

Board Report for November 16, 2010

Michael A. Smith, Interim Executive Director

1. Transportation:

As a result of the letter summarizing the first month of transportation issues with LAUSD indicating the continued late arrival of the LAUSD buses and the negative academic impact on our students, a change has occurred. Beginning Thursday, October 28, 2010 Pali High traveling students now have their own set of buses. We no longer share with the traveling students attending Paul Revere MS. A few glitches came up the first couple of days but were resolved immediately and now we have our students arriving on time for class and able to have breakfast if they choose. Currently we still have only one dismissal after 7<sup>th</sup> period. However, Ms. Haskin met with Mr. Cortines to discuss the possibility of going back to a dual dismissal which would save PCHS considerable money by not having to provide study hall. The result of her meeting was that Mr. Cortines directed Mr. Enrique Boull't, LAUSD Director of Transportation, to look into the cost and possibility of providing dual dismissal buses. We should hear the results by the middle of the coming week.

2. Maggie Gilbert Aquatic Center:

The MGAC is fully operational and providing swim lessons through our P.E. department during the instructional day, and a wonderful practice facility for our Pali High Swim Team. Swim lessons for the community are available through several outside organizations. We have signed permit user agreements with Westside Aquatics, Southern California Aquatics (SCAQ), Tower 26, Team Santa Monica (TSN) and a scuba diving class. In addition, the pool is opened for general lap swimming, to the public, first thing in the morning, during lunch and after school. The first major swim meet held at MGAC was November 6<sup>th</sup> and 7<sup>th</sup> sponsored by Westside Aquatics.

3. Fund raising Update:

The Annual Giving Campaign collaborative effort with the Booster Club is proceeding along. So far the Booster club has given the school \$33,202 as our 50% of money raised by October 15, 2010. The Booster Club members are conducting their annual Phone-a-thon tonight, 11/16/10, reaching out for donations. Their hard work, on behalf of our faculty, staff and students is truly a great gift. The Northern Trust Open's "Tickets For Charity" program, where all funds raised will go directly to transportation budget needs, got a large boost from Mr. Jerry West. The former Lakers great was the guest speaker at the Palisades Chamber of Commerce Membership Breakfast held at the Riviera Country Club on Friday, November 12, 2010. He spoke to the opportunity to generate funds for

PHCS and see some of the best golfers in the world. We hope this will stimulate sales for PCHS.

4. UTLA-PCHS and PEPSU Update:

The law firm of Middleton, Young and Minney has continued reaching out to PESPU representative Penny Upton to set a date and time to sit down and open negotiations for this year. To date there has not been a date where all participants were available.

5. Village Fair:

Pali High hosted the Palisades Chamber of Commerce Village Fair on Sunday, October 31, 2010 from 11:00 am – 3:00 pm. Having a Halloween theme, there was a costume contest, chili cook off, other assorted food booths, petting zoo, face painting, rides, games and a great haunted house, thanks to the PCHS leadership class. Both Marcia and I made it through the Haunted House as they gave us the “scary light” treatment. Comments were favorable and everyone, young and old, seemed to have a great time. We are considering being the permanent location for this annual community event.

6. Community Forum Meeting:

Following the Village Fair, a Community Forum meeting was held in the Pali High library to hear concerns from our neighbors on El Medio and Radcliffe Avenues. Marcia Haskin, Maisha-Cole Perri and I met with twenty residents who shared some of their concerns as related to being a neighbor of a large comprehensive high school. The concerns expressed fell into two major categories; student behavior and school activities. On the student side, the concerns focused on speeding down residential streets, parking, leaving litter, graffiti, trampling landscaped areas, being noisy and generally being disrespectful to residents. On the school activities side; the noise from the football field and swimming pool, the lights from both of those venues, and lack of security in the neighborhood when Pali students are arriving, going to lunch in the Village and being dismissed. An email distribution list was created, from those attending, as a first step to establishing a channel for communicating. Its first use was to notify the residents of the swim meet held the weekend of November 6<sup>th</sup> and 7<sup>th</sup>. I also included a piece in my message to parents, in the Parents’ E-Newsletter, asking for their support in discussing good neighbor behavior when their students are in the community. One immediate change we are looking into is freeing up the stadium parking lot so students can park their cars there instead of on El Medio and Radcliffe Avenues. In the past, we allowed the buses from Global Transportation and LAUSD to park their buses during the school day. We are looking for alternative space, for the buses, so our students can park there instead of on the residential streets.

**PRINCIPAL'S REPORT**  
**WEDNESDAY, NOVEMBER 10, 2010**

Dear Board,

Much has happened in the past seven weeks!

I want to thank each and every one of you for the support that you have displayed since the start of the school year. We have no limits with this continued collaboration and support from our entire Pali community.

**Village Fair**

Sunday, October 31, 2010 was a fantastic day at Pali! The Chamber of Commerce sponsored the annual Village Fair on our very own quad. What a fun-filled day for our families: Bouncers, pony rides, entertainment, food booths, rides, and community vendors.

A special "thank you" goes to Greg Wood, Michael Smith, Maisha Cole-Perri, parent volunteers and Celeste Fraley and the Leadership Class who built and operated a frightening Haunted House!

Maisha also won Second Place for her pumpkin pie!!!

**Community Forum**

Mike Smith, Maisha-Cole Perri and I attended a Community Forum meeting following the Village Fair on Sunday, October 31. The purpose of the meeting was to address the ongoing concerns of the community in terms of noise levels, parking, etc. that have existed for several years.

Safety was mentioned as a serious issue with regard to traffic around the school. Parents, please be advised to NOT double park while picking up students after school. We must ensure safe egress and ingress from our campus. Thank you for your cooperation!

**Pool Opening**

A huge congratulations and "thank you" go to the entire pool committee who worked laboriously over a three-year period and to Rose Gilbert for ensuring the fruition of Rose's dream: an Aquatic Center established in memory of her beloved daughter Maggie.

Thanks also go to Executive Director Michael A. Smith who joined the Pali community in July and was charged with overseeing the completion and opening of the Aquatic Center.

The result of this teamwork was the fabulous "Pool Splash" that was held on October 10, 2010 for the Pali community.

Full coverage of the event was provided in the Palisadian Post last week.

**Back-to-School Night**

What an evening for the Pali community last Wednesday, October 13!

We hosted over 1200 parents for our Back-to-School Night.

Thanks to Richard Thomas for organizing the event and to all of the faculty, staff and parents who made this the superlative evening it was.

In my travels around the campus, I was so proud to see overflowing classrooms and our fabulous teachers.

Parents continued to stop me this year on their way to classrooms to tell me how excited and ecstatic they were to have their child at Pali.

#### **"Learning Walks"**

Small groups of administrators are visiting classrooms for 8-10 minutes as part of our weekly Administrative Team meetings. These are "learning walks", during which the administrative team breaks into groups and observes classrooms.

The purpose is to observe several "look-fors"; the team then returns to my office and de-briefs their observations.

Through the discussion that ensues with the team, we are able to calibrate our observations and arrive at a mindset that allows for equitable evaluations throughout the departments.

The focus of these observations is the following:

- a. What are the students doing?
- b. Are the students engaged?
- c. What evidence of follow-up to PLC work is evident in the lesson?

All observations, evaluations and follow-up conferences at Pali, under my leadership, are for the sole purpose of SUPPORT.

I am available any time if you have any questions regarding observations.

I consider this work to be the single most important Professional Development a school can undertake.

#### **Professional Development Tuesday**

Tuesday, October 26, 2010 was our Professional Development day with the UCLA/SMP team.

This was the start of the critical selection process at Pali in the search for permanent leaders. Parents will be notified as to a meeting date with the UCLA team in the near future.

I am very excited about our work with this extraordinary team.

The Board has already launched the year with their own session at the last Board meeting.

#### **Principal Chat**

I am holding Principal Chats every other Wednesday to provide opportunities for open dialogue with regard to any and all Pali issues.

#### **Great Shakeout**

The Great Shakeout Drill took place on Thursday, October 21, with a revised bell schedule.

Thanks to Monica Iannessa's organizational skills, we managed to minimize loss of instructional time by providing a Period 4 class.

**Sexual Harassment/Bullying**

As you well know, I and the administrative team take bullying of any sort very seriously.

We take great pains to create a campus that is tolerant and teaches respect for one another and for diversity of all kinds.

I am tremendously grateful to all of our teachers for promulgating that ambience everyday in their classrooms and on the campus at Pali.

I announced on the P.A. the severe consequences students face if they are found to be engaged in cyber bullying or any other sort of harassment, student on student, on campus or from home.

Monica, Russ and I will be stopping in for 5-minutes or so in the coming weeks to talk to Social Studies classes about the seriousness of bullying and its consequences at Pali.

I appreciate your cooperation and support in this regard. I have received several emails from faculty, supporting my recent shut-down of the use of Facebook while at school.

In closing, I truly feel we have begun this school year on a positive and exciting note.

We are all focused on the students and the purpose of our existence at Pali: to provide a challenging, safe, and academically enriching atmosphere for our student body.

I am paving the way for permanent leadership with every step I take at Pali in 2010-11.

Thank you for all that you do and for your ongoing support and loyalty.

Always,  
Marcia

**PRINCIPAL'S BOARD REPORT**  
**PART 2**

**UCLA/SMP UPDATE:**

The UCLA team met with the faculty two weeks ago for a Professional Development Leadership session. The result of that work was the following decision: the Pali faculty voted that it is their desire to hire one person who will serve as the Academic Leader, reporting directly to the Board.

Following that work with the faculty, the UCLA team scheduled a "Community-Wide Vision/Mission Alignment Process" on Monday, November 15, 2010.

The purpose of the sessions with cross-stakeholder participation throughout the entire day and evening was as follows:

- A. An effective process for hiring leaders who are a good match for Pali demands clarity with regard to the vision/mission that a leader must support.
- B. Clarity with regard to vision/mission supports a job description(s) that is simple and straightforward.
- C. Clarity with regard to vision/mission assures an advertisement to announce the position that inspires the kind of potential candidates that the school wants.
- D. Clarity with regard to vision/mission fosters a Pali community where stakeholders work in concert to support the success of a leader with a common understanding of what the vision/mission means.

The importance of all stakeholder groups meeting to define the meaning of vision/mission together cannot be underestimated. It was the most important first step in the Leader Selection process.

**PEER ASSISTANCE REVIEW (PAR) PROGRAM**

Four National Board Certified (NBC) teachers met with Marcia Haskin last week to begin the process of developing a PAR Program germane to the needs of teachers at PCHS.

The purpose of a PAR Program is to intercede at an early stage and offer assistance to teachers in need of mentoring, guidance and direction. A total of six teachers will write the guidelines and program; however, all NBC teachers will be eligible to participate as PAR teachers.

The program will also be offered for Salary Point Credit for those desiring this benefit.

The PAR development team is studying nationwide programs and researching various models on which to form its own foundation.

The team expects to be fully operational in February.

**ATTENDANCE PLAN**

Thanks to the dedicated work of Monica Iannessa, Director of Attendance, the PCHS Attendance Plan for 2010-11 is in full swing.

Automatic letters from the district were sent home to address truanancies while ConnectEd calls are placed to all absentees on a daily basis.

Family Module for ISIS is active, allowing parents access to their student's attendance record and progress report grades on-line.

The most exciting component of the Attendance Plan is the implementation of a Mini-SARB (Student Attendance Review Board) at Pali.

Students with four or more absences (179 to date) are being tracked by attendance, counseling, the Deans' Office, and the Special Education Office.

Chronic absentees and their parents will meet with an administrator, counselor and staff member to determine mitigations for absenteeism.

The Pali Positive Attendance Program is in full force. Weekly drawings are held for students with Perfect Attendance. Pali gear, tickets to sports events, school event tickets and gift certificates have been given away since the first week of school.

# **PCHS Common Assessments**

## **2011 Quarterly Report 11/8/10**

PLC	# Common Assessments
9th English	1
10th English	0
11th English	0.15
12th English	0
Literacy	0
World Cultures	0
World History	1
US History	4
Government/Econ	3
Spanish 1	0
Spanish 2	0
Spanish 3	0
French	0
Native Speakers	0
Math Essentials	0
Alg. 1	1
Alg. 1B	1
Geometry	2
Alg. 2	1
Math Analysis	0
ICS	4
Biology	2
Chemistry	0.3
VAPA	0
Tech Ed.	0
PE 9	0
PE 10	0

If a PLC administered a common assessment to less than half of the students in the PLC, then it is noted by a fraction.





**PALISADES CHARTER HIGH SCHOOL  
CBO REPORT  
NOVEMBER 16, 2010 BOARD MEETING**

**2009-2010 Updates**

- The outside auditors will be at PCHS this month to complete the Financial Audit Report due December 15, 2010.
  - LAUSD has requested a financial reporting on 2009-2010 PCHS Special Expenditures to justify PCHS Special Education funding. This work will be performed this month.
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**2010-2011 Update**

**Attendance**

- ADA- At the end of Month Two (40 days of instruction), our enrollment was 2,867. Per grade level: 811-9<sup>th</sup>, 759-10<sup>th</sup>, 744-11<sup>th</sup> & 554-12<sup>th</sup> (includes Temescal 68 enrolled students, down 5 from September). PCHS' cumulative ADA was 2,763.4 (at 96.8%). Budgeted ADA for the Year is 2,743. Projected ADA is 2,710.

**Here are the 2010-2011 Budget Updates:**

- 2010-2011 Funding Levels per ADA- State legislature finally approved a budget in October. Enclosed is the projected impact of the new funding levels based upon updated ADA & known expenditures which projects a general fund surplus. To meet the continued \$10 billion Deficit, the State of California has deferred the timing some of the revenues PCHS will receive into 2010-2011. Given the status of the State Budget and continued unknowns of PCHS revenues/expenditures, I recommend PCHS exercise caution before potentially increasing the current 2010-2011 Budget. Any budget revisions should be vetted through the Budget & Finance committee.

**PALISADES CHARTER HIGH SCHOOL  
CBO REPORT  
NOVEMBER 16, 2010 BOARD MEETING**

- **The First Interim Financial Report will be filed with the CDE by December 15, 2010 and will be presented to the Board.**
- **Transportation- PCHS is still in discussion with LAUSD to finalize the transportation MOU and the related charges for the actual number of students riding on LAUSD buses.**
- **PCHS has been billed by LAUSD for retroactive Custodial charges totaling \$290,000 for the last three school years. We are disputing this charge and have requested detail statements from them to substantiate these charges.**
- **Cafeteria-PCHS met with the Sodexo Regional V.P. last week to discuss our relationship and goals for 2010-2011.**

**Pool Updates**

- **Pool Accounting Update to October 30,2010 (see attached)**

V.C.

**PCHS Financials**  
**Profit & Loss Statement**  
**At November 10,2010**

2010-2011			
	Approved Budget	Updated Projection	COMMENTS
ADA	<u>2,743</u>	<u>2,710</u>	Projected from Per. 2 ADA
<b>Revenue:</b>			
Revenue Limit Sources	\$12,329,439	\$ 13,090,589	Updated ADA Funding approved by State
Federal Revenues	1,173,545	1,750,792	Federal Jobs Funding
Other State Revenues	3,930,360	3,874,989	
Other Local Revenues	5,026,687	5,074,157	
Total Revenues	<u>22,460,032</u>	<u>23,790,528</u>	
<b>Expenses:</b>			
Certificated salaries	10,330,623	10,422,623	Study Hall Estimated Costs
Classified Salaries	2,863,779	2,863,779	
Total employee benefits	4,305,860	4,313,450	
Total Salary & Benefits	<u>17,500,262</u>	<u>17,599,852</u>	
Books and supplies	1,410,903	1,410,903	
Services & other operating expense	2,902,513	2,902,513	Potential Add'l Transportation Costs still unknown
Capital Outlays	166,523	166,523	Excludes Pool Construction Expenditures
Facility use fee to LAUSD	428,077	678,077	Est. Additional Fees to LAUSD for Facility Use Fees from 2009/10 not billed
Subtotal-Operating Expenses	<u>22,408,277</u>	<u>22,757,867</u>	
Debt service	90,200	90,200	
Principal repayment	319,800	319,800	
Total debt service	<u>410,000</u>	<u>410,000</u>	
Total Expenses	<u>22,818,277</u>	<u>23,167,867</u>	
Net General Fund Addition/(Reduction)	\$ (358,245)	\$ 622,661	

V.C

**PALISADES CHARTER HIGH SCHOOL  
POOL FUND DONATIONS ACCOUNTING  
As Of October 31, 2010**

**Revenue**

		<u>Amount Received</u>
	<b><u>Donations</u></b>	
2006	Mar-Dec	\$ 457,158.33
2007	Year To Date	\$ 292,310.30
2008	Year To Date	\$ 1,893,673.13
2009	Year To Date	\$ 278,146.33
2010	January	\$ 86,616.34
	February	\$ 3,850.00
	March	\$ 11,230.50
	April	\$ 1,264.00
	May	\$ 6,617.50
	June	\$ 9,410.00
	Year To Date	\$ 118,988.34
	July	\$ 5,306.25
	August	\$ 23,774.42
	September	\$ 1,600.00
	October	\$ 4,355.00
	Cumulative Donations	\$ 3,075,312.10

	<b><u>Interest</u></b>	
2006	3/1-12/31	\$ 8,783.88
2007	1/1-12/31	\$ 19,992.43
2008	Year To Date	44,185.34
2009	Year To Date	27,019.58
2010	January	\$ 165.03
	February	75.25
	March	222.33
	April	212.32
	May	141.49
	June	60.74
2010	Year To Date	877.16

**PLEDGES OUTSTANDING**

Ross Family	\$ 15,000
Rose G.-Lane	50,000
Boosters	25,000
Kaplan	10,000
	<u>\$ 100,000</u>

V.C

**PALISADES CHARTER HIGH SCHOOL  
POOL FUND DONATIONS ACCOUNTING  
As Of October 31, 2010**

July	12.19
August	10.92
September	4.57
October	0.41
Cumulative Interest	<u>\$ 100,886.48</u>
Total Revenue to Date	\$ 3,176,198.58
Loans Received: Gilbert	\$ 750,000.00
:BOTW	\$ 1,000,000.00
Loans Available: BOTW	\$ -
	<u>\$ 4,926,198.58</u>
Add: Pledges Outstanding	\$ 100,000.00
Total Sources of Pool Funds	<u>\$ 5,026,198.58</u>

