver

If you have any questions or require additional information, please contact Paul Idsvoog at 457-3548.
From the Office of the Superintendent
To the Members of the Board of Education
Prepared by: Karin Temple, Chief Operating Officer
and Paul Idsvoog, Chief of Human Resources
Cabinet Approval: Karin Temple/Paul Idsvoog

Regarding: Revised/New Job Descriptions for Maintenance and Operations Department Positions

The purpose of this communication is to provide the Board additional information regarding item A-8 on the August 12, 2020 Board meeting agenda, recommending revised job descriptions for positions in the Maintenance and Operations Department represented by Fresno Teachers Association (FTA)-Trades and International Association of Mechanics and Aerospace Workers (IAMAW). The changes reflect negotiated salary schedules and the creation of Lead positions to replace differential assignments non-compliant with the district’s CalPERS retirement contributions. Lead positions, which report to Supervisors in the various Maintenance Shops, provide additional technical oversight with a pensionable compensatory incentive of 5% above the specific trade. The positions are listed below.

**FTA-Trades**

**Existing positions:** Boiler and Heating Equipment Mechanic, Electrician, Electronics Service Specialist, Floor Covering Worker, Glazier, HVAC and Refrigeration Mechanic, Irrigation Specialist, Painter, Lead Painter, Plumber, Roofer, Lead Roofer, Telecommunications Technician

**New positions:** Lead Electrician, Lead Electronics Service Specialist, Lead Equipment Operator II, Lead Glazier, Lead HVAC and Refrigeration Mechanic, Lead Irrigation Specialist, Lead Plumber

**IAMAW**

**Existing positions:** Carpenter, Lead Carpenter, Concrete Worker-Finisher, Locksmith, Metal Trades II, Vehicle and Equipment Mechanic, Vehicle Utilities Worker

**New positions:** Lead Locksmith, Lead Metal Trades II, Lead Vehicle and Equipment Mechanic,

If you have questions or need further information, please contact Jason Duke at 457-3260.
From the Office of the Superintendent  Date: August 7, 2020
To the Members of the Board of Education
Prepared by: Karin Temple, Chief Operating Officer  Phone Number: 457-3134
Cabinet Approval: KTemple

Regarding: Bond-Related Recommendations on August 12, 2020 Board Meeting Agenda

The purpose of this communication is to provide the Board additional information regarding five resolutions, related to the district’s facilities improvement program, recommended for adoption on the August 12, 2020 Board meeting agenda. The resolutions were received by the Board on June 17, 2020. Information on each is provided below.

B-27, Resolution 19-44: Authorizes $90 million Issuance of Measure X Bonds
• Final Measure X issuance
• Will provide funding for identified priority projects over the next approximately 24 months including:
  o Juan Felipe Herrera Elementary School
  o Hoover and McLane CTE facilities
  o Edison gym modernization and expansion
  o Bullard perimeter fencing
  o Del Mar and Jackson cafeteria reconstruction including air conditioning
  o Cafeteria air conditioning at Centennial, Dailey, Scandinavian and Wishon
  o Fresno and McLane auxiliary gyms (design and a portion of construction)
  o Safety and security improvements
  o Deferred maintenance and small capital projects
• Project implementation is pending Board approval

B-28, Resolution 19-45: Authorizes Issuance of General Obligation Refunding Bonds
• Takes advantage of current low interest rates by refunding (refinancing) general obligation refunding bonds issued in 2012 and general obligation bonds issued in 2014
• Will result in debt service savings to the district

B-29, Resolution 19-46: Authorizes Issuance of Lease Revenue Refunding Bonds
• Takes advantage of current low interest rates by refunding (refinancing) lease revenue bonds issued in 2006 to finance the district’s Nutrition Center
• Debt service on the bonds is budgeted in the Cafeteria Fund and paid from meal program revenues
• Will result in debt service savings to the district