**Expenses**

2006	3/1-12/31	\$ 4,863.93
2007	1/1-12/31	\$ 123,586.81
2008	Year To Date	<u>\$ 209,463.29</u>
2009	Year To Date	<u>\$ 2,256,227.27</u>
2010	January	\$ 93,718.70
	February	163,961.72
	March	260,790.16
	April	233,788.08
	May	267,596.64
	June-	203,230.64
	July	179,911.67
	August	317,090.60
	September	236,778.27
	October	278,923.14
Cumulative Expense Year To Date		<u>\$ 2,235,789.62</u>
Cumulative Expenses to Date		<u>4,829,930.92</u>

Net Pool Balance-October 31,2010 \$ 96,267.66

**Investments at October 31,2010**

BOTW Pool Account	\$ 64,810.74	
Wells Fargo Operating Account	17,937.97	No Interest
Wells Fargo Money Market Account	5,367.47	Tiered Money Market- Variable
Cal National Money Market Account	8,151.48	Tiered Money Market- Variable
	<u>\$ 96,267.66</u>	





A CALIFORNIA DISTINGUISHED SCHOOL

## **Human Resources Report November 16, 2010**

- Wellness Day – date TBD early 2011
- Health Benefits
  - Open Enrollment for Flexible Spending Accounts (Health and Dependent Care)  
November 1 - 15
- Recruitment Update –

### Pending Positions

- Science Teacher –
- LVN/Asst
- Lifeguards – on going
- Operations/Transportation Assistant





# **Palisades Charter High School**

**July 1, 2009**

## **FASB 106 Actuarial Valuation Retiree Health Program**

Prepared by  
The Epler Company  
November 16, 2010

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## **Palisades Charter High School Purpose of Actuarial Valuation**

- Estimate Current Liability for Retiree Health Benefits
- Determine Accounting Requirements Under FAS 106 & Other Standards Applicable to Retiree Health Benefits
- Present Sample Funding Alternatives

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## Palisades Charter High School FAS 106 Background

- Applicable to Publicly Traded Companies & Not-For-Profit Organizations Offering Retiree Health Benefits
- Before FAS 106: Pay-As-You-Go (PAYGO) Accounting
  - May not have current retiree health expenses but promises of future benefits
- Requires:
  - Annual actuarial valuation of expected postretirement benefit obligation (EPBO) and accrued postretirement benefit obligation (APBO)
  - “Correct” balance sheet liability is unfunded APBO
  - Accrual accounting versus cash (PAYGO) accounting
  - Covered benefits: Postretirement welfare benefits such as medical, dental, vision & life insurance
- Accounting Standard Only; Does Not Require Funding

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## Palisades Charter High School Retiree Health Benefits

- PCHS Provides Continuation of Medical, Dental & Vision Benefits to Eligible Employees at Retirement
- Eligibility: Varies based on date of hire & retirement from PCHS; in general
  - Prior to 3/12/84 – 5 years of service at retirement
  - Between 3/12/84 & 6/30/87 – 10 years of service at retirement
  - Between 7/1/87 & 5/31/92 – 15 years of service at retirement
  - After 5/31/92 – Rule of 80 (with at least 15 years of service if hired after 2/28/2007)
  - PCHS (except PESPU) employees hired on or after 7/1/2009 are no longer eligible for retiree health benefits
- PCHS’s Contribution:
  - 100% of the cost for medical, dental and vision benefits for the retiree & eligible dependents
  - Payable for the lifetime of the eligible retiree
  - Integrated with Medicare

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### **Palisades Charter High School Background Information**

- As of Valuation Date:
  - 165 active employees
  - 0 retired employees
- 2009/2010 Payments for Retiree Health Benefits = \$5515
- Currently No FASB Eligible Pre-Funding for Retiree Health Benefits
  - Excludes assets set aside in designated reserve account

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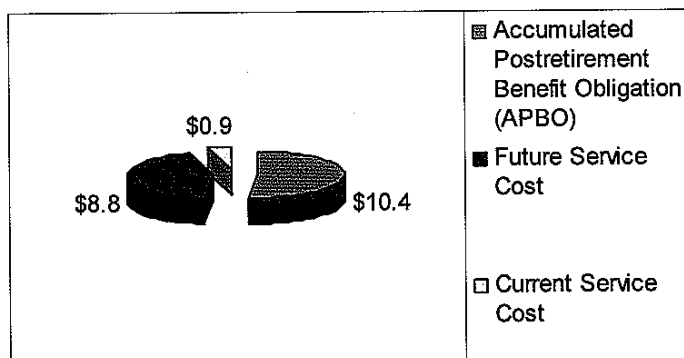
### **Palisades Charter High School Actuarial Valuation**

- Project Retiree Health Benefits Expected to be Paid by PCHS for Future Year (Projected Cash Flows)
  - Demographic Assumptions (to determine number of retirees in each future years): e.g. mortality, withdrawal, retirement
  - Financial Assumptions (to determine how much health care will cost in future years): E.g. discount (interest) rate, healthcare costs, healthcare trend
- Discount Projected Cash Flows to Measurement Date to Determine Present Value of PCHS's Retiree Health Benefit Payments (Expected Postretirement Benefit Obligation or EPBO)
- Allocate Present Value to the Past Period (Accumulated Postretirement Benefit Obligation or APBO), to the Current Period (Current Service Cost) & to the Future (Future Service Cost)

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### Palisades Charter High School Valuation Results\* at July 1, 2009

Total Projected Retiree Health Benefit Payments = \$121.2M  
 Actuarial Liability (Expected Postretirement Benefit Obligation or EPBO) =  
 Present Value of Retiree Health Benefit Payments = \$20.1M  
 Accrued Liability (Accrued Postretirement Benefit Obligation or APBO) = \$10.4M



\*Using 6% Discount Rate

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### Palisades Charter High School FAS 106 Valuation Results

- Initial Funded Status at July 1, 2009 = \$10.4M
- Net Periodic Postretirement Benefit Cost (Accrual Expense) for 2009/10 Fiscal Year = \$2.0M
  - Service Cost Plus
  - Interest Cost on APBO Less
  - Return on Assets Plus
  - Amortizations (Includes transition obligation, gains/losses, plan changes)
- Projected Funded Status at June 30, 2010 = \$11.9M
- PCHS Reported \$1.6M of Assets in Designated Reserve Account or 13% of Balance Sheet Liability

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## Palisades Charter High School Management of Retiree Health Liability

- Review Plan Cost Containment Strategies
- Review Retiree Health Benefit Promise
  - Eligibility
  - Benefits Offered
  - Duration of Benefits
  - PCHS's Financial Obligation (% paid, caps or limit % increase, etc)
- Review Prefunding Strategies
  - Eligible Plan Assets: Segregated & Restricted (usually in trust) for Exclusive Payment of Retiree Health Benefits & Secured from Creditors
  - Reasons to Prefund:
    - Mitigates Impact of Liability
    - Earlier Contributions; Less Contributions Required in Aggregate
    - Higher Rate of Return Under Long Term Investment Strategy - Lowers Liability/Expense
    - Increase Financial Stability/Benefit Security

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## Palisades Charter High School Sample Funding Alternatives\*

- Continue PAYGO Funding (no prefunding)
  - Pay actual retiree benefit cost each year
  - No asset leveraging
  - See Section III of valuation report for expected cash flows (approx. \$121M over time)
- Pre-fund Present Value of Expected Cash Flows or \$20.1M – If assets return 6% should have enough to pay expected cash flows
- Pre-fund Accrual Expense (Net Periodic Postretirement Benefit Cost) – Initially \$2.0M; will vary in future years based on demographics

\*Based on 6% asset rate of return

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## Palisades Charter High School Sample Funding Alternatives\*

- Pre-fund Recommended Contribution – Initially \$1.6M; will vary in future years based on demographics but targets full funding in approximately 30 years
- Pre-fund Level Dollar Amount:
  - 20 years - \$1.8M
  - 25 years - \$1.6M
  - 30 years - \$1.5M
  - 40 years - \$1.3M
- Pre-fund Level Percentage of Pay:
  - 20 years - 14.3%
  - 25 years - 12.1%
  - 30 years - 10.7%
  - 40 years - 9.0%

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## Questions

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The

EPLER

Company

BENEFITS AND COMPENSATION  
CONSULTANTS AND ACTUARIES

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Facsimile (619) 239-0807  
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November 5, 2010

**PRIVATE**

Mr. Greg Wood  
Chief Business Officer  
Palisades Charter High School  
15777 Bowdoin Street  
Pacific Palisades, CA 90272

Re: Palisades Charter High School Actuarial Valuation

Dear Mr. Wood:

We are presenting our report of the actuarial valuation conducted on behalf of the Palisades Charter High School (PCHS) for its retiree health program.

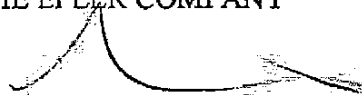
The purpose of the report is to measure PCHS's liability for postretirement health benefits and to determine PCHS's accounting requirements under the Financial Accounting Standard Board Statement No. 106 (FAS 106).

The Epler Company is a San Diego-based, independently owned actuarial, benefits and compensation consulting firm specializing in group health, retiree health valuations, and qualified pension plan valuations. We have set forth the results of the valuation in this report.

We have enjoyed working on this assignment and are available to answer any questions.

Sincerely,

THE EPLER COMPANY



Marilyn K Jones, ASA, MAAA, EA  
Vice President and Actuary

MKJ:rl  
Enclosure

As required by U.S. Treasury Regulations governing tax practice, IRS Circular 230 Tax Advice Disclaimer, you are hereby advised that any written tax advice contained herein was not written or intended to be used (and cannot be used) by any taxpayer for the purpose of avoiding penalties that may be imposed under the U.S. Internal Revenue Code.



V.I.A.

# **Palisades Charter High School**

**Actuarial Valuation  
Retiree Health Program  
As of July 1, 2009**

Prepared by:

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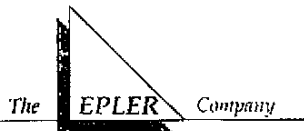
January 2010



**Palisades Charter High School  
Actuarial Valuation  
Retiree Health Program  
As of July 1, 2009**

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## Section I. Executive Summary

### Background

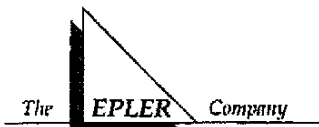
At the request of Palisades Charter High School (PCHS), The Epler Company has performed an actuarial valuation of PCHS postretirement health benefits as of July 1, 2009. The valuation covers future retirees of PCHS and was prepared in accordance with the assumptions and methods specified by FAS 106 – Accounting for Postretirement Benefits Other Than Pensions. Our calculations were prepared assuming PCHS adopts FAS 106 accounting for its 2009/2010 fiscal year and elects to amortize the initial transition obligation over 20 years. Currently there are no FAS eligible plan assets set aside for the funding of postretirement health benefits but the valuation includes funding alternatives that could be adopted by PCHS.

PCHS provides for the continuation of retiree health benefits to eligible employees at retirement. Retiree health benefits include medical, prescription drug, dental and vision coverage. PCHS currently pays the cost of coverage for the retiree and any covered dependents during the lifetime of the retiree. Eligibility for retiree health benefits varies based on when an employee was hired. Employees hired on or after July 1, 2009 except PESPU employees are not eligible for PCHS-paid retiree health benefits. Section V of the report details the plan provisions applicable to each employee group.

PCHS currently provides medical, dental and vision benefits to approximately 165 eligible active employees. As of the Measurement Date there were no retirees eligible for benefits. The valuation excluded any employee who returned to or was scheduled to return to LAUSD. Detailed information on the census data included in the valuation is presented in Section VI of the report.

### Results of the Retiree Health Valuation

We have determined the actuarial liability or expected postretirement benefit obligation (EPBO) for the PCHS retiree health plan, as of July 1, 2009, is \$20,092,578. This represents the present value of all benefits projected to be paid by PCHS for future retirees. If PCHS were to place this amount in a fund earning interest at the rate of 6% per year, and all other actuarial assumptions were exactly met, the fund would have exactly enough to pay all expected benefits. The valuation does not consider employees not yet hired as of the valuation date. This actuarial liability is apportioned into the past service, current service and future service components using the projected unit credit cost method as required under FAS 106. The past service component is



referred to as the accumulated postretirement benefit obligation or APBO and the current service component is referred to as the service cost. The APBO at July 1, 2009 is \$10,371,867 and the service cost for the 2009/2010 fiscal year is \$876,119.

Changes from Prior Valuation

The valuation reflects assumption, demographic and healthcare cost changes since the prior valuation. A reconciliation of the change in the actuarial liability from the prior valuation is provided in the following table:

<b>July 1, 2007 Valuation – 5.0% Discount Rate</b>	<b>\$24.6 Million</b>
Expected increase due to passage of time (interest)	\$ 2.2 Million
Increase due to new entrants	\$ 0.7 Million
Decrease due to net experience gain (primarily due to employees returning to LAUSD)	( \$ 2.6 Million)
Increase due to demographic assumption changes	<u>\$ 1.0 Million</u>
<b>July 1, 2009 Valuation – 5.0% Discount Rate</b>	<b>\$25.9 Million</b>
Decrease due change to in discount rate	<u>( \$ 5.8 Million)</u>
<b>July 1, 2009 Valuation – 6.0% Discount Rate</b>	<b>\$20.1 Million</b>

Fiscal Year 2009/2010 Net Periodic Postretirement Benefit Cost (Expense)

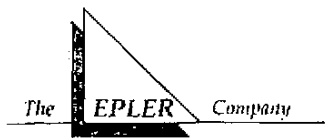
The results of the valuation including a reconciliation of the funded status of the plan and the development of the fiscal year 2009/2010 net periodic postretirement benefit cost (expense) are presented in Section IIA through IIC of the report. The APBO at July 1, 2009 for PCHS's postretirement health benefits is \$10,371,867. This initial APBO (transition obligation) is being amortized over 20 years on a straight-line basis (separate interest component). The fiscal year 2009/2010 net periodic postretirement benefit cost (expense) is \$2,017,024. This amount includes the current service cost, the interest cost on the APBO and the annual amortization of the initial transition obligation. This compares to the projected pay-as-you-go cost of \$0. A sample disclosure on the information required for the financial statement at June 30, 2010 is provided in Section IIE of the report. An actual disclosure can be provided at the end of the fiscal year when actual benefit payments and employer contributions are available.



## Funding

PCHS has not informed us of any funds eligible as plan assets under FAS 106. Under FAS 106, assets cannot be considered as employer contributions or plan assets unless they are segregated and restricted (usually in a trust) to be used for postretirement benefits. Currently, PCHS funds for retiree health benefits on a pay-as-you-go basis but has set aside monies earmarked for the payment of future retiree health benefits. Section IV of the report provides sample funding strategies determined assuming different asset return rates, different payment patterns and different payment periods.

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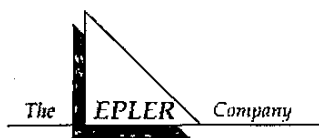
**Section II. Financial Results**

**A. Valuation Results as of July 1, 2009**

The table below presents the employer liabilities associated with PCHS's retiree health benefits determined in accordance with FAS 106. The expected postretirement benefit obligation (EPBO) is the present value of all benefits projected to be paid under the program. The accumulated postretirement benefit obligation (APBO) reflects the amount attributable to the past service of current employees and retirees. The service cost reflects the accrual attributable for the current period.

<b>1. Expected Postretirement Benefit Obligation (EPBO)</b>	
Actives Not Fully Eligible	\$17,141,300
Actives Fully Eligible	2,951,278
Retirees	<u>0</u>
Total EPBO	\$20,092,578
<b>2. Accumulated Postretirement Benefit Obligation (APBO)</b>	
Actives Not Fully Eligible	\$7,420,589
Actives Fully Eligible	2,951,278
Retirees	<u>0</u>
Total APBO	\$10,371,867
<b>3. Service Cost</b>	<b>\$ 876,119</b>
 No. of Active Employees	 165
Average Age	45.9
Average Past Service	10.2
 No. of Retired Employees	 0
Average Age	NA

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**B. Reconciliation of Funded Status at July 1, 2009 and Projected to June 30, 2010**

	Actual <u>6/30/2009</u>	Projected <u>6/30/2010</u>
1. Accumulated Postretirement Benefit Obligation (APBO)		
Actives Not Fully Eligible	(\$ 7,420,589)	(\$ 8,741,943)
Actives Fully Eligible	( 2,951,278)	( 3,128,355)
Retirees	( 0)	( 0)
Total APBO	(\$10,371,867)	(\$11,870,298)
2. Plan Assets	0	0
3. Funded Status	(\$10,371,867)	(\$11,870,298)
4. Unrecognized Net (Gain)/Loss	0	0
5. Unrecognized Prior Service Cost	0	0
6. Unrecognized Transition Obligation	<u>10,371,867</u>	<u>9,853,274</u>
7. (Accrued)/Prepaid Postretirement Benefit Cost	\$ 0	(\$ 2,017,024)

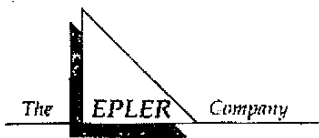
**C. Net Periodic Postretirement Benefit Cost for Fiscal Year Ending June 30, 2010**

1. Service Cost	\$ 876,119
2. Interest Cost	622,312
3. Expected Return on Assets	( 0)
4. Amortization of Net (Gain)/Loss	0
5. Amortization of Prior Service Cost	0
6. Amortization of Transition Obligation	<u>518,593</u>
7. Net Periodic Postretirement Benefit Cost	\$ 2,017,024

**D. Projected Benefit Payments for Fiscal Year Ending June 30, 2010**

1. Projected Benefit Payments	\$ 0
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E. Sample Disclosure for Fiscal Year Ending June 30, 2010\*

	Projected <u>6/30/2010</u>
1. Change in Benefit Obligation	
Benefit Obligation at Beginning of Year	\$10,371,867
Service Cost	876,119
Interest Cost	622,312
Change Due to Plan Amendments	0
Change Due to (Gain)/Loss	0
Benefits Paid	( 0 )
Benefit Obligation at End of Year	\$11,870,298
2. Change in Plan Assets	
Fair Value of Plan Assets at Beginning of Year	\$ 0
Expected/Actual Return of Plan Assets	0
Employer Contributions	0
Benefits Paid	( 0 )
Fair Value of Plan Assets at End of Year	\$ 0
3. Funded Status (2. minus 1.)	(\$11,870,298)
Unrecognized Net (Gain)/Loss	0
Unrecognized Prior Service Cost	0
Unrecognized Transition Obligation	<u>9,853,274</u>
Net Amount Recognized	(\$ 2,017,024)
4. Amount Recognized in Unrestricted Assets	
Net Actuarial (Gain)/Loss	\$ 0
Prior Service Cost	0
Unrecognized Net Transition Obligation	<u>9,853,274</u>
Net Amount Recognized	\$ 9,853,274
5. Weighted Average Assumptions for Disclosure	
Discount Rate	6.0%
Initial Healthcare Trend Rate	8.5% PPO
	8.0% HMO
Ultimate Healthcare Trend Rate	5.0%
Salary Scale	NA





	Projected 6/30/2010
6. Components of Net Periodic Benefit Cost	
Service Cost)	\$ 876,119
Interest Cost	622,312
Expected Return on Assets	( 0)
Amortization of Net (Gain)/Loss	0
Amortization of Prior Service Cost	0
Amortization of Transition Obligation	<u>518,593</u>
Net Periodic Postretirement Benefit Cost	\$2,017,024
7. Effect of a 1% Increase in Healthcare Trend	
Benefit Obligation	\$ 2,346,363
Total Service Cost and Interest Cost	\$ 381,419
8. Effect of a 1% Decrease in Healthcare Trend	
Benefit Obligation	(\$1,331,105)
Total Service Cost and Interest Cost	(\$ 211,840)
9. Estimated Future Benefit Payments	
2009/2010	\$ 0
2010/2011	\$ 39,871
2011/2012	\$ 104,593
2012/2013	\$ 163,264
2013/2014	\$ 234,084
2014/2015	\$ 312,367
2015/2016	\$ 390,393
2016/2017	\$ 457,650
2017/2018	\$ 522,735
2018/2019	\$ 601,183
2019/2020	\$ 707,905

\*Based on estimated amounts. Final disclosure will reflect actual amounts available at end of fiscal year.

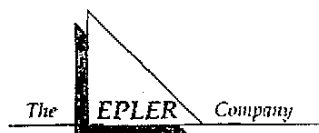


### Section III. Projected Cash Flows

The valuation process includes the projection of the expected benefits to be paid under the Plan. This expected cash flow takes into account the likelihood of each employee reaching age for eligibility to retire and receive health benefits. The projection is performed by applying the turnover assumption to each active employee for the period between the valuation date and early retirement date. Once the employees reach the earliest retirement date, a certain percent are assumed to enter the retiree group each year. All remaining employees are assumed to have retired by age 65 at the latest. Employees already over age 65 as of the valuation date are assumed to retire immediately. The per capita cost as of the valuation date is projected to increase at the applicable healthcare trend rates both before and after the employee's assumed retirement. The projected per capita costs are multiplied by the number of expected future retirees in a given future year to arrive at the cash flow for that year. Also, a certain number of retirees will leave the group each year due to expected deaths or reaching a limit age and this group will cease to be included in the cash flow from that point forward. Because this is a closed-group valuation, the number of retirees dying each year will eventually exceed the number of new retirees, and the size of the cash flow will begin to decrease and eventually go to zero.

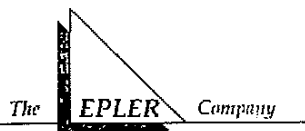
The expected employer cash flows for selected future years are provided in the following table:

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Projected Employer Cash Flows – Representative Years

<u>Fiscal Year</u>	<u>Future Retirees</u>	<u>Current Retirees</u>	<u>Total</u>
2009/10	\$ 0	\$ 0	\$ 0
2010/11	\$ 39,871	\$ 0	\$ 39,871
2011/12	\$ 104,593	\$ 0	\$ 104,593
2012/13	\$ 163,264	\$ 0	\$ 163,264
2013/14	\$ 234,084	\$ 0	\$ 234,084
2014/15	\$ 312,367	\$ 0	\$ 312,367
2015/16	\$ 390,393	\$ 0	\$ 390,393
2016/17	\$ 457,650	\$ 0	\$ 457,650
2017/18	\$ 522,735	\$ 0	\$ 522,735
2018/19	\$ 601,183	\$ 0	\$ 601,183
2019/20	\$ 707,905	\$ 0	\$ 707,905
2020/21	\$ 818,611	\$ 0	\$ 818,611
2021/22	\$ 924,630	\$ 0	\$ 924,630
2022/23	\$ 1,045,593	\$ 0	\$ 1,045,593
2023/24	\$ 1,166,869	\$ 0	\$ 1,166,869
2024/25	\$ 1,280,128	\$ 0	\$ 1,280,128
2025/26	\$ 1,408,399	\$ 0	\$ 1,408,399
2026/27	\$ 1,535,954	\$ 0	\$ 1,535,954
2027/28	\$ 1,672,424	\$ 0	\$ 1,672,424
2028/29	\$ 1,813,202	\$ 0	\$ 1,813,202
2029/30	\$ 1,955,075	\$ 0	\$ 1,955,075
2030/31	\$ 2,116,111	\$ 0	\$ 2,116,111
2031/32	\$ 2,284,203	\$ 0	\$ 2,284,203
2032/33	\$ 2,438,165	\$ 0	\$ 2,438,165
2033/34	\$ 2,580,575	\$ 0	\$ 2,580,575
2034/35	\$ 2,724,671	\$ 0	\$ 2,724,671
2035/36	\$ 2,866,512	\$ 0	\$ 2,866,512
2036/37	\$ 2,987,285	\$ 0	\$ 2,987,285
2037/38	\$ 3,088,445	\$ 0	\$ 3,088,445
2038/39	\$ 3,168,611	\$ 0	\$ 3,168,611
2039/40	\$ 3,230,416	\$ 0	\$ 3,230,416
2040/41	\$ 3,280,225	\$ 0	\$ 3,280,225
2045/46	\$ 3,339,020	\$ 0	\$ 3,339,020
2050/51	\$ 3,111,523	\$ 0	\$ 3,111,523
2055/56	\$ 2,636,552	\$ 0	\$ 2,636,552
2060/61	\$ 1,961,940	\$ 0	\$ 1,961,940
2065/66	\$ 1,258,192	\$ 0	\$ 1,258,192
All Years	\$121,246,167	\$ 0	\$121,246,167



#### Section IV. Funding Analysis

There are multiple ways to approach funding a retiree health plan. The net periodic benefit cost (expense) determined under FAS 106 is one method, of many, that could be used to pre-fund benefits. The annual expense amount will fluctuate from year to year based on the asset performance and as the population matures. The FAS 106 expense amortizes the initial accumulated postretirement benefit obligation (also referred to as the actuarial accrued liability) over 20 years on a straight-line basis (with a separate interest component) and defers any recognition of actuarial gains and losses until the amount exceeds a 10% corridor.

Our recommended funding approach is to amortize the initial unfunded actuarial accrued liability over 30 years including interest and to spread future actuarial gains and losses including interest over 5 years. A determination of the annual funding requirement of the current period is presented below:

1. Development of Unfunded Actuarial Accrued Liability	
Actuarial Accrued Liability at 7/1/2009	\$10,371,867
Actuarial Value of Plan Assets at 7/1/2009	(           0)
Unfunded Actuarial Accrued Liability (UAAL)	\$10,371,867
30 Year Amortization Base	\$ 710,853
2. Recommended Funding Contribution	
Normal Cost	\$ 826,527
Amortization of UAAL	<u>710,853</u>
Recommended Contribution Payable at Beginning of Fiscal Year	\$ 1,537,380
Interest to End of Fiscal Year	<u>92,243</u>
Recommended Contribution Payable at End of Fiscal Year	\$ 1,629,623

The development of the recommended contribution is consistent with funding methods used to pre-fund pension benefits. The normal cost component of the recommended funding contribution will tend to increase over time as the group matures. The amortization of the initial UAAL will stay constant and then drop to zero after 30 years; however, future experience gains and losses will result in decreases or increases as additional amortization bases are added.



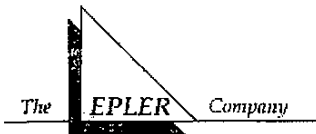
A more simplified approach to pre-fund the postretirement health benefits could be adopted by PCHS. Presented below are our best estimate to pre-fund the entire PCHS obligation (the present value of projected payments) for its current active employees and retirees using both level-dollar and level-percentage of pay methods over varying periods of time and assuming varying asset return rates on the liability. PCHS may want to use these as parameters for a minimum or maximum funding amount.

	Expected Long Term Asset Rate of Return			
	5.0%	6.0%	7.0%	8.0%
Present Value of Projected Benefits (PVPB)	\$25,896,678	\$20,092,578	\$15,839,697	\$12,674,283
Market Value of Assets	( 0 )	( 0 )	( 0 )	( 0 )
Unfunded PVPB	\$25,896,678	\$20,092,578	\$15,839,697	\$12,674,283
Level Dollar Funding				
20 Years	\$2,078,016	\$1,751,763	\$1,495,155	\$1,290,904
25 Years	\$1,837,433	\$1,571,776	\$1,359,213	\$1,187,311
30 Years	\$1,684,616	\$1,459,704	\$1,276,464	\$1,125,824
40 Years	\$1,509,211	\$1,335,384	\$1,188,122	\$1,062,867
Level Percentage of Pay*				
20 Years	16.8%	14.3%	12.3%	10.7%
25 Years	14.0%	12.1%	10.6%	9.4%
30 Years	12.1%	10.7%	9.6%	8.6%
40 Years	9.8%	9.0%	8.3%	7.6%

\* Based on benefit eligible employees and assumes an aggregate 3.25% increase in payroll.

We have listed below some financial advantages that may be achieved by pre-funding retiree health benefits. Of course, pre-funding will have to be weighed against alternative uses of the contribution amounts.

- The earlier contributions are made, the less PCHS contributions in aggregate will have to be made to fulfill its obligations.
- Pre-funding can mitigate any resulting adverse impact on credit rating that could result from disclosure of liabilities.
- Pre-funding may provide additional benefit security to current and future retirees.



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## Section V. Benefit Plan Provisions

This study analyzes the post-retirement health benefit program provided by PCHS.

PCHS provides health benefits to certain eligible employees at retirement. The retiree health benefits provided are a continuation of the medical including prescription drugs, dental and vision benefits provided to active employees. The retiree health coverage is paid for entirely by PCHS for the lifetime of the retiree. Survivors of deceased retirees may continue health coverage, at their own expense. Eligibility for retiree health benefits requires the following:

- \* Future retiree must be enrolled in health plan prior to retirement date
- \* Future retiree must be in receipt of monthly payment from STRS or PERS
- \* Active employees must meet the following years of service requirements at retirement
  - Hired before 3/12/84 must have 5 consecutive years of service just prior to retirement
  - Hired after 3/11/84 but before 7/1/87 - must have 10 consecutive years of service just prior to retirement
  - Hired after 6/30/87 but before 6/1/92 - must have 15 consecutive years of service just prior to retirement or 20 years of service with 10 years of consecutive years of service just prior to retirement
  - Hired after 5/31/92 age + consecutive years of qualifying service at retirement greater than or equal to 80
  - Hired after 2/28/07 age + consecutive years of qualifying service at retirement greater than or equal to 80 & at least 15 consecutive years of qualifying service at retirement
  - Hired after 6/30/09 age + consecutive years of qualifying service at retirement greater than or equal to 85 & at least 25 consecutive years of qualifying service at retirement
- \* Retiree must be enrolled in Medicare Part A if eligible; and must enroll in Part B

All employees except PESPU employees hired on or after July 1, 2009 are not eligible for PCHS-paid health benefits at retirement. Employees who defer their retirement after separation from service with PCHS are not eligible for PCHS-paid health benefits.

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### Premium Rates

Effective January 1, 2010, PCHS will provide future retiree health coverage through plans available through SISC. The following table summarizes the monthly premiums for the health benefit coverage provided by PCHS. All premiums are effective through September 30, 2010.

#### Medical Plans:

	Kaiser HMO	Anthem HMO	PPO Plan
Retiree Only	\$364.00	\$529.00	\$656.00
Retiree Plus Spouse	\$728.00	\$752.00	\$951.00
Retiree Plus Family	\$1,028.00	\$957.00	\$1,215.00
Retiree Only - Medicare	\$206.00	\$455.00	\$590.00
Retiree Plus Spouse - Medicare	\$412.00	\$904.00	\$1,180.00

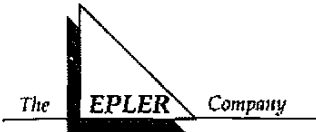
#### Dental Plans:

	Delta Premier Incentive Plan	Delta PPO Plan
Retiree Only	\$56.20	\$45.00
Retiree Plus Spouse	\$112.00	\$90.00
Retiree Plus Family	\$147.00	\$118.00

#### Vision Plans:

	VSP Vision Plan
Retiree Only	\$12.20
Retiree Plus Spouse	\$18.40
Retiree Plus Family	\$27.60

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## Section VI. Valuation Data

### Active and Retiree Census

The valuation was based on census information furnished to us by PCHS. The following tables display the age distribution for retirees and the age/service distribution for active employees as of the Measurement Date.

### Age Distribution of Eligible Retired Participants & Beneficiaries

All employees who have returned to LAUSD for retirement have been excluded from this valuation. Past retirees of PCHS are assumed to be the financial responsibility of LAUSD for the purpose of the report.

### Age/Service Distribution of Active Participants

Age	Service									Total
	0-4	5-9	10-14	15-19	20-24	25-29	30-34	35-39	40-44	
20-24	2									2
25-29	6	5								11
30-34	12	8	2							22
35-39	8	10	2	3	2					25
40-44	3	8	6	6	0					23
45-49	7	5	3	1	2		1			19
50-54	4	8	1	2	4	1	0			20
55-59	6	2	5	2	6	1	1			23
60-64	3	4	1	3	3	0	1			15
65-69	0	1	0	1	0	0	0	1		3
70+	<u>0</u>	<u>0</u>	<u>0</u>	<u>1</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>1</u>	<u>2</u>
Total:	51	51	20	19	17	2	3	1	1	165
Average Age: 45.9										
Average Service: 10.2										
Average Hire Age: 35.7										
Average Salary: \$9,458,000										





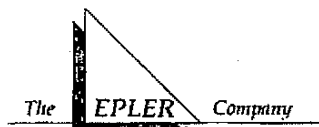
## Section VII. Actuarial Assumptions and Methods

The liabilities set forth in this report are based on the actuarial assumptions described in this section.

Fiscal Year:	July 1 <sup>st</sup> to June 30 <sup>th</sup>
Measurement Date:	July 1, 2009
Applicable Accounting Standards:	FASB 106 & 158
Discount Rate:	5.0% per annum for comparable purposes to prior valuation 6.0% to reflect rate of return of high quality long-term debt instrument, applicable for FAS 106 & 158 accounting purpose
Return on Assets:	Not applicable
Inflation:	3.0% per annum, in aggregate
Salary Increases:	3.25% per annum, in aggregate
Pre-retirement Turnover:	Termination rates are based on the most recent rates used by CalPERS and the California State Teachers Retirement System (STRS) for the pension valuation. Sample rates are in the following tables:

CalPERS Service	Entry Age			
	20	30	40	50
0	16.17%	14.25%	12.33%	10.41%
5	9.38%	7.46%	5.54%	1.34%
10	6.71%	4.79%	0.92%	0.31%
15	5.33%	3.41%	0.40%	0.03%
20	3.95%	0.47%	0.03%	0.02%
25	2.57%	0.12%	0.02%	0.02%
30	0.19%	0.02%	0.02%	0.02%

VIA



STRS					
Males:		Entry Age			
Service	25 - 29	30 - 34	35 - 39	40 - 45	45 & Up
0	15.3%	15.3%	15.3%	15.3%	15.3%
5	3.0%	3.0%	3.0%	3.0%	3.6%
10	2.0%	2.0%	2.0%	2.4%	
15	1.1%	1.1%	1.2%		
20	0.6%	0.6%			
25	0.5%				
30	0.0%				

STRS					
Females:		Entry Age			
Service	25 - 29	30 - 34	35 - 39	40 - 45	45 & Up
0	15.3%	15.3%	15.3%	15.3%	15.3%
5	5.8%	4.2%	2.9%	2.5%	2.5%
10	2.0%	1.7%	1.4%	1.6%	
15	0.9%	1.0%	0.9%		
20	0.7%	0.9%			
25	0.6%				
30	0.0%				

Prior valuation used the Crocker-Sarason T-5 turnover table less mortality.

**Mortality Rates:**

Mortality rates are based on the most recent rates used by CalPERS and STRS for the pension valuations. Sample rates are as follows:

CalPERS		Actives		Retirees	
Age		Males	Females	Males	Females
25		0.034%	0.021%		
30		0.048%	0.031%		
35		0.067%	0.044%		
40		0.094%	0.063%		
45		0.130%	0.088%		
50		0.179%	0.125%		
55		0.248%	0.178%	0.429%	0.253%
60		0.344%	0.256%	0.721%	0.442%
65		0.480%	0.369%	1.302%	0.795%
70				2.135%	1.276%

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STRS Age	Actives		Retirees	
	Males	Females	Males	Females
25	0.051%	0.029%		
30	0.066%	0.029%		
35	0.080%	0.037%		
40	0.085%	0.051%		
45	0.107%	0.077%		
50	0.158%	0.103%		
55	0.258%	0.157%		
60	0.443%	0.256%	0.558%	0.336%
65	0.798%	0.509%	1.015%	0.668%
70			1.803%	1.176%
75			2.848%	1.834%
80			5.210%	3.778%
85			9.419%	6.503%

Prior valuation used the 1983 Group Annuity Mortality, male and female tables set back four years to reflect recent mortality improvements.

**Retirement Rates:**

Age	Percent Retiring*	
	STRS Employees	PERS Employees
50 - 54	0.0%	2.0%
55	25.0%	25.0%
56	15.0%	15.0%
57	10.0%	10.0%
58	10.0%	10.0%
59	10.0%	10.0%
60	50.0%	50.0%
61	35.0%	35.0%
62	50.0%	50.0%
63	25.0%	25.0%
64	25.0%	25.0%
65	100.0%	100.0%

\* Of those having met eligibility to receive PCHS paid benefits. The percentage refers to the probability that an active employee who has reached the stated age will retire within the following year.

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**Retirement Eligibility Age:** The earliest retirement age assumed for employees who participate in STRS is age 55. The earliest retirement age assumed for employees who participate in PERS is age 50.

**Participation Rates:** 100% of future active employees are assumed to elect retiree health coverage at retirement – 50% are assumed to elect HMO coverage and 50% are assumed to elect PPO coverage. Of those electing coverage approximately 50% are assumed to elect coverage for their spouse. Female spouses are assumed to be three years younger than male spouses.

**Claim Cost Development:** The valuation was based on the premiums rates furnished by PCHS obtained for their future retirees.