B-30, Resolution 19-47: Authorizes Debt Service Estimate to be Provided to County of Fresno
• District to provide information to Auditor-Controller to place appropriate tax levies on annual rolls to cover debt service requirements of bonds expected to be issued during the fiscal year
• Currently planning for a Measure X bond issuance in September 2020 and a Measure M bond issuance in Spring 2021, pending Board approval
B-31, Resolution 19-48: Waiver Request to State Board of Education Regarding Issuance of Bonds

• Waiver, which must be approved by the State Board of Education, would allow the district to issue Measure X and Measure M bonds that may result in total outstanding bonded indebtedness exceeding 2.5% of taxable property within Fresno Unified

• Proposition 13 on the March 3, 2020 State ballot, which failed, would have increased debt capacity for school districts to 4% and the waiver would not be needed

• Waiver requests are frequently requested and granted

• Public hearing required to be conducted

If you have questions or need further information, please contact Karin Temple at 457-3134.
Regarding: Meal Distribution Program – Starting August 17, 2020

The purpose of this communication is to provide the Board information regarding plans for the district’s meal services starting with school opening. Currently, meals are being provided at 22 schools across the district. Beginning August 17, breakfast and lunch will be provided 7:00am-9:00am, Monday-Friday at 63 schools. This will provide a reliable and consistent daily source of nutritious meals for students, at locations convenient to all areas of the district and at a time least disruptive to the instructional day. The rotating menus will include grab-and-go meals and meals to be heated at home, with instructions. Meal distribution sites are listed below and may be adjusted as the school year progresses based on need and staffing.

- Middle Schools (11) – Cooper, Fort Miller, Hamilton, Kings Canyon, Scandinavian, Sequoia, Tehipite, Terronez, Tioga, Wawona, Yosemite
- High Schools (5) – Bullard, Duncan, Edison, Hoover, Sunnyside

Since school closure, the district has served over 3.7 million meals. From March 16-June 4, an average of 237,950 meals were provided weekly. The summer meals program began June 8 and the 100,600 weekly average meals served during summer break is significantly more than a typical summer. During spring/summer, the district has operated under a USDA program (Seamless Summer Option - SSO) that allows reimbursable meals to be provided to all children 1-18. This meets the needs of our families and streamlines the distribution process. Unless there is federal action in the near future, we will be required to serve only enrolled students, which will be cumbersome and reduce meal opportunities for families. The district is joining other agencies in requesting an extension of the SSO program.

Close to 20% of meals served to date have been for adult members of the community. Because these meals are not USDA-reimbursable, the cost is being supported by the district’s general fund at an estimated $2.6 million by the end of the summer. A proposal is being submitted to the City of Fresno to request an allocation from its CARES Act funding to pay for adult meals and potentially meals for non-enrolled students. If external funding for adult meals is not identified, the service may be discontinued.

If you have questions or need further information, please contact Karin Temple at 457-3134.
Regarding: Career Technical Education Facilities

The purpose of this communication is to provide the Board information regarding Career Technical Education (CTE) facilities. CTE facilities projects are identified and prioritized through alignment with local and state labor market demands for highly qualified skilled employees, student enrollment and capacity, and facility master planning. Each project utilized local business partners to provide industry insights on proposed equipment and spaces to ensure industry-relevant equipment and skills were offered to elevate student opportunities. Proposition 51, the Career Technical Education School Facilities Program, was placed on the November 2016 ballot, to supply grants to eligible schools for the purpose of improving and expanding their CTE programs. Proposition 51 was passed by California voters and $500,000,000 became available for this purpose. Awards for up to $3 million for new construction and up to $1.5 million for modernization of facilities were granted. Separate industry sector applications for each project were required and each application required letters of support from local business partners. The district received over 350 letters of support from local business and post-secondary partners throughout the three years of application submissions. Identified industry certifications, associated training and curriculum reviews by business partners bolstered the district’s applications. The State Allocation Board approved $125 million for round four and five of funding and $250 million for the final application round (round six). In rounds four and five, the district was awarded $12,607,733 for new and modernized CTE facilities. In December 2019, the district submitted five applications totaling $11,195,178. Fresno Unified’s round six applications all received funding-eligible scores and the district is waiting for funding notification for its submitted applications.