**Medical Trend Rates:**

Year	HMO	PPO
2011	8.0%	8.5%
2012	7.5%	8.0%
2013	7.0%	7.5%
2014	6.5%	7.0%
2015	6.0%	6.5%
2016	5.5%	6.0%
2017	5.0%	5.5%
2018+	5.0%	5.0%

**Dental & Vision Trend Rates:**

Year	Trend
2011+	5.0%

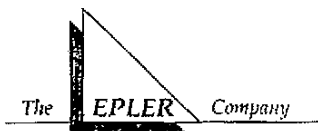


**Actuarial Cost Method:** The actuarial cost method used was Projected Unit Credit with service prorated. Under this method, the Actuarial Accrued Liability is the present value of projected benefits multiplied by the ratio of benefit service as of the valuation date to the projected benefit service at first full retirement eligibility age. The Normal Cost for a plan year is the expected increase in the Accrued Liability during the plan year.

All employees eligible as of the measurement date in accordance with the provisions of the Plan listed in the data provided by PCHS were included in the valuation.

**Actuarial Value of Assets:** As of the valuation date there are no eligible plan assets.

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### Section VIII. Actuarial Certification

The results set forth in this report are based on the actuarial valuation of the retiree health benefit plans of Palisades Charter High School (PCHS) as of July 1, 2009.

The valuation was performed in accordance with generally accepted actuarial principles and practices and in accordance with FASB statements No. 106 and 158. We relied on census data for active employees and retirees provided to us by PCHS. We also made use of plan information, premium information, and enrollment information provided to us by PCHS.

The assumptions used in performing the valuation, as summarized in this report, and the results based thereupon, represent our best estimate of anticipated experience and actuarial cost of the retiree health benefit plans.

I am a member of the American Academy of Actuaries and believe I meet the Qualification Standards of the American Academy of Actuaries to render the actuarial opinion contained herein.

Certified by:

Marilyn K. Jones, ASA, EA, MAAA, FCC  
Vice President and Actuary

Date: 11/5/10



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## **Palisades Charter High School DIRECTOR OF ACADEMIC PLANNING AND GUIDANCE SERVICES**

### **JOB SUMMARY:**

The Director of Academic Planning and Guidance Services is accountable to the School's Principal and is responsible for counseling and guiding all students toward a rigorous common core curriculum that will enable them to be successful in college (including California A-G requirements) or other post-secondary goals.

1. The Director of Academic Planning and Guidance Services is accountable for providing the depth and breadth of classes for students to optimize their education, career and interests.
2. The Director of Academic Planning and Guidance Services is accountable for providing students and their parents with the knowledge and guidance to make sound decisions regarding class selection, career planning, college advisement, and non-classroom based educational opportunities.
3. The Director of Academic Planning and Guidance Services is responsible for the building of the Master Schedule that encompasses the skills and abilities of the faculty while meeting the needs and interests of the students.
4. The Director of Academic Planning and Guidance Services is accountable for the performance and services rendered by the counseling staff.
5. The Director of Academic Planning and Guidance Services is accountable for the performance of the Math Department.
6. The Director of Academic Planning and Guidance Services will perform other duties as assigned.



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## **Palisades Charter High School HUMAN RESOURCES DIRECTOR**

### **JOB SUMMARY:**

The Human Resources Director is responsible for Human Resources for PCHS.

1. The Human Resources Director is accountable to the Executive Director and is responsible for design and administration of employee benefit programs including: medical, dental, vision, FLEX accounts and Wellness Days
2. The Human Resources Director is accountable for recruitment and on-boarding of management, certificated and classified staff.
3. The Human Resources Director is responsible for the Human Resources budget.
4. The Human Resources Director is responsible for participating in labor negotiations with UTLA and PESPU.
5. The Human Resources Director is accountable for pro-active management of employee issues.
6. The Human Resources Director is accountable for the performance review process.
7. The Human Resources Director is accountable for annual compliance training (child abuse, sexual harassment).
8. The Human Resources Director will perform other duties as assigned.





## DRAFT HIRING POLICY

### POSTING

- An open position is created either by a vacancy or by approval of the budget committee if it is an added position. Vacant positions do not automatically become open positions. The administrative team evaluates staffing levels as vacancies occur to evaluate current staffing needs.
- All open positions (certificated, classified and coaching) will be posted on the job opportunities section of the Pali High website for a minimum of one week and emailed to all employees.
- Where applicable, they will also be advertised on EdJoin or other sites specific to the position (lifeguardjobs.com; craigslist, etc).

### ELIGIBILITY OF CANDIDATES

- A candidate who was previously terminated from or dismissed from a position is not eligible to reapply

### RESUMES

- Resumes will be reviewed by the department chair and administrator over the position.
- In cases where there is a large volume of resumes, criteria will be given to the HR department by the department chair and/or administrator to screen.

### INTERVIEW COMMITTEES

- Include representatives from all stakeholder groups (teacher, classified, parent, student, administrator) as directed by the Charter
- Other members may also be included who have specific job knowledge (additional teachers from the department, etc)
- Members are selected by the department chair, administrator over the department and HR Director.
- Through the work with UCLA SMP additional selection criteria may be established

### INTERVIEWS – TBD through UCLA SMP work

### OFFERS OF EMPLOYMENT

- All offers are pending a live scan and TB clearance
- Perspective employees are rated in according to the salary schedule applicable to their position
- The Board of Trustees approves all Director and Manager level positions before an offer is made
- Contracts are signed by the Executive Director

**COACHES AND COORDINATORS**

- Non-elected coordinators are decided by the Principal with input from the Administrative team
- Coaches may include non-employees so the positions are posted on our website and candidates are interviewed by an interview committee as described above

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BOARD POLICY # \_\_\_\_\_

**DRAFT****PALISADES CHARTER HIGH SCHOOL****STUDENT FREEDOM OF SPEECH/EXPRESSION: PUBLICATION CODE POLICY**

The Board of Trustees respects students' rights to express ideas and opinions, take stands, and support causes, whether controversial or not, through their speech, their writing, their clothing, and the printed materials they choose to post or distribute.

Student freedom of expression shall be limited only as allowed by law in order to maintain an orderly school environment and to protect the rights, health, and safety of all members of the school community. Expression shall be prohibited which is obscene, libelous, or slanderous. Also prohibited shall be material 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.

**Distribution of Circulars, Newspapers, and Other Printed Matter**

Students shall be allowed to distribute circulars, leaflets, newspapers, and pictorial or other printed matter, and to circulate petitions, subject to the following specific limitations:

1. Leaflets, pictorial and other printed matter to be distributed, *with the exception of any on-campus publications that are declared as public forums for student expression, including but not restricted to the Tideline newspaper, the Making Waves literary magazine, and the Educere academic journal*, shall be submitted to the principal or designee at least one school day prior to distribution.
2. Distribution, free or for a fee, may take place at any time except during instructional time and providing there is no substantial disruption in the school programs (as determined by the principal). *The Tideline newspaper, however, may be distributed during instructional time providing there is no substantial disruption to school programs.*
3. The manner of distribution shall be such that coercion is not used to induce students to accept the printed matter or to sign petitions.
4. The solicitation of signatures must not take place in instructional classes or school offices, nor be substantially disruptive to the school program (as determined by the principal).
5. Pupil editors of official school publications shall be responsible for assigning and editing the news, editorial, and feature content of their publications. However, it shall be the

## VI. C.

responsibility of a journalism adviser or advisers of pupil publications within each school to supervise the production of the pupil staff, to maintain professional standards of English and journalism, and to maintain the provisions of *the California Education Code 48907. (see attached)*

- 5.6. There shall be no prior restraint *or prior review* of material prepared for *established public forums for student expression* except insofar as it violates this policy. School officials shall have the burden of showing justification without undue delay prior to a limitation of pupil expression under *the California Education Code 48907. (see attached)*

6.7.

### **Buttons, Badges, and Other Insignia of Symbolic Expression**

Students shall be permitted to wear buttons, badges, armbands, and other insignia as a form of expression, subject to the prohibitions enumerated in this Policy.

### **Use of Bulletin Boards**

Students will be provided with bulletin boards, upon request, for use in posting student materials on campus locations convenient to student use. Where feasible, the location and quantity of such bulletin boards shall be by mutual agreement of student government representatives and the local school administration. Posted material must be in compliance with other sections of this Policy, particularly regarding the distribution of materials and prohibited speech.

### **Organized Demonstrations**

Students have the right to lawful organized on-campus demonstrations, subject to the provisions of this Policy and applicable law.

No organized demonstrations by school groups may take place during school hours off the school campus unless sanctioned by school authorities and supervised by a designated school authority. No individual student may demonstrate in the name of the school or as an official school group at any time unless authorized by the school to participate in the activity.

### **Enforcement**

1. The principal or designee shall review material submitted in a reasonable amount of time and shall allow the approved material to be distributed according to the time and manner established by this Policy. *On-campus publications that are declared as "public forums for student expression" shall be exempt from this prior review. (See attached Freedom of Speech FAQ)*
2. Any student may appeal the decision of the principal or designee to the Board who shall render a decision within a reasonable period of time after receipt of the appeal. The

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appeal by the student must be made within five school days from the time the unsatisfactory decision was rendered.

3. Students who are considering actions in the areas covered by this Policy should be informed of the possible consequences of their action under each specific circumstance.
4. *Pursuant to California Senate Bill 1370 an employee shall not be "dismissed, suspended, disciplined, reassigned, transferred, or otherwise retaliated against" for solely acting to protect a pupil's speech, or for refusing an administrator's order to illegally censor speech.*

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*It is recommended that the following documents be attached to the policy for clarification of restrictions and lack thereof:*

**California Education Code Section 48907 - Student exercise of free expression.**

(a) Pupils of the public schools shall 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, except that expression shall be prohibited which is obscene, libelous, or slanderous. Also prohibited shall be material 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.

(b) Each governing board of a school district and each county board of education shall adopt rules and regulations in the form of a written publications code, which shall include reasonable provisions for the time, place, and manner of conducting such activities within its respective jurisdiction.

(c) Pupil editors of official school publications shall be responsible for assigning and editing the news, editorial, and feature content of their publications subject to the limitations of this section. However, it shall be the responsibility of a journalism adviser or advisers of pupil publications within each school to supervise the production of the pupil staff, to maintain professional standards of English and journalism, and to maintain the provisions of this section.

(d) There shall be no prior restraint of material prepared for official school publications except insofar as it violates this section. School officials shall have the burden of showing justification without undue delay prior to a limitation of pupil expression under this section.

(e) "Official school publications" refers to material produced by pupils in the journalism, newspaper, yearbook, or writing classes and distributed to the student body either free or for a fee.

(f) This section does not prohibit or prevent the governing board of a school district from adopting otherwise valid rules and regulations relating to oral communication by pupils upon the premises of each school.

(g) An employee shall not be dismissed, suspended, disciplined, reassigned, transferred, or otherwise retaliated against solely for acting to protect a pupil engaged in the conduct authorized under this section, or refusing to infringe upon conduct that is protected by this section, the First Amendment to the United States Constitution, or Section 2 of Article I of the California Constitution.

**Q: Can we publish students' names and photos online?**

A: Despite what many schools seem to think, no federal privacy law requires a student publication to withhold student information from the Internet or get advance written parental consent (though two states, New Jersey and Maine, appear to do so). If you're told there is such a ban, ask to see the school district policy in writing – and if the policy applies only to sites hosted on a school server (many do), see if you can get your news site hosted on a third-party server like [my.hsi.org](http://my.hsi.org).

**Q: Can I use Freedom of Information laws?**

A: Yes. Freedom of Information, or "sunshine" laws, require government agencies such as public schools to open many of their official records and meetings to the public. These laws vary from state to state. Every newsroom should have a copy of the state's open records and open meetings laws -- a great state-by-state guide is available on the [Reporters' Committee for Freedom of the Press website](http://Reporters' Committee for Freedom of the Press website)

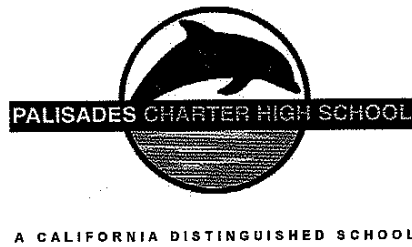
**Q: Can I use cartoon characters, song lyrics or a theme from a popular magazine in my publication?**

A: In most cases, only when you have obtained the permission of the copyright holder. Each of these works is protected by copyright law, which means others can use them only if they have obtained permission. Publishing a credit line does not take the place of permission. There is an exception to copyright law called "fair use" that can apply if you are only using a small amount of a copyrighted work in a way that does not substitute for viewing (or buying) the original.

**Q: Am I allowed to re-use photos from Facebook, or Myspace, or videos from YouTube?**

A: It all depends on what you're using them for. It's safest if you are critiquing the material – such as a "funniest videos" highlight segment on a broadcast, where you're adding your own commentary, or if you're making a parody or a mash-up that just "samples" other people's material as an ingredient in a brand-new creative work. The danger goes up with the commercial value of what you're using, so an AP photo published in a celebrity magazine is much riskier than an amateur Facebook photo.





**POLICY COMMITTEE MEMBERS**  
**2010-2011**

**TEACHERS**

Linda Burgess  
Sarah Crompton – Secretary  
Valerie Ransom  
Julie Benke  
Dave Schalek  
Michael Friedman

**CLASSIFIED STAFF**

Julia O'Grady – Chair  
Helene Kunkel (alternate)

**ADMINISTRATOR**

Ann Davenport

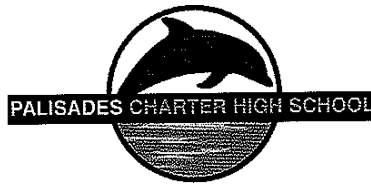
**PARENTS**

Gwen Tanguay-Bauer  
Polly Bamberger  
Sue Pascoe (alternate 1)  
Chip Bailey (alternate 2)

**STUDENT**

Eeman Khorramian  
Eunice Lee (alternate)





A California Distinguished School

## **POLICY COMMITTEE BYLAWS**

**SUBMITTED TO BOARD OF TRUSTEES FOR APPROVAL ON NOVEMBER 16, 2010**

### **SECTION 1 – PURPOSE**

The purpose of the Palisades Charter High School Policy Committee is to review, develop and recommend policies to promote student achievement and facilitate the functioning of the school.

### **SECTION 2 – FUNCTION**

- Research and gather information regarding feasibility and implications of implementing new or revised policies
- Make recommendations to the Palisades Charter High School Board of Trustees

### **SECTION 3 – CONSTRUCTION**

These bylaws shall be liberally construed to the end that the Palisades Charter High School Policy Committee fulfills its stated function.

### **SECTION 4 – COMPOSITION AND SIZE**

The Policy Committee shall be open to all stakeholders of PCHS, will consist of a majority membership of the faculty stakeholder group, with the following composition:

- six (6) teachers
- two (2) parents/community members
- one (1) student
- one (1) administrator
- one (1) classified employee
- one ex-officio Board of Trustees member

Members should be selected during June of each school year. Applications for positions will be accepted by the acting secretary in May. If more than the number of required members applies, an election should be scheduled for the June committee meeting and those attending that meeting should vote to seat the committee. Those persons receiving the most votes for each stakeholder position shall be seated as a committee member and the runners-up shall be seated as alternates.

Members will serve one-year term, with no term limits. Terms shall commence in June and continue through the next school year. Vacancies shall be filled by alternates or by accepting new applications if necessary during the term.

The names of the committee members and officers will be submitted to the Board of Trustees for approval and the committee members' names should be published (on the school website and on the designated bulletin board) in June.

#### **SECTION 5 – CHAIRPERSON**

The Committee Chairperson/facilitator should be elected by the standing committee members. The responsibilities of the Chairperson are as follows:

- Call meetings
- Prepare or direct the Secretary to prepare committee agendas;
- Provide time and opportunity for all viewpoints to be heard
- Oversee meetings to ensure that the function of the committee is met;
- Present committee reports to the Board of Trustees;

#### **SECTION 6 – SECRETARY**

The Secretary of the Policy committee shall perform the following tasks:

- Preserve the committee's records
- At the direction of Chairperson, prepare and distribute notices of committee meetings;
- Prepare committee reports and publish Minutes; and
- In the absence of the Chairperson, act as Chairperson.

#### **SECTION 7 – MEETINGS**

Regular meetings of the committee shall be held the second Wednesday of every month at the published time and location. An agenda serving as a notice of a meeting shall be made public no less than 72 hours prior to a regular meeting. Any stakeholder may request an item be included on the agenda, provided such item is within the function of the committee. Special and emergency meetings may be called on shorter notice, only in accordance with the Brown Act.

#### **SECTION 8 – QUORUM**

A majority of the voting membership, with representation by no less than three stakeholder groups, constitutes a quorum. The Committee may not take action without a quorum.

#### **SECTION 9 – TELEPHONE MEETINGS**

A meeting may be held by means of a conference telephone or similar communication only if in accordance with the Brown Act.

#### **SECTION 10 – RECOMMENDATIONS**

All decisions and recommendations from the Committee shall be presented to the Executive Director/Chief Learning Officer for review and implementation. If decisions incur substantial liability or are major changes in policy they will be presented to the Board for final decisions. The Board may request to review any decision made by the committee.

If possible, recommendations to the Board of Trustees should be made by consensus. If consensus cannot be met, a vote at the same meeting will be taken. A motion will pass if it receives a majority of the Standing Committee members' votes (or their alternate, substituting for a stakeholder group) who are in attendance at the meeting. In the case of a tie, a motion is defeated but may be discussed and presented again at a future meeting.

Recommendations/motions passed by the Committee for the Board of Trustees should include the names of the members present at the meeting during which the decision was made and the count of the vote for the decision.

#### **SECTION 11 – AMENDMENTS**

Amendments to these bylaws may be made by the Committee by timely written request to the Secretary of the Committee in advance of notice of a meeting, provided that notice of any proposed amendment or amendments; including text and statement of reasons therefore, is included in the notice of the committee meeting. All amendments must be consistent with the charter. Any amendments to bylaws must be submitted to the Board of Trustees for approval.

#### **SECTION 12 – CONFLICTS OF INTEREST**

Members of the Committee shall comply with Conflicts Code of the Charter school.

#### **SECTION 13 – SUBCOMMITTEES**

The committee is authorized to form *ad hoc* subcommittees to bring recommendations before the full committee.

#### **SECTION 14 – ATTENDANCE**

A member is required to abstain from voting if they missed the previous two meetings or the discussion related to the topic subject to vote. The members of the committee may revoke a person's membership if that individual misses three consecutive meetings.

#### **SECTION 15 – EFFECTIVE DATES**

These bylaws and any amendments shall become effective upon adoption by the Committee and approval by the Board of Trustees unless another effective date is expressly determined by the Committee.

#### **SECTION 16 – PARTICIPATION**

The Policy Committee encourages broad participation throughout the school community and all are welcome to attend and participate in Committee discussions. Only members may vote. Alternates from each stakeholder group may vote in the absence of that stakeholder group's voting member.

**Subject: Necessity of Public Hearing for Receipt of Tier III State Categorical Funding**

When the 2009 – 10 State Budget was enacted funding was cut for a number of categorical programs, as well as the Categorical Block Grant. In exchange, the State allowed districts and charter schools the flexibility to use some of these previously restricted funds for unrestricted general programming through the 2012 – 13 school year. These programs were arrayed into three “tiers” with each tier receiving a different treatment for funding reductions and spending flexibility.

Special education is in Tier I, with no cuts and no flexibility transfers. A number of categorical programs not available to charter schools are included in Tier II, with cuts but not flexibility. Tier III programs are subject to budget cuts and there is flexibility in their use. Beginning in 2009 – 10, the use of these funds is completely unrestricted and at the direction of the Governing Board.

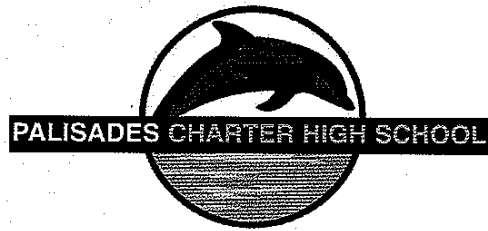
In addition, part of the 2009 – 10 State Budget enacted, ABX4 2, references that a public hearing is required “as a condition of receipt of funds for Tier III categorical programs.” The consequence of not conducting the public hearing is the loss of all Tier III funds, regardless of how they are expended. The key elements of the public hearing are:

- At a regular scheduled open meeting, the Governing Board convenes a hearing
- The Governing Board takes testimony from the public
- The hearing is closed and the Governing Board discusses the proposed use of the funding
- The Governing Board approves or disapproves the proposed use of funding from the 39 programs identified in Section 42605 of the Education Code

Below are listed the programs for which the school receives funding in this group, along with the estimated amount for 2010 – 11 and the proposed use of the funds:

Program	Resource	Est. 2010 – 2011 amount	Proposed Use of Funds
Art / Music Block Grant	6760	\$36,633.00	Continued expenditure for Art and Music Programs (Included in IMA)
CAHSEE Intervention	7055	\$21,955.00	Continues expenditure for CAHSEE intervention
Counselors, GR. 7 – 12	7080	\$148,899.00	Maintain support for counselors
Targeted Instructional Improvement Block Grant	7394	\$326,601.00	Continued support of teachers in Magnet Program (Grades 10-12)

It is our recommendation that the Governing Board approve the continued use of these funds in accordance with their original purposes.



**A CALIFORNIA DISTINGUISHED SCHOOL**

**Palisades Charter High School**

# **EMPLOYEE HANDBOOK**

**DRAFT  
2010 - 2011**





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**PALISADES CHARTER HIGH SCHOOL  
EMPLOYEE HANDBOOK ACKNOWLEDGEMENT AND AGREEMENT**

ALL EMPLOYEES MUST READ THIS EMPLOYEE HANDBOOK, COMPLETE THIS PAGE, MAKE A COPY OF IT AND RETURN THIS PORTION TO THE EXECUTIVE DIRECTOR'S OFFICE WITHIN ONE (1) WEEK OF RECEIPT.

By signing below, I certify that I have received a copy of the Palisades Charter High School ("PCHS") Employee Handbook ("Employee Handbook"), and I have carefully read and understand its contents.

I understand PCHS reserves the right to depart from and modify the policies stated in the Employee Handbook consistent with any applicable collective bargaining agreement provisions and other legal requirements.

Employee Name:		
(Please print)	Last Name	First Name
Address:		
Telephone:		
Signature:		Date:

## **I. WELCOME AND INTRODUCTION**

Welcome to Palisades Charter High School (PCHS). You are part of an organization committed to the primary goal of ensuring that all pupils learn at high levels by focusing the PCHS's core activities on pupil learning and achievement and the development of positive values and goals.

This Handbook will give you a brief introduction to PCHS and the rules under which it operates. As an employee, you'll want to know what is expected of you and what is available to you as a member of the PCHS family.

This Handbook is designed to meet the needs of both new and continuing employees. The Handbook sets forth policies and procedures of PCHS which concern your employment. It is our practice to follow these procedures and it is our goal to provide an enjoyable and comfortable workplace.

We hope you find your association with our PCHS rewarding. As an organization, we have much to offer our employees and those we serve.

### **RIGHT TO REVISE**

As noted, PCHS reserves the right to revise, modify, delete, or add to any and all policies, procedures, work rules, or benefits stated in this Handbook or in any other document consistent with any applicable collective bargaining agreement provisions and other legal requirements.

Any written changes to this Handbook will be distributed to all employees so that employees will be aware of the new policies or procedures. No oral statements or representations can in any way alter the provisions of this Handbook.

If the terms of this Handbook or any PCHS policies are inconsistent with any term of a represented employee's collective bargaining agreement, the terms of the employee's collective bargaining agreement shall be controlling.

## **II. GOVERNANCE AND SCHOOL BACKGROUND**

### **GOVERNING BOARD OF TRUSTEES**

PCHS is governed by an elected Board of Trustees who are responsible for the ensuring the covenants outlined within the Bylaws and Charter are followed. The Board currently consists of eleven voting members, including 3 Community Representatives, 3 Teacher representatives, 3 Parent Representatives, 1 Classified Representative and 1 Administrative/Manager. Non-voting members are 1 Student Representative, the Principal, the Executive Director and the Chief Business Officer.

To give you an idea of the overall structure, please refer to the Organizational Chart, found at Appendix A.

### **OVERVIEW**

High atop a hill, surrounded by the Santa Monica Mountains, and overlooking the majestic Pacific Ocean sits PCHS, a financially independent, comprehensive four-year high school. Its scenic views are matched only by the school's long history of high academic standards and educational excellence. Recognized as a California Distinguished School in 2005, PCHS was recently acknowledged by Newsweek Magazine in 2006 as among the top 1% of American high schools. PCHS also received a full six-year renewal of its accreditation by the Western Association of Schools and Colleges (WASC) in 2006. In 1993, PCHS' administrators, teachers, and parents worked together to attain the school's initial Charter. With its conversion to fiscally independent charter status in 2003, PCHS acquired even more flexibility and autonomy in furthering its efforts to support student success, create innovative instructional programs, and harness the creative energies of the staff, parents, and community.

As a financially independent charter school, PCHS receives its funding directly from the State of California and other sources and is freed from many of the local and state constraints placed on public schools. Stakeholders assume critical responsibilities for directing the school in its quest for high levels of student achievement. PCHS is proud of its diverse student body. Students representing more than 100 zip codes travel from all over the city to attend our school. And once there, they find an array of classes, programs, and activities designed to meet their interests and needs. PCHS is committed to developing students' talents in all areas: Academics, Athletics, and the Arts.

PCHS offers over 40 AP and Honors classes, teams in 14 different boy's and girl's sports, over 100 Student Clubs, a comprehensive Community Service program, and a dedicated College Advising Center. We're proud of our nationally recognized Theatre program, which has regularly taken 1st place in the Drama Teachers' Association Shakespeare Festival and has produced winners of the Music Center's Spotlight Awards and numerous other accolades. Our Academic Decathlon team consistently ranks among the top ten in the State. And our athletic teams have won numerous Western Division and CIF City Section Championships in a variety of sports, including

three Championships in tennis and swimming in 2005-06. Our student body in excess of 2,700 students, successfully study, play, and achieve in a community striving for excellence.

The PCHS Faculty and Administrators are caring professionals, dedicated to helping students reach their individual academic and personal goals. PCHS has an experienced, talented staff of alumni, nationally board certified teachers, and experts in their fields, boasting an average experience of more than ten years at our school. Supporting our students is a management team comprised of six (6) certificated directors and four (4) non-certificated managers. Our certificated staff include over 115 teachers, one Librarian, one full-time Health Nurse, and eight (8) Guidance Counselors. We have an active College Center staffed by four (4) professionals. The average student to teacher ratio is currently just over 24:1. PCHS maintains an average class size in its core subjects of 33-34 students with 25-26 in English. Our classes are organized into a five period block schedule each day, including Periods 0 and 7 lasting 55 minutes and Periods 1,3,5 or 2,4,6, lasting 1 hour 40 minutes and alternating daily. The block schedule allows teachers to cover more material and in greater depth during each class period and more closely resembles a college schedule. Students have expanded access to electives and athletics with the addition of Periods 0 and 7.

Passing through the halls of PCHS is a wonderfully diverse student body, reflecting the unique mosaic of our city. Why do we value diversity? It allows our students the opportunity to study and play in an environment that reflects their world, it encourages classroom discussions that encompass a broad range of perspectives, and it teaches respect for differences and appreciation for commonalities. Diversity makes PCHS a special community in which to learn.

## **VISION STATEMENT**

The vision of PCHS is to develop a professional learning community that values the growth of each pupil and the input of all stakeholders as active participants in a collaborative culture of continuous improvement. A professional learning community, as defined by Richard DuFour and Robert Eaker, is one in which there is a collective commitment to a school's core values and guiding principles, a willingness to work in collaborative teams sharing common purposes, an ongoing reflection on the results of collective inquiry regarding the school's methods and results, an orientation towards action and innovation, and most importantly, a belief in the possibility of continuous improvement. Continuous improvement implies perpetual dissatisfaction with the status quo and obliges all stakeholders to constantly consider the School's fundamental purpose, its goals for achievement, its strategies for improvement, and its criteria to measure success.

The path to improved student outcomes requires the commitment by all of those who have a stake in the success of the School's pupils, including a commitment to improve the quality of the learning, teaching, and working environments. It is the professional adult learning communities in the School which use scholarly research, data analysis,

and best educational practices to help pupils reach their maximum potential and achieve agreed upon common objectives correlated to content standards. PCHS intends to empower those professional adult learning communities and engage them in the development of educational programs and participation in school governance.

The PCHS vision of a professional learning community also includes the positive contributions of parents and community members. In the belief that all stakeholders working together can accomplish far more than any individual, PCHS aspires to focus its efforts and resources in support of all members of its learning community. The vision of the stakeholders of PCHS is for an environment of continuous improvement through which the School will realize its ultimate objective: to open doors to more post-secondary options for more pupils.

## **ORGANIZATIONAL GOALS**

A fundamental goal of PCHS is to develop and sustain demanding programs that challenge pupils to achieve at high levels while providing the flexibility to accommodate the variety of learning modalities. PCHS graduates should demonstrate mastery of rigorous standards and be prepared for post-secondary education and/or other post-secondary opportunities. Among the School's long-term goals:

- Graduates of PCHS will have mastered a rigorous common core curriculum that will enable them to be successful in college (including California A-G requirements) or other post-secondary options;
- Through expansion of Advancement Via Individual Determination (AVID), Mathematics, Engineering, and Science Achievement (MESA), and other outreach programs, an increased number of pupils, particularly socio-economically disadvantaged and under-represented pupils, will complete academically rigorous courses including Honors and Advanced Placement, and will attend four-year colleges and universities;
- PCHS will develop a program enabling pupils to identify postsecondary plans before completion of grade 10, which will be verified and updated annually;
- PCHS will utilize a variety of strategies and resources, including but not limited to block scheduling, virtual- or on-line learning, other educational settings (e.g. community college), and accelerated graduation to reduce daily teacher/student ratios and class sizes; and
- Pupils will engage in University of California (UC) Academic Preparation, UCLA's Academic Preparation and Educational Partnerships, and California State University's (CSU) Early Assessment Programs in order to increase student access to postsecondary level options.



## **CHARTER AFFIRMATIONS**

PCHS shall comply with all applicable portions of State and Federal laws and is committed to the following affirmations:

- PCHS shall participate in all required statewide assessment tests.
- PCHS shall meet all statewide standards applicable to non-charter public schools.
- PCHS shall be non-sectarian in its programs, admission policies, employment practices, and all other operations.
- PCHS will not charge tuition.
- PCHS will not discriminate against any pupil or employee on the basis of ethnicity, national origin, gender, sexual orientation, or disability.
- PCHS will admit all pupils who wish to attend the charter school, subject only to capacity.
- The meetings of the PCHS Board of Directors shall be held in accordance with the Ralph M. Brown Act.
- PCHS shall comply with the Individuals With Disabilities in Education Act ("IDEA"), Section 504 of the Rehabilitation Act (Section 504), and the Americans with Disabilities Act ("ADA").
- PCHS shall comply with the Public Records Act and the Family Educational Rights and Privacy Act (FERPA).
- The School's admission policies shall be carried out in compliance with all legal requirements and charter requirements, including a preference for admission of pupils who reside within the former attendance area of PCHS.
- No child shall be required to attend PCHS, nor shall any employee be required to work at PCHS.
- PCHS shall continually strive for a healthy, collaborative, synergistic relationship with the Los Angeles Unified School District (LAUSD) and with surrounding districts.
- PCHS shall offer, at a minimum, the same number of minutes of instruction set forth in paragraph (3) of subdivision (a) of Education Code Section 46201 for the appropriate grade levels.

- PCHS shall comply with all laws related to generating charter school apportionments for pupils over 19 years of age and pupils cannot be over the age of 22.
- PCHS shall, on a regular basis, consult with parents and teachers regarding the School's educational programs.

## **TYPE OF EMPLOYMENT AT PCHS/EMPLOYMENT CLASSIFICATIONS**

### **Certificated Employees:**

Employees working for PCHS while possessing a temporary, provisional or emergency certificate or permit will not earn credit during such time served toward probationary or permanent status with PCHS. At the time of publication of this Handbook, the PCHS-UTLA agreement incorporates many of the applicable provisions of the LAUSD-UTLA agreement. However, over time, a complete and separate agreement will be negotiated between PCHS and UTLA. Such temporary/day-to-day substitute employees serve in an at-will employment capacity for PCHS. As such, such employees may be released by PCHS without advance notice and without cause.

Probationary and permanent certificated employees are employed consistent with the terms of the PCHS-UTLA collective bargaining agreement. In that capacity, probationary employees may be released or non-re-elected only consistent with legal requirements.

### **Classified Employees:**

Classified employees may serve in a substitute, probationary or permanent capacity. As substitutes, employees serve on an at-will basis for the School. Such positions may be terminated without advance notice and without cause. If a classified employee is not a substitute, the position is either probationary or permanent and such employees serve under an employment contract which is consistent with any applicable collective bargaining agreements and legal requirements. During the probationary period, classified employees may be rejected from probation without advance notice and without cause.

Most classified employees are members of either Palisades Employee Support Professionals United (PESPU) (clerical and office staff) or Service Employees International Union (SEIU) (cafeteria, teacher aides, etc.). PCHS has a formalized agreement with PESPU. Our relationship with SEIU is more informal, with dues collected, and an on-site representative. The working relationship between SEIU members and PCHS is based on the LAUSD / SEIU contract in place at the time of this handbook's release. Probationary and permanent classified employees are employed consistent with the terms of the PCHS-PESPU collective bargaining agreement. In that capacity, probationary employees may be released or non-re-elected only consistent with legal requirements.

## **UNREPRESENTED**

There is a small group of classified employees who, due to job title and duties are not represented by any collective bargaining unit. These employees work on a contract basis, as approved annually by the Board of Directors. These at-will employees have their rights and benefits outlined in their individual contracts.

## **STIPEND / AUXILIARY POSITIONS**

There are certain positions that are granted on an annual basis and are to be re-applied for every year. These include but are not limited to Athletic Coaches, Tutors, School-wide Program Leaders/Coordinators, Department Chairs, Program Coordinators. These positions are at-will, even if the employee holding the position is protected by a collective bargaining agreement. An employee is eligible for only one leadership stipend per year. If an employee serves in two capacities, the highest paid leadership stipend applies. In addition, employees who are elected members of a PCHS Committee of the Board of Directors will be compensated \$50 per meeting attended for a maximum of one committee meeting per month.

## **CALENDAR**

PCHS operates on a traditional schedule (September through June). For a complete overview of the school year, refer to the Adopted PCHS Calendar found at Appendix B.

## **WORK WEEK**

The PCHS campus is open daily, Monday through Friday, except on scheduled holidays as noted in the Handbook. Normally, PCHS offices are open from 7:00 a.m. to 4:30 p.m. However, due to the nature of the work, some offices are open at 8:00 a.m. and continue beyond 4:30 p.m. Your supervisor will keep you informed of the rules and regulations regarding the hours of the department in which you work.

## **WORK AT HOME POLICY**

As PCHS is a student and stakeholder-centered organization, it is important that all employees be available during regular work hours. Therefore, some positions will not be able to work at home (all certificated and most classified staff). Permission to work at home is granted by direct supervisors for a specific amount of time, and for a specific purpose. Permission to work at home will be granted based on the demonstrated need and the condition that it will have a minimal negative impact on school operations. This policy does not include or apply to work taken home beyond the regular workday such as grading, planning, checking email, or other professional development activities pursued at home which typically extend beyond the regular workday.



### **III. WORKPLACE POLICIES AND PROCEDURES**

#### **EQUAL EMPLOYMENT OPPORTUNITY**

PCHS is firmly committed to the principle of equal employment opportunity. PCHS offers employment opportunities to all applicants and employees without regard to race, color, sex, age, religion, national origin, disability, or any other status protected by local or federal law. All aspects of the employment relationship (including recruiting, hiring, training, working conditions, compensation, promotion, discipline, and termination) are subject to this policy.

If you believe you have been subjected to any form of unlawful discrimination, you may submit a written complaint to your supervisor or to the Human Resources Director. Your complaint should be specific and should include the names of the individuals involved and the names of any witnesses. If you need assistance with your complaint, or if you prefer to make a complaint in person, contact Human Resources. PCHS will undertake a thorough and objective investigation, and attempt to resolve the situation.

If PCHS determines that unlawful discrimination has occurred, effective remedial action will be taken commensurate with the severity of the offense. Appropriate action also will be taken to deter any future discrimination. Retaliation against employees for the good faith filing of a complaint or participating in the investigation of a complaint is prohibited.

#### **UNIFORMED SERVICES POLICY**

PCHS is committed to complying with the Uniformed Services Employment and Reemployment Rights Act (USERRA). At PCHS, a person who is a member of, applies to be a member of, performs, has performed, applies to perform, or has an obligation to perform service in a uniformed service shall not be denied initial employment, reemployment, retention in employment, promotion, or any benefit of employment on the basis of that membership, application for membership, performance of service, application for service, or obligation.

#### **HARASSMENT PREVENTION POLICY**

PCHS is committed to providing a work environment free of harassment. PCHS policy prohibits sexual harassment as well as harassment based on race, religious creed, color, national origin, ancestry, physical or mental disability, medical condition, marital status, registered domestic partner status, age, sexual orientation, or any other basis protected by federal, state or local law or ordinance or regulation. *All such harassment is unlawful.* PCHS's anti-harassment policy applies to all persons involved in the operation of PCHS and prohibits unlawful harassment by any employee of PCHS, including supervisors and managers, as well as vendors, customers and any other persons.