The following is an update on all submitted Proposition 51 CTE projects:

Duncan Polytechnical High School: new CTE facilities for Construction and Heavy Truck programs and modernization for the Automotive Lab, Welding and Mechatronics programs. The project was awarded $5,154,187 from the state and the district utilized Measure Q funds for the matching fund requirement. Projects were completed in March 2019.

Fresno High School: new CTE facilities for Construction & Building Trades, HVAC, Engineering & Design, and Arts, Media & Entertainment International Baccalaureate Career Programmes (IBCP). The project was awarded $2,378,386 in the first two rounds of funding. The district is waiting for funding notification from the state for the final application; round six funding request is $1,888,000. Construction of the new facility was approved by the Board on April 1, 2020 and Measure X funds were allocated for the project. If the round six application is funded, $1,888,000 in Measure X funding would become available. The underground infrastructure has begun, and the new facility is scheduled to be complete in August 2021.

Hoover High School: reconfiguration of facilities for Art, Media & Entertainment program. The project was awarded $623,385 and the district plans to utilize Measure X funds for the matching fund requirement. Bid proposals for the project and an anticipated final funding agreement from the state
are expected in August 2020. With Board approval, the project will commence in October 2020 with a scheduled completion date of March 2021.

McLane High School: reconfiguration of facilities for Art Venture. The project was awarded $603,332 and the district plans to utilize Measure X funds for the matching fund requirement. Bid proposals for the project and an anticipated final funding agreement from the state are expected in August 2020. With Board approval, the project will commence in October 2020 with a scheduled completion date of March 2021.

Hoover High School: reconfiguration of facilities for its Construction program. The project was awarded $848,442 and the district plans to utilize Measure X funds for the matching fund requirement. To meet funding qualifications, both the Division of the State Architect and the California Department of Education must approve the submitted plans no later than September 24, 2020. Once building plans are approved, the district has 90 days to file the SAB 50-05 form requesting the funding and 18 months to have construction contracts in place to access the $848,442 in Proposition 51 dollars.

Duncan Polytechnical High School: new CTE facilities for its Pharmacy, Rehabilitation Therapy and Certified Nursing Assistant programs. The project was awarded $3,000,000 and highlights: five CTE classrooms, four CTE/science classrooms, and a collaboration space. Funding for the project was marketed through Measure X funds. The CTE classrooms were designed with extensive request and input from advisory partners to meet the growing workforce development demands of the healthcare industry. To meet funding qualifications, both the Division of the State Architect and the California Department of Education must approve the submitted plans no later than September 24, 2020. Once building plans are approved, the district has 90 days to file the SAB 50-05 form requesting the funding and 18 months to have construction contracts in place to access the $3,000,000 in Proposition 51 dollars.

Edison High School: new CTE facilities for Engineering, Robotics, Biomedicine, Sports Medicine and Computer Science programs. The two-story building plans highlight: 13 CTE classrooms, a robotics lab, and a large presentation area. All three round six applications received funding-eligible scores and requested $6,307,179 of $15,775,000 project costs. Funding letters were scheduled to be received in July 2020, but the Office of Public-School Construction has delayed notification due to COVID-19 impacts.

Sunnyside High School: new CTE facilities for its Health and Human Services Pathway. The building plans highlight: four CTE classrooms, an athletic training lab, rehabilitation therapy lab, collaboration spaces, and an outdoor training and fitness court. This round six application received a funding-eligible score and requested $3,000,000 of $7,740,000 project costs. Funding letters were scheduled to be received in July 2020, but the Office of Public-School Construction has delayed notification due to COVID-19 impacts.

As future bond measures are approved and facility grant dollars become available we will continue to pursue CTE facilities funds to accommodate growing programs that include Roosevelt High School, Bullard High School, and the Urban Design Academy.

If you have any questions or require additional information, please contact Jeremy Ward at 248-7565.

Approved by Superintendent
Robert G. Nelson Ed.D. _______________ Date: 08/07/2020