Harassment includes verbal, physical, and visual conduct that creates an intimidating, offensive or hostile working environment or interferes with work performance. Such conduct constitutes harassment when (1) submission to the conduct is made either an explicit or implicit condition of employment; (2) submission to or rejection of the conduct is used as the basis for an employment decision; or (3) the harassment interferes with an employee's work performance or creates an intimidating, hostile or offensive work environment. Harassing conduct can take many forms and includes, but is not limited to, slurs, jokes, statements, gestures, pictures, or cartoons regarding an employee's race, religious creed, color, national origin, ancestry, physical or mental disability, medical condition, marital status, registered domestic partner status, age, sexual orientation, or any other basis protected by law.

Sexually harassing conduct in particular includes all of these prohibited actions as well as other unwelcome conduct such as requests for sexual favors, unwelcome sexual advances, or verbal or physical conduct of a sexual nature (like name calling, suggestive comments, or lewd talk).

Prohibited unlawful harassment includes, but is not limited to, the following behavior:

- Verbal conduct such as epithets, derogatory jokes or comments, slurs or unwanted sexual advances, invitations, or comments;
- Visual displays such as derogatory and/or sexually-oriented posters, photography, cartoons, drawings or gestures;
- Physical conduct including assault, unwanted touching, intentionally blocking normal movement or interfering with work because of sex, race or any other protected basis;
- Threats and demands to submit to sexual requests as a condition of continued employment or to avoid some other loss, and offers of employment benefits in return for sexual favors; and
- Retaliation for reporting or threatening to report harassment, or cooperating in an investigation or alleged harassment.

PCHS has a zero tolerance policy toward harassment. Any employee who believes that he or she has been subjected to harassment is encouraged to immediately report the harassment to any supervisor, any Director of PCHS, or to the Human Resources Department. PCHS will not retaliate against any employee who files a harassment complaint. An employee's refusal to submit to sexual advances or other types of harassment will not adversely affect the employee's employment, evaluation, wages, advancement, assigned duties, or any other condition of employment or career development. Employees who observe what they believe may be harassment of another employee should immediately report the matter to any supervisor, any Director, or the Human Resources Department.

PCHS will immediately investigate all complaints of harassment. All investigations will be handled with the greatest degree of confidentiality under the circumstances. At the conclusion of its investigation, PCHS will inform the complainant of the results of its investigation and take any necessary corrective action. The necessary corrective action can include reassignments and all forms of discipline, up to and including termination of employment.

#### **ACCEPTABLE USE POLICY: COMPUTER SYSTEM AND EMAIL**

PCHS owns the computers and the computer systems used in all PCHS's operations and offices. As such, the computers and computer systems (including the Internet and e-mail) are to be utilized for legitimate school related-business only in the course of employee's assigned duties. In addition to the system hardware and software, all electronic files and electronic messages are the property of PCHS, whether composed, received or sent by the employee. Consequently, employees do not have a reasonable expectation of privacy with respect to their usage of PCHS computers or computer systems. E-mail messages reflect directly on PCHS. All such messages should be composed in a professional manner that is similar to messages sent on PCHS letterhead. All e-mail messages and other electronic files constitute business records belonging to PCHS.

Use of PCHS computers and computer systems (including the Internet and e-mail) is subject to PCHS's policy which prohibits the harassment of employees or using any inappropriate or offensive language.

PCHS reserves the right to monitor use of PCHS's computer systems, including the e-mail system or the Internet, at any time. Employees should not consider data stored on their PCHS computer, their Internet usage or e-mail communications to be private. Employees should be aware that deleted files may be retrieved and read by PCHS. PCHS reserves the right to retrieve, monitor, or review any messages, as well as Internet usage data, in PCHS's systems, and may disclose such messages or data for any purpose without notice to the person sending or receiving the message and without seeking permission of the person. Personal passwords are not an assurance of confidentiality and the Internet itself is not secure. All passwords must be made known to PCHS, and passwords not known to PCHS may not be used.

Any software or other material downloaded into the PCHS's computers may be used only in ways consistent with the licenses and copyrights of the vendors, authors or owners of the material. Prior written authorization from the IT Coordinator is required before introducing any software into PCHS's computer system. Employees may not download software, games or other software unrelated to their work.

Only authorized employees may communicate on the Internet on behalf of the PCHS. Employees may not express opinions or personal views that could be misconstrued as

being those of the PCHS. Employees may not state their PCHS affiliation on the Internet unless required as part of their assigned duties.

Questions regarding the deletion of files should be addressed to the IT Coordinator.

Any violation of this policy may result in loss of computer Internet access and, if appropriate, subject the employee to disciplinary action, up to and including termination.

Employees learning of any misuse of PCHS's computer system, including e-mail or the Internet or violations of this policy, shall immediately notify their supervisor or the Human Resources Director.

## **BLOGGING**

Personal Web sites and Web logs (blogs) and other online tools have become a key component of open exchange and education and PCHS respects the rights of employees to use blogs as methods of self-expression. If using an external blog and an employee chooses to identify himself or herself as a PCHS employee on a Web site or Web log, the employee must adhere to the following guidelines:

- Make it clear to the readers that the views expressed are the employee's alone and that they do not necessarily reflect the views of PCHS.
- Do not disclose any information that is confidential or proprietary to PCHS or to any third party that has disclosed information to PCHS. Consult PCHS's Confidentiality Policy for guidance about what constitutes confidential information.
- Uphold PCHS's value of respect for the individual and avoid making defamatory statements about PCHS students, employees, stakeholders, partners, affiliates and others.
- If blogging activity is seen as compromising PCHS and interferes with the employee's ability to effectively perform their job duties at PCHS, PCHS may request a cessation of such commentary and the employee may be subject to disciplinary action, up to and including termination.

For any questions about these guidelines or any matter related to personal Web sites or blogs, contact Human Resources.

## **COPYRIGHT INFRINGEMENT**

It is the policy of PCHS to support and follow all copyright laws. Therefore, the violation of the copyright of any software or printed material is strictly prohibited. Employees shall not improperly copy any software or other document on PCHS's equipment, including but not limited to its computers or photocopiers. All employees are required to



comply with the Acceptable Use Policy and Code of Ethics statements. Violation of this policy could result in disciplinary action, including immediate termination.

### **USE OF PHONE SYSTEM**

PCHS maintains the telephone system for business purposes. Voice mail messages reflect directly on PCHS and all such messages should be composed in a professional manner that is similar to messages sent on PCHS letterhead. Use of the PCHS's voice mail message system is subject to PCHS's policy that prohibits the harassment of employees or using any inappropriate or offensive language.

Because all messages are the property of PCHS, employees should not expect that the messages they send or receive are private. Employees should be aware that deleted messages may be retrieved by PCHS. PCHS reserves the right to retrieve, monitor, or review any messages in PCHS's systems, and may disclose such messages for any purpose without notice to the person sending or receiving the message and without seeking permission of the person. Passwords must be disclosed to the appropriate PCHS representatives upon request.

Personal use of telephones for local calls is permitted during authorized breaks and lunch-time only. Except upon prior approval from the employee's supervisor, or in the case of an emergency, personal use of telephones for toll calls and at times other than authorized breaks and lunch-time is not permitted. Employees will be required to reimburse PCHS for any charges resulting from the unauthorized personal use of PCHS telephones. Friends and relatives should be discouraged from calling employees during working hours unless there is an emergency.

If PCHS determines that an individual is excessively using the telephone system for personal matters or otherwise abusing the privilege to use the telephone system, PCHS has the right to further restrict employee use of PCHS's telephone system. Employees who violate PCHS rules regarding use of the telephone system are subject to discipline, up to and including termination of employment.

### **USE OF MOBILE/CELLULAR PHONES**

Out of respect to other employees, personal cellular phones should be changed to vibrate or silent mode when in the office or classrooms. Except in cases of emergency, employees are prohibited from making or receiving calls on their personal cellular phone during working hours, except during rest and meal periods. In addition, the use of the camera or camera-equipped cellular phones is restricted to PCHS-sponsored social events. Photos of students or employees should not be taken without their permission. Employees are expected to comply with state laws regarding the use of cellular phones while driving on PCHS business.

Use of PCHS cell phones or personal cell phones in the office is subject to PCHS's policy that prohibits the harassment of employees or using any inappropriate or offensive language.

## **MAIL**

PCHS is not in a position to handle personal mail. Employees should ensure that all personal mail be sent to their homes. All mail sent to PCHS, regardless of whose name appears on the envelope, may be opened as official PCHS business mail.

Except upon prior approval, the use of PCHS-paid postage for personal correspondence is not permitted. Where prior approval is granted, the employee may be required to reimburse PCHS for the postal charges incurred.

## **BULLETIN BOARDS AND NEWSLETTERS**

Administrative bulletins, week-at-a-glance emails, updates and newsletters contain important information relative to all PCHS employees. These are often sent via email to all employees. In addition, you should take time to review information posted on the bulletin board in the main office and check it for new information.

## **EMPLOYEE MEAL AND REST PERIODS**

Consistent with any additional requirements under applicable collective bargaining agreements, full-time classified employees are provided with a thirty-minute (30) unpaid meal period, to be taken approximately in the middle of the workday. Full-time classified employees are also allowed a 10-minute rest period in the morning and a 10-minute rest period in the afternoon scheduled by the employee's supervisor, and such employees are expected to observe assigned working hours and the time allowed for meal and rest periods. Part-time employees working more than 3.5 hours per day are entitled to one 10-minute break, generally scheduled in the middle of their work day.

Employees may not leave the premises during a rest period but may leave the premises during the meal period. If the employee leaves the campus at anytime during their scheduled work day, they must sign out in the main office, and sign in upon their return.

Each certificated employee shall, except in emergencies or special situations requiring intensive supervision, be entitled to a duty-free lunch period of not less than thirty (30) minutes, as scheduled by the site administrator.

## **DRUG, ALCOHOL AND SMOKE-FREE WORKPLACE**

PCHS is committed to providing a drug and alcohol free workplace and to promoting safety in the workplace, employee health and well-being, customer confidence and a work environment that is conducive to attaining high work standards. The use of drugs and alcohol by employees, whether on or off the job, jeopardizes these goals, since it

adversely affects health and safety, security, productivity, and public confidence and trust. Drug or alcohol use in the workplace is extremely harmful to workers.

The bringing to the work place, possession or use of intoxicating beverages or drugs on any PCHS premises is prohibited and will result in disciplinary action up to and including termination.

Smoking is prohibited on PCHS property, in PCHS facilities, and in PCHS vehicles.

## **UNIFORM COMPLAINT PROCEDURES**

PCHS shall investigate and seek to resolve complaints at the local level. PCHS shall follow uniform complaint procedures addressing complaints alleging the School's failure to comply with state or federal law in adult education, consolidated categorical aid programs, migrant education, vocational education, child care and development programs, child nutrition program, and special education programs. A copy of the PCHS uniform complaint policy is available upon request from the Executive Director. Other complaints shall be addressed through the internal complaint policy or any grievance procedure in any applicable collective bargaining agreement.

## **COMPLAINT POLICY**

PCHS believes that if you have a question, suggestion or complaint, you should first discuss this with your supervisor. If the problem is not resolved, or if you are not comfortable discussing the concern with your supervisor, you may present the problem to the Director responsible for your department. The Director will work with Human Resources Director to reach a final resolution. This policy is not intended for use to complain about personnel actions taken against an employee.

This procedure, which we believe is important for both you and PCHS, cannot guarantee that every problem will be resolved to your satisfaction. However, PCHS values your observations and you should feel free to raise issues of concern, in good faith, without the fear of retaliation.

- **Notification**

This policy is intended to address complaints filed by employees against employees, students against other students or employees, parent complaints against employees and students, and community member complaints against employees and students.

- **Procedures**

Depending on the nature of the complaint, the complainant will be provided information concerning the applicable policy and procedures to be followed. If there is no applicable policy or procedures, the Director (or designee) shall encourage the parties involved to seek an informal resolution of the issues. If this is not possible due to the nature of the

complaint or if informal resolution has been unsuccessfully attempted, the Director (or designee) shall undertake a responsible inquiry into the complaint to ensure it is reasonably and swiftly addressed. When appropriate, a written statement of the complaint will be obtained from the complainant.

If the complainant files a written complaint and no other school policy or procedure is applicable, the Director (or designee) shall abide by the following process:

1. Within 10 working days of the receipt of the complaint, or as soon as is practicable under the circumstances, the Director or designee shall use his or her best efforts to speak with the parties identified in the complaint and to ascertain the facts relating to the complaint.
2. In the event that the Director (or designee) finds that a complaint against a staff member or student is valid, appropriate disciplinary action may be taken against the employee or student. As appropriate, the Director (or designee) may also simply instruct employees or students as to their conduct without initiating disciplinary measures.
3. In the event that the Director (or designee) finds that the complaint would best be resolved through a meeting of all parties, such a meeting may be arranged. If such a meeting does not successfully resolve the matter, the Director (or designee) shall respond to the complaint and provide all parties with a written statement indicating the Director's findings.
4. The Director's (or designee's) decision relating to the complaint shall be final unless it is appealed to the Board of Directors of PCHS. In the event a party wishes to appeal the decision, he/she shall submit a written request for the Board of Directors to hear the appeal to the Chair of the Board of Directors within 5 business days of the Director's decision. The Chair of the Board of Directors shall schedule a meeting before the Board. Such proceedings shall typically be conducted in closed session. The decision of the Board of Directors shall be final.

- **Confidentiality**

Complainants will be notified that information obtained from the complainants and thereafter gathered will be maintained in a manner as confidential as possible, but absolute confidentiality cannot be assured.

- **Non-Retaliation**

Complainants will be advised that they will be protected against retaliation as a result of the filing of any complaints or participation in any complaint process.

- **Resolution**

The administration will investigate complaints appropriately under the circumstances and pursuant to the applicable procedures, and if necessary, take appropriate remedial measures to ensure effective resolution of any complaint.

## **GRIEVANCES**

A grievance is an allegation that a provision of an applicable collective bargaining agreement has been violated, misapplied, or misinterpreted. If you believe this is the case, you should promptly present the grievance in accordance with the procedures outlined in the applicable collective bargaining agreement. Forms are available at your work site or in the Personnel Department.

## **VISITORS / GUEST SPEAKERS**

- All visitors are required to sign in at the front office upon arriving on campus. Such visitors shall be given a visitor's badge and must obey all School rules and directives. Failure to do so may lead to revocation of a visitor's permission to visit.

Employees should notify the Receptionist of any expected visitors prior to the scheduled appointment. The appropriate PCHS employee will be notified by the Main Office when a visitor has arrived. New visitors to PCHS must be escorted by an employee to the appropriate department or meeting area. Visitors are expected to have made an appointment with PCHS employee(s) prior to arriving at the main office.

Guest speakers must be approved twenty-four (24) hours prior to presentation by the Principal or his/her designee. A Guest Speaker Form is available in the main office.

No solicitation is allowed inside or outside PCHS offices. Unexpected visitors may be refused entrance and/or removed from the PCHS's premises by local law enforcement officials.

## **DRESS AND GROOMING STANDARDS**

Our stakeholders and community not only judge us all by what we do, but how professionally we present ourselves. Employees should therefore exercise good judgment in determining their dress and appearance. If you have any questions, contact your department chair or Human Resources.

## **ATTENDANCE AND PUNCTUALITY**

All employees are expected to arrive at work consistently and on time. Absenteeism and tardiness negatively affects PCHS's ability to implement its educational program and disrupts consistency in students' learning.

## **ABSENCES**

Regular attendance and punctuality are essential requirements for continued employment and are also considered in recommendations for job advancement. Excessive absences or failure to report absences in a timely fashion are unacceptable and could result in negative consequences. Arrangements with your supervisor should be made in advance for all absences which can be foreseen. When you are absent because of illness or personal reasons, notify your supervisor as promptly as possible prior to the commencement of the workday.

Vacation periods are scheduled with the approval of your immediate supervisor or department chair. You should refer to the applicable collective bargaining agreement or appropriate Working Conditions for specifics regarding absences.

### **Call-in Procedures for Each Department**

When first reporting to your new job, you should check with your immediate supervisor as to the applicable call-in procedures when absent from your assignment. When calling the Main Office to report your absence or late report to work, be sure to give your name, classification, length of absence, and reason. If you have received notification of jury duty, you must notify the Main office each day that you are required to report. Depending on your department requirements, you may also need to notify your supervisor.

## **REPORTING ABSENCES**

Signed absence forms must be completed for each absence. These forms may be obtained from the School's Main Office. A form will be placed in the employee's time card for signature after an absence.

## **OUTSIDE EMPLOYMENT/PROVIDING ADDITIONAL SERVICES TO PCHS**

Full-time employees choosing to work in a second job or who do consulting or other work for pay on an intermittent basis may do so only under the following conditions:

- The employee's position with the PCHS is primary and any additional employment will not interfere with the ability to perform his/her duties with PCHS.
- All work performed for another employer or in a secondary position with PCHS will be done during non-PCHS work hours, i.e., time when the employee is not assigned to his/her primary position.
- Such additional employment will not create a conflict of interest with the PCHS or a component school district.

- Any outside employment will not constitute double payment for services already provided by the employee as part of his/ her regular duties to the PCHS; that is, payment by another agency will not be made for work which is already part of or integral to the employee's regular position.

#### **10/11-month basis Certificated and Classified Staff:**

Any outside employment should occur during non-work hours when the employee is not expected to be providing services to the PCHS, i.e., after the end of the employee's regular work day or during breaks in the school calendar. Any additional work for PCHS for which the employee receives compensation (such as adult education classes, tutoring, etc.) should not interfere with the employee's regular duties to the PCHS. Personal or unpaid leave may not be used for the purposes of pursuing or performing outside employment.

#### **12-month basis Certificated and Classified Staff:**

Any outside employment should occur during non-work hours when the employee is not expected to be providing services to the PCHS, i.e., after the end of the employee's regular work day or during personal vacation time. In the latter case, vacation may only be used for such purposes if it will not unduly interfere with the providing of services to PCHS. Any additional work for PCHS for which the employee receives compensation (such as adult education classes, tutoring, etc.) should not interfere with the employee's regular duties to the PCHS.

This outside employment may give rise to a conflict of interest. Please talk to your supervisor or Human Resources if you have any questions.

#### **Employees Providing Additional Services to PCHS:**

Consistent with any collective bargaining agreement, PCHS may contract, either directly or indirectly, with a full-time or part-time employee for the purpose of supplying goods or services for PCHS, above and beyond his/her normal position, provided that the employee does not have the power or duty to negotiate, prepare, authorize, or approve the contract, or authorize or approve payment under the contract, audit bills, or claims under the contract, or the power or duty to appoint an officer or employee who has any of these powers or duties. It is understood that in all such cases, procedures for awarding such contracts will adhere to all budgetary, legal and ethical guidance.

PCHS may employ persons or individuals as independent contractors where such status is established as per applicable law. Final determination regarding employer/employee relationships will be made by the Executive Director and/or Principal.

## **REPORTING CHANGES FOR HUMAN RESOURCES RECORDS**

To maintain accurate, up-to-date records, you must inform Human Resources of changes in name, address, telephone number, marital status, dependents, insurance and voluntary deductions to be made from your pay. These changes are important since they affect your insurance, retirement or payroll status. Change Forms are available from Human Resources.

## **AT-WILL POSITIONS**

While most employment with PCHS is contractual and negotiated regularly with the applicable collective bargaining unit, some employees and all extra positions are employed on an at-will basis. As such, employment in these positions may be terminated with or without cause, and with or without advance notice at any time by the employee or PCHS. Nothing in this handbook, in any of PCHS's policies or procedures, or any oral statements or course of conduct shall alter or in any way modify the at-will nature of these specific positions at PCHS.

No manager, supervisor, or employee of PCHS has any authority to enter into an agreement for employment for any specified period of time or to make an agreement for employment on other than an at-will basis. Only the Board of Directors through the Executive Director and/or Principal have the authority to make any such agreement, which is binding only if it is in writing and signed by the Board of Directors Chair and the Executive Director and/or Principal.



#### **IV. EMPLOYEE CONDUCT AND CODE OF ETHICS**

In addition to the policy below, the applicable collective bargaining agreement shall also address and govern employee conduct.

##### **CODE OF ETHICS OVERVIEW**

It is critical at PCHS that all employees strive for excellence in the public service that they provide. As an employee of PCHS, you are expected to conduct yourself fairly, honestly and with the highest integrity. This means treating coworkers, students, parents and other customers with respect and in a manner that is exactly the way you would want to be treated. This also means being respectful of the school's resources and property.

Recognizing that each of us plays a critical role in student success, striving for excellence is not only a personal commitment, but also a personal responsibility that all school employees share.

##### **EMPLOYEE AND STUDENT RELATIONS**

PCHS employees are entrusted with the physical and mental well-being of every student. Therefore, employees shall treat students with respect and care and be aware of their proper roles as public servants, role models and contributors to student development.

Employees are to help to develop each student's self image; respect the dignity of each student, strive to develop positive student attitudes or self-worth and competence.

Employees shall not exploit, harass or discriminate against any student or require students to perform work or services that could be detrimental to their health.

##### **ACTIONS AND CONDUCT OF SCHOOL EMPLOYEES**

PCHS employees shall not only be aware that public service is a public trust, but also conduct themselves, both inside and outside the school's service in a manner that deserves the respect of students, parents and the communities the school serves.

##### **CONFLICT OF INTEREST**

PCHS maintains a detailed conflicts of interest policy. A copy of this policy is in the appendix

. PCHS employees shall not make or influence a school decision which will benefit the employee's outside employment, business or personal finances, or benefit a family member or personal friend.

## **ACCEPTANCE AND OFFERING OF GIFTS, FAVORS AND GRATUITIES**

PCHS employees shall not accept any gifts, money or favors which might reasonably be interpreted as an attempt to influence their actions with respect to school business. It will be presumed that a gift or gifts valued in excess of \$100 during a calendar year from any single person or organization (exclusive of a gift exchange based on personal relationships outside the school) constitute an attempt to influence official school business. Employees shall not offer gifts, money or favors which might be interpreted as an attempt to influence the official actions of another employee or service provider with respect to school business.

## **SCHOOL RECORDS**

PCHS employees shall not create false, misleading or artificial documents or entries in school accounts, time reporting records or other manual or electronic records. Records and regulated documents must be maintained in accordance with relevant laws and regulations.

## **USE OF CONFIDENTIAL INFORMATION**

Volunteers who are allowed access to confidential information must first sign an acknowledgement and agreement form to not disclose such information to any unauthorized persons and to fully comply with all School rules and regulations with regard to such information.

PCHS employees shall not disclose confidential information acquired by them in the course of their employment with the school, or use such information for speculation or personal gain.

## **USE OF SCHOOL FACILITIES, EQUIPMENT AND EMPLOYMENT STATUS**

PCHS employees shall not use PCHS facilities, equipment or supplies for other than PCHS authorized purposes. PCHS employees shall not use or attempt to use their position to secure unwarranted privileges for themselves or others.

In addition, all employees are provided necessary tools to complete their required tasks (computer equipment, athletic equipment, textbooks, school-related records, roll books, etc.). These are the property of PCHS and employees of PCHS must provide the appropriate care and oversight of these items. Damage to or loss of items must be reported to the department chair or immediate supervisor promptly.

## **EMPLOYMENT SOLICITATION**

School employees should not use their authority over a particular matter to negotiate future employment with any person or organization. Employees shall not make or influence a school decision involving the interests of a person with whom they have an agreement concerning current or future employment or remuneration of any kind.

Further, use of proprietary PCHS information in any future employment with another employer is absolutely prohibited. For one year after leaving school service, former school employees may not represent any person or organization for compensation other than the school in connection with any matter pending before the school that, as school employees, they participated in personally and substantially. Nothing in this paragraph shall be taken to limit in any manner the outside employment of employees where the interests of the school are protected.

#### **CONDUCT WITH RESPECT TO PERFORMANCE ON THE JOB**

Employees of the school are responsible for and accountable for the performance of the specific assignments they are employed to perform. Employees shall not conduct personal business or outside employment activities during their assigned school work hours.

## **V. HEALTH AND SAFETY**

### **CRIMINAL BACKGROUND CHECKS**

No employee or volunteer shall be permitted to commence work at PCHS until clearance has been obtained with the Department of Justice. Consistent with PCHS policy, PCHS may require the fingerprinting of some volunteers and vendors.

PCHS will require each employee to furnish a criminal record summary, through fingerprinting, as described in Section 44237 of the California Education Code. The school will comply with all of the health and safety laws common to the State of California and to the communities within which it operates. The Executive Director or designee will be responsible for maintaining compliance with Section 44237 and all applicable health and safety laws.

### **REPORTING SUSPECTED CHILD ABUSE**

California Penal Code section 11166 requires any child care custodian who has knowledge of, or observes, a child in his or her professional capacity or within the scope of his or her employment whom he or she knows or reasonably suspects has been the victim of child abuse to report the known or suspected instance of child abuse to a child protective agency immediately, or as soon as practically possible, by telephone and to prepare and send a written report thereof within thirty-six (36) hours of receiving the information concerning the incident.

For purposes of California Penal Code section 11166, a "child care custodian" includes:

- a. any person employed as a teacher, a teacher's aide, a teacher's assistant, or an instructional aide by any public or private school who has been trained in the duties imposed by California Penal Code section 11166;
- b. a classified employee of any public school who has been trained in the duties imposed by California Penal Code section 11166; or
- c. administrative officers, supervisors of child welfare and attendance, or certificated pupil personnel employees of any public or private school.

By executing the acknowledge at end of this Handbook, each employee certifies that he/she has knowledge of California Penal Code section 11166 and will comply with its provisions.

The Board of Directors recognizes that children have the right to an educational environment which does not threaten their physical and emotional health and development. Child abuse by school personnel violates this right and therefore is strictly prohibited. The Executive Director and Principal are directed to ensure that all employees are informed of this policy. Every school employee who suspects an

incident of child abuse of a student by PCHS personnel shall immediately report all information to the Executive Director, Principal, Special Education Coordinator, or Human Resources Director. It shall be the responsibility of the Executive Director and the Principal or their designee to promptly and thoroughly investigate and document any suspected incident of child abuse of students by an employee. The Executive Director and Principal may prohibit unsupervised student contact by any PCHS employee who is the subject of investigation of a suspected incident of child abuse until resolved.

No PCHS Human Resources or Board member, with the exception of the Executive Director and Principal and/or designee, shall make any statements or release any information which identifies or could be used to identify a suspected victim or perpetrator of child abuse to the public, media, staff, and/or student body while an investigation is pending.

The Executive Director and Principal shall contact law enforcement authorities concerning a suspected incident of child abuse of a student when the totality of the facts and circumstances warrant the intervention of law enforcement authorities. PCHS personnel shall cooperate to the extent possible with the investigation and prosecution of suspected abuse of a student. PCHS recognizes that any individual may contact law enforcement authorities concerning a suspected incident of abuse of a student.

## **SAFETY**

PCHS is committed to the well-being of all employees, students, and the public. PCHS takes every precaution to assure safety in our school. Be careful at all times and use proper safety procedures. PCHS safety program is overseen by the Director of Student Services working with the Operations Manager. A detailed safety program is in place and all staff are provided with safety rules. In addition, regular drills occur, ensuring understanding of and compliance with safety requirements. If you become aware of a safety issue, report it immediately to the Student Services Director, the Operations Manager or the Human Resources Director.

## **ON-THE-JOB INJURY**

If you are injured while at work, report the accident immediately to your supervisor and ask for an accident report form. An accident report form and other appropriate forms should be completed.

PCHS carries Workers' Compensation Insurance. An accident report must be completed for all on-the-job injuries, whether you go to the doctor or not. **If you go to the doctor, you must bring the Human Resources Department a release from your physician to return to full or modified work before reporting to your work site.** If you have any questions concerning your injury or pay status, you should contact the Human Resources Department.

## **EMERGENCY MANAGEMENT PLAN**

Consult with your department chair or supervisor regarding measures to take in emergency situations involving pupil accident, disasters, vandalism, and fire.

An emergency management plan for PCHS is developed and updated every year. The emergency plan provides for sheltering, evacuation, early dismissal, written notification to students and staff, and an annual drill in conjunction with local and county emergency preparedness administrators. The plan is available for public inspection and there are copies located in the Attendance Office. Questions about the PCHS emergency management plan should be directed to the Director of Admissions, Attendance, and Student Welfare

## **EMERGENCY CLOSING PROCEDURES**

- **Instructional Staff**

On days when the PCHS campus is closed due to hazardous or emergency conditions for students, instructional staff assigned to PCHS do not have to report. Instructional staff includes teachers, teacher aides and assistants, and other employees providing direct instruction or instructional assistance to students (if you have a question regarding your status as either instructional or non-instructional staff, please contact your supervisor). Such days will not be deducted from any accumulated leave. Instructional staff who had previously applied for sick or personal leave for such days are not available for work, and will have such time charged against the appropriate leave accumulation.

On occasions when instructional staff make the determination he/she cannot report on time due to hazardous weather or emergency conditions, and PCHS is open, he/she must call the main office and his/her department chair or immediate supervisor to report his/her absence and take personal leave for the time lost. The same shall apply for staff members who make the determination to leave work early due to extreme weather conditions and secure approval from his/her supervisor before leaving. If the employee does not have personal business leave available, he/she will take the day or time without pay.

- **For Non-instructional Staff**

Administrators and support staff, unless informed otherwise, will be required to report to work on days when program(s) or campuses are closed due to hazardous or emergency conditions for students. It is expected that staff will report to work at the normal required time for his/her position. If the PCHS Executive Director and/or Principal or designee makes the determination to close or delay the opening of offices and buildings for non-instructional staff, such staff members will be paid and will not have such days deducted from accumulated leave. Non-instructional staff members

who had previously applied for sick, personal business, or vacation leave for such days are not available for work, and will have such time charged against the appropriate leave accumulation.

On occasions when non-instructional staff make the determination he/she cannot report on time due to hazardous weather or emergency conditions, and his/her work site is open, he/she must call his/her supervisor to report the absence and take personal business leave, vacation leave, or unpaid leave for the time lost. The same shall apply for non-instructional staff members who make the determination to leave work early due to extreme weather conditions and secure approval from his/her supervisor before leaving. With the approval of his/her immediate supervisor, a non-instructional staff member may arrange to make up such hours lost. In all cases, custodial staff is expected to report to work on time, as soon as conditions allow, or at a time determined by his/her supervisor, to prepare the campuses for opening or to deal with other similar situations.

- **Early Closing**

When PCHS closes a building or campus early due to an emergency or weather related reason, PCHS operations and maintenance staff will remain on duty. Staff will be expected to report to work unless a county-wide state of emergency which results in the roads being closed by order of the Police or County Sheriff, either at PCHS or in the immediate vicinity of their home has been imposed.

- **State of Emergency**

When employees are unable to report to work due to the imposition of a county wide state of emergency which results in the roads being closed by order of County or State personnel, either at PCHS or in the immediate vicinity of their home, payment for non-worked time will be through using accrued vacation or sick time, non-paid time, or as outlined in the appropriate collective bargaining agreement. This will not apply if the employee had previously applied for vacation or personal leave for the day in question. Except for staff members under the various collective bargaining agreements, the same will apply for employees who have previously applied for sick leave. A staff member not reporting due to a state of emergency will notify his or her supervisor as soon as possible.

The radio stations that broadcast emergency closings for PCHS are: **KNX 1070 AM, KFVB 980 AM, KFI 640 AM**

## **REPORTING ACCIDENTS**

No matter how minor, all accidents which occur while working must be reported at the earliest possible time to your department chair or immediate supervisor using the Accident Report Form. Workers' Compensation Insurance coverage is provided for your

protection. The PCHS accident reporting procedure and form can be found in Appendix [FILL IN to be scanned and added].

### **EMERGENCY CRISIS**

If a life threatening emergency exists, dial 911 for immediate assistance and notify school administration immediately.

### **LOITERERS**

Be alert to the presence of strangers on school premises. Do not hesitate to inquire as to the name and business of any person found on the grounds or in the buildings. Report any questionable person to your department chair, immediate supervisor Executive Director or Principal.



## **VI. DISCIPLINE AND TERMINATION OF EMPLOYMENT**

All discipline will be carried out in accordance with any applicable collective bargaining agreement provisions and/or legal requirements. For those positions which are at-will in nature, PCHS may, in its sole discretion, with or without cause or advance notice utilize whatever form of discipline is deemed appropriate under the circumstances, up to, and including, termination of employment.

### **SEPARATION**

Should employees who are not at-will employees of the School decide to leave PCHS, appropriate advance notice is required, as maybe outlined in the applicable collective bargaining agreement.

### **RESIGNATIONS**

Resignations must be submitted to Human Resources in writing. You should give PCHS at least two (2) weeks notice, if possible.

### **RETIREMENT**

Retirement forms should be submitted at least ninety (90) days in advance of the retirement date.

Classified employees of PCHS are required by law to become members of the Public Employees Retirement System (PERS). Should an employee, in the future, go to work for some other school in the state (except San Francisco), or for the State of California, the employee's retirement membership shall be transferred. An employee will retain credit for the service already rendered at PCHS. Should an employee leave after five (5) years of service, the employee may elect to leave funds in PERS or withdraw the entire amount. New full-time employees and former PERS members become members at the beginning of the pay period following their initial employment date. Part-time employees become members if their regular work schedule is four (4) hours or more per day. For more information about CalPERS, or to check on your account, visit their website at [www.calpers.com](http://www.calpers.com), or call them at 888-225-7377.

Any certificated employee working more than four hours a day, automatically becomes a member of the State Teachers Retirement System (STRS). Both the employee and PCHS contribute to this system. The employee's earnings are not covered under Social Security. When the employee retires, or becomes disabled, the employee may receive a STRS pension, based upon the employee's earnings to date. Eligible certificated employees are required to participate in the CalSTRS retirement system. CalSTRS provides benefits based upon a member's years of service, age, and highest compensation level. In addition, benefits are provided for disability and death, with payments, in some cases, going to survivors or beneficiaries of eligible members. Both the employee and PCHS contribute to CalSTRS plan at a level determined by the state

legislature and the Teachers' Retirement Board. The Teachers' Retirement Board has exclusive control over the investment and administration of this fund. For more information about CalSTRS or to check on your account status, visit their website at [www.calstrs.com](http://www.calstrs.com) or call them at 800-228-5453.

## **VII. EMPLOYEE COMPENSATION AND BENEFITS**

### **PERMANENT STATUS**

Permanent employees shall enjoy the rights and benefits outlined in the applicable collective bargaining agreement. For those employees not covered by a collective bargaining agreement, the following policy applies.

### **SALARY**

Rate of pay is determined by the type of position to which an employee is assigned. Employees are listed by classification on a master salary schedule. A salary schedule may be obtained from the Human Resources Department. Salary will be set in accordance with the terms of a collective bargaining agreement if the position is represented, or under the terms of the employee's working conditions if in the non-represented group. Payments for graduate hours and degrees, which may be due under some agreements or working conditions, will only be made following submission of grade reports or other acceptable documentation.

### **PAY DAY**

Employees are paid on a monthly basis. Payroll warrants (pay checks) are normally issued on the tenth day of each month in payment for work performed during the previous month. Warrants will be delivered at the work site or may be picked up from the Payroll Department. Employees must notify the Payroll Department of intent to pick up the warrant at the Educational Services Center. Direct deposit is also available.

### **DEDUCTIONS**

Employee salary is subject to the following compulsory deductions:

- Federal and State Income Tax - The amounts withheld are determined by your salary and the number of dependents for whom you claim exemptions.
- Social Security
- Medicare Insurance
- Public Employees Retirement System (PERS) or State Teacher's Retirement System (STRS)
- State Disability Insurance (SDI)

Employees may also authorize the withholding of additional deductions for things such as credit union deposits, tax-sheltered annuities, and employee organization dues. Information regarding these and other deductions may be obtained from the Human Resources and Payroll Departments.

## **OVERTIME PAY**

Main Office hours are normally 7:00 a.m. – 4:00 p.m. Monday through Friday. The regular workday schedule for non-exempt employees is 8 hours; the regular workweek schedule is forty (40) hours. Exempt employees are also generally expected to be present during business hours and to commit whatever additional time is necessary to satisfactorily complete all job requirements.

Whether an employee is exempt from or subject to overtime pay will be determined on a case-by-case basis and will be indicated in the employee's job description. Generally, teachers and administrators are exempt. Non-exempt employees may be required to work beyond the regularly scheduled workday or workweek as necessary. Only actual hours worked in a given workday or workweek can apply in calculating overtime for non-exempt employees. PCHS will attempt to distribute overtime evenly and accommodate individual schedules. All overtime work must be previously authorized by your supervisor. PCHS provides compensation for all overtime hours worked by non-exempt employees in accordance with state and federal law as follows:

- For employees subject to overtime, all hours worked in excess of eight (8) hours in one workday or forty (40) hours in one workweek shall be treated as overtime. Compensation for hours in excess of forty (40) for the workweek or in excess of eight (8) and not more than twelve (12) for the workday, and for the first eight (8) hours on the seventh consecutive day in one workweek, shall be paid at a rate of one and one-half times the employee's regular rate of pay. Compensation for hours in excess of twelve (12) in one workday and an excess of eight (8) on the seventh consecutive workday of the workweek shall be paid at double the regular rate of pay.
- Exempt employees may have to work hours beyond their normal schedule as work demands require. No overtime compensation will be paid to these exempt employees.

## **HEALTH AND WELFARE BENEFITS**

Health and welfare benefits and employee eligibility are outlined in the applicable collective bargaining agreement. For unrepresented employees, eligibility for health and welfare benefits begins if the employee regularly works thirty (30) or more hours per week. Health and welfare benefit brochures are provided to all new full-time employees at the time of employment, or at employee eligibility.

- **Continuous Employee-Paid Health and Dental Insurance:**

An employee going on an approved unpaid leave from PCHS will pay his or her portion of the health and dental insurance premiums for the month providing the employee has worked or is on the payroll at least one day in that month and the said time is a continuation of the previous month's employment. If PCHS is closed due to a holiday or

the employee is on paid benefit, then said days are counted as days of employment for that month. An employee approved for unpaid leave must pay the total premiums for health and/or dental insurance in order to maintain such benefits starting the first day of the month following the effective date of unpaid leave. The employee will be invoiced monthly for insurance premiums. The premium is the amount currently charged PCHS by the health insurance provider and payment will be due on the first of the month. For an employee returning from an unpaid leave, PCHS will pay its portion of the health and dental insurance premium for the month an employee returns to work from unpaid leave providing:

- For 10-Month Employees: The employee submits in writing the intended date of return to work and the employee works at least one-half of the eligible days that could be worked that month.
  - For 12-Month Employees: The employee submits in writing the intended date of return to work and the employee works at least one-half of the eligible days that could be worked that month. The employee's work for that month must be continuous with the days of the upcoming months.
- **Discontinued Employee Health and Dental Insurance:**

Any employee who does not continue his/her health and/or dental insurance coverage during an unpaid leave will be re-enrolled on the first day of the month following his/her date of return to work. If you need more information please contact the Human Resources Office.

## **FLEXIBLE SPENDING PLAN**

PCHS offers a Section 125 flexible benefit plan. This plan allows employees to pay for some health and/or dependent care expenses on a pre-tax or pre-FICA basis. These accounts must be established annually, and are governed by the IRS. Employees cannot "opt" out of an established 125 plan until the next open enrollment period. Open enrollment takes place annually in November for the following calendar year.

## **RETIREMENT BENEFITS**

Employees are eligible to participate in either PERS or STRS depending on their employment classification and as outlined in the applicable collective bargaining agreement.

## **MILEAGE REIMBURSEMENT**

Employees who are required to travel in non-PCHS vehicles while performing their duties are reimbursed for mileage. Your supervisor will supply you with additional information if you are eligible for reimbursement.

## **CONFERENCE ATTENDANCE**

An employee requesting permission to attend a business-related conference must fill out the Conference or Workshop Request, Approval and Expense Voucher in advance. The request must be signed by both your immediate supervisor and the Executive Director or Principal or their designee. Payments will be made to hotels, travel agencies, airlines and conference officials if these expenses are known in advance. No cash or checks will be advanced to an individual attending a conference. All receipts covering approved conference expenses must be submitted to your supervisor for approval then submitted to Finance on a PCHS Expense Report/Reimbursement Form five working days following your return. After attending a conference, the Conference Report Form should be completed.

## **REIMBURSEMENT FOR BUSINESS EXPENSES**

You will be reimbursed for pre-approved business expenses incurred while conducting PCHS business. Such expenses must have the approval of your immediate supervisor. To claim reimbursement, all receipts for expenses **must** be PCHS Expense Report/Reimbursement Form. The receipts must be itemized on the voucher with the date(s) and purpose of the expenditure(s). To be considered for reimbursement, the Employee must have turned in within thirty (30) days of the Fiscal Year end.

## **VIII. HOLIDAYS, VACATIONS, AND LEAVES**

All holidays, vacations, and leaves shall be outlined in the applicable collective bargaining agreement. For those employees not covered by a collective bargaining agreement, the following policies apply.

### **HOLIDAYS**

Represented employees are entitled to time off for the holidays listed in the applicable collective bargaining agreement.

Unrepresented employees are entitled to time off for the holidays based on their work basis and as specified in the schedule attached to their specific annual work contract.

Holidays must be used on the day assigned, will not roll over, and will not be paid out at contract termination.

To qualify for holiday pay, employees must be a full time in paid status on the working day immediately preceding or following the holiday. Employees who are not assigned to work during the winter school recess receive pay for the two (2) holidays (December 25 and January 1) occurring during that period if they are in paid status on the work day immediately before or after the recess.

### **VACATIONS**

Represented employees are eligible for and accrue vacation in accordance with the applicable collective bargaining agreement.

Unrepresented employees shall be eligible for and accrue vacation in accordance with the schedule attached to their specific annual work contract. Vacation time is to be pre-approved and scheduled with the employee's immediate supervisor.

Paid Vacation Days accrue at a rate consistent with the schedule attached to the employee's annual contract. Employees who are hired at any time other than the start of the school year, will have their vacation pay prorated to the number of months worked in that school year. Unrepresented employees are able to accrue up to the amount specified in their individual contract. If the employee reaches their maximum accrual, they will not continue to accrue Paid Vacation until they have taken Paid Vacation time off.

With approval of the Executive Director or Principal, Paid Vacation may be advanced and used by the employee, but if he/she terminates his/her contract prior to contract end date, any used, unaccrued days will be deducted from final compensation. Unused Paid Vacation carries over from year to year up to a total of thirty (30) days, at which point no further Paid Vacation accrues until some is used. Accrued, unused Paid Vacation is paid out at termination of employment with Palisades Charter High School.

## **SICK/ILLNESS LEAVE**

Represented employees shall be granted sick leave in accordance with the applicable collective bargaining agreement.

Unrepresented employees are entitled to 10 paid sick days annually. Paid sick days accrue at a rate consistent with the employee's basis schedule as outlined in their contract. Employees may borrow against the contract year's paid sick days, but if the employee terminates his/her contract prior to their contract end date, any used, unaccrued days will be deducted from the final paycheck. Unused paid sick days will roll over as outlined by STRS and PERS, but will not be paid out at contract termination.

An employee who uses credit for sick/illness leave prior to actual accrual shall not accrue or be credited with additional absence hours until the negative balance has been restored. Employees who are hired at any time other than the start of the school year, will have their sick pay prorated to the number of months worked in that school year. Use of such leave prior to accrual is solely at the discretion of the Executive Director or Principal.

Employees who resign from any school district (not take a leave) will have their unused illness time honored by PCHS. Please see the Executive Director's Office for necessary paperwork.

## **ILLNESS LEAVE OF ABSENCE**

Represented employees are entitled to Illness Leaves of Absence as listed in the applicable collective bargaining agreement.

The unrepresented employee is entitled to leaves of absence in accordance with Federal and State law, including but not limited to Family Medical Leave Act (FMLA), Pregnancy Disability Leave (PDL), etc. During such leaves, such employees may also apply to the state for benefits such as State Disability Insurance or Paid Family Leave, etc.

## **INDUSTRIAL INJURY/ILLNESS LEAVE (WORKERS' COMPENSATION)**

PCHS, in accordance with State law, provides insurance coverage for employees in case of work-related injuries. The applicable collective bargaining agreement addresses leave in this section. Otherwise, the workers' compensation benefits provided to injured employees may include:

- Medical care;
- Cash benefits, tax-free to replace lost wages; and
- Vocational rehabilitation to help qualified injured employees return to suitable employment.



To ensure you receive any workers' compensation benefits to which you may be entitled, you will need to:

- Immediately report any work-related injury to your supervisor;
- Seek medical treatment and follow-up care if required;
- Complete a written Employee's Claim Form (DWC Form 1) and return it to the Workers Compensation Coordinator; and
- Provide PCHS with a certification from your health care provider regarding the need for worker's compensation disability leave as well as your eventual ability to return to work from the leave.

It is PCHS's policy that when there is a job-related injury, the first priority is to insure that the injured employee receives appropriate medical attention. PCHS, with the help of its insurance carrier has selected medical centers to meet this need. Each medical center was selected for its ability to meet anticipated needs with high quality medical service and a location that is convenient to the PCHS operation.

- If an employee is injured on the job, he/she is to go or be taken to the approved medical center for treatment. If injuries are such that they require the use of emergency medical systems (EMS) such as an ambulance, the choice by the EMS personnel for the most appropriate medical center or hospital for treatment will be recognized as an approved center.
- All accidents and injuries must be reported to the employee's supervisor and to the individual responsible for reporting to PCHS's insurance carrier. Failure by an employee to report a work-related injury by the end of his/her shift could result in loss of insurance coverage for the employee. An employee may choose to be treated by his/her personal physician at his/her own expense, but he/she is still required to go to PCHS approved medical center for evaluation. All job-related injuries must be reported to the appropriate State Workers' Compensation Bureau and the insurance carrier.
- When there is a job-related injury that results in lost time, the employee must have a medical release from PCHS's approved medical facility before returning to work.

## **UNPAID PERSONAL LEAVE OF ABSENCE**

A personal leave of absence without pay may be granted at the discretion of the Executive Director. Requests for personal leave should be limited to unusual circumstances requiring an absence of longer than two weeks. Approved personal absences of shorter duration are not normally treated as leaves, but rather as excused absences without pay.

## **PERSONAL NECESSITY LEAVE**

For all represented employees, the applicable collective bargaining agreement will govern.

All represented and unrepresented employees may use accrued sick leave and shall be granted a paid personal necessity leave when the gravity of the situations described below require the personal attention of the employee during assigned hours of service. The days allowed shall be deducted from and may not exceed the number of days of accrued full-pay illness leave to which the employee is entitled. Personal Necessity Leaves may be one of the following:

- a. Death of a close friend or relative not included in the definition of immediate family;
- b. Death of a member of employee's immediate family when time in excess of bereavement leave is required;
- c. Serious illness of a member of the employee's immediate family;
- d. Accident involving the employee's person or property or the person or property of a member of the employee's immediate family;
- e. Birth of a child of the employee, or adoption of a child by the employee;
- f. Religious holiday of the employee's faith;
- g. Imminent danger to the home of the employee occasioned by a disaster such as a flood, fire or earthquake;
- h. An appearance of the employee in court as a litigant. Each day of necessary attendance as a litigant must be certified by the clerk of the court. The employee must return to work in cases where it is not necessary to be absent the entire day;
- i. An appearance of the employee in court or governmental agency as a non-litigant witness under subpoena;
- j. Attendance at the classroom of the employee's own child or ward and meeting with the school administrator because of suspension; and,
- k. Attendance at the school of the employee's own child, ward or grandchild for purposes of a school activities leave provided by Section 230.8 of the Labor Code.

The total number of days allowed in one school year for personal necessity absence shall not exceed six (6) days per school year. If personal necessity absence is taken to attend to the illness of the employee's child, parent, or spouse, up to six (6) additional days may be utilized, if accumulated, in any calendar year (to total 12 maximum days).

The employee shall be required to verify the nature of such necessity. Such statement shall be filed with the main office no less than five (5) working days in advance of a religious holiday, court appearance or school visitation.

## **FAMILY CARE LEAVE**

Family and Medical Leave Act ("FMLA") and California Family Rights Act ("CFRA") leave shall be provided in accordance with federal and state law and the applicable collective bargaining agreement.

For employees not covered by a collective bargaining agreement, the following policy demonstrates PCHS's compliance with FMLA and CFRA leave requirements, both of which require PCHS to permit each eligible employee to take up to 12 workweeks of unpaid FMLA leave in any 12-month period for the birth/adoption of a child, the employee's own serious illness or to care for certain family members who have a serious illness. For purposes of this policy, all leave taken under FMLA or CFRA will be referred to as "FMLA leave."

- **Employee Eligibility Criteria**

To be eligible for FMLA leave, the employee must have been employed by PCHS for the last 12 months and must have worked at least 1,250 hours during the 12-month period immediately preceding commencement of the FMLA leave.

- **Events That May Entitle An Employee To FMLA Leave**

The 12-week FMLA allowance includes any time taken (with or without pay) for any of the following reasons:

1. To care for the employee's newborn child or a child placed with the employee for adoption or foster care. Leaves for this purpose must conclude 12 months after the birth, adoption, or placement. If both parents are employed by PCHS, they will be entitled to a combined total of 12 weeks of leave for this purpose.
2. Because of the employee's own serious health condition (including a serious health condition resulting from an on-the-job illness or injury) that makes the employee unable to perform any one or more of the essential functions of his or her job (other than a disability caused by pregnancy, childbirth, or related medical conditions, which is covered by PCHS's separate pregnancy disability policy).

3. To care for a spouse, child, or parent with a serious health condition.
  4. A "serious health condition" is an illness, injury, impairment, or physical or mental condition that involves: (1) inpatient care (i.e., an overnight stay) in a hospital, hospice, or residential medical care facility, including any period of incapacity or any subsequent treatment in connection with such inpatient care; or (2) continuing treatment by a health care provider.
- Amount of FMLA Leave Which May Be Taken
    1. FMLA leave can be taken in one or more periods, but may not exceed 12 workweeks total for any purpose in any 12-month period, as described below, for any one, or combination of the above-described situations. "Twelve workweeks" means the equivalent of twelve of the employee's normally scheduled workweeks. For a full-time employee who works five eight-hour days per week, "twelve workweeks" means 60 working and/or paid eight-hour days.
    2. The "12 month period" in which 12 weeks of FMLA leave may be taken is the 12 month period immediately preceding the commencement of any FMLA leave.
  - Pay During FMLA Leave
    1. An employee on FMLA leave because of his or her own serious health condition must use all accrued paid sick leave and may use any or all accrued paid vacation time at the beginning of any otherwise unpaid FMLA leave period.
    2. An employee on FMLA leave for child care or to care for a spouse, parent, or child with a serious health condition may use any or all accrued paid vacation at the beginning of any otherwise unpaid FMLA leave.
    3. All other FMLA leaves are unpaid leaves.
    4. The receipt of vacation pay, sick leave pay, or State Disability Insurance benefits will not extend the length of the FMLA leave. Vacation pay and sick pay accrues during any period of unpaid FMLA leave only until the end of the month in which unpaid leave began.
  - Health Benefits

The provisions of PCHS's various employee benefit plans govern continuing eligibility during FMLA leave, and these provisions may change from time to time. The health benefits of employees on FMLA leave will be paid by PCHS during

the leave at the same level and under the same conditions as coverage would have been provided if the employee had been continuously employed during the leave period. When a request for FMLA leave is granted, PCHS will give the employee written confirmation of the arrangements made for the payment of insurance premiums during the leave period.

- Seniority

An employee on FMLA leave remains an employee and the leave will not constitute a break in service. An employee who returns from FMLA leave will return with the same seniority he or she had when the leave commenced.

- Medical Certifications

1. An employee requesting FMLA leave because of his or her own or a relative's serious health condition must provide medical certification from the appropriate health care provider on a form supplied by PCHS. Failure to provide the required certification in a timely manner (within 15 days of the leave request) may result in denial of the leave request until such certification is provided.
2. If PCHS has reason to doubt the medical certification supporting a leave because of the employee's own serious health condition, PCHS may request a second opinion by a health care provider of its choice (paid for by PCHS). If the second opinion differs from the first one, PCHS will pay for a third, mutually agreeable, health care provider to provide a final and binding opinion.
3. Recertifications are required if leave is sought after expiration of the time estimated by the health care provider. Failure to submit required recertifications can result in termination of the leave.

- Procedures for Requesting and Scheduling FMLA Leave

1. An employee should request FMLA leave by completing a Request for Leave form and submitting it to the Head of School. An employee asking for a Request for Leave form will be given a copy of PCHS's then-current FMLA leave policy.
2. Employees should provide not less than 30 days' notice or such shorter notice as is practicable, for foreseeable childbirth, placement, or any planned medical treatment for the employee or his/her spouse, child, or parent. Failure to provide such notice is grounds for denial of a leave request, except if the need for FMLA leave was an emergency or was otherwise unforeseeable.

3. Where possible, employees must make a reasonable effort to schedule foreseeable planned medical treatments so as not to unduly disrupt PCHS's operations.
4. If FMLA leave is taken because of the employee's own serious health condition or the serious health condition of the employee's spouse, parent or child, the leave may be taken intermittently or on a reduced leave schedule when medically necessary, as determined by the health care provider of the person with the serious health condition.
5. If FMLA leave is taken because of the birth of the employee's child or the placement of a child with the employee for adoption or foster care, the minimum duration of leave is two weeks, except that PCHS will grant a request for FMLA leave for this purpose of at least one day but less than two weeks' duration on any two occasions.
6. If an employee needs intermittent leave or leave on a reduced leave schedule that is foreseeable based on planned medical treatment for the employee or a family member, the employee may be transferred temporarily to an available alternative position for which he or she is qualified that has equivalent pay and benefits and that better accommodates recurring periods of leave than the employee's regular position.
7. In most cases, PCHS will respond to a FMLA leave request within two days of acquiring knowledge that the leave is being taken for an FMLA-qualifying reason and, in any event, within 10 days of receiving the request. If an FMLA leave request is granted, PCHS will notify the employee in writing that the leave will be counted against the employee's FMLA leave entitlement. This notice will explain the employee's obligations and the consequences of failing to satisfy them.

- Return to Work

1. Upon timely return at the expiration of the FMLA leave period, an employee (other than a "key" employee whose reinstatement would cause serious and grievous injury to PCHS's operations) is entitled to the same or a comparable position with the same or similar duties and virtually identical pay, benefits, and other terms and conditions of employment unless the same position and any comparable position(s) have ceased to exist because of legitimate business reasons unrelated to the employee's FMLA leave.
2. When a request for FMLA leave is granted to an employee (other than a "key" employee), PCHS will give the employee a written guarantee of

reinstatement at the termination of the leave (with the limitations explained above).

3. Before an employee will be permitted to return from FMLA leave taken because of his or her own serious health condition, the employee must obtain a certification from his or her health care provider that he or she is able to resume work.
4. If an employee can return to work with limitations, PCHS will evaluate those limitations and, if possible, will accommodate the employee as required by law. If accommodation cannot be made, the employee will be medically separated from PCHS.

- **Limitations on Reinstatement**

1. PCHS may refuse to reinstate a "key" employee if the refusal is necessary to prevent substantial and grievous injury to PCHS's operations. A "key" employee is an exempt salaried employee who is among the highest paid 10% of PCHS's employees within 75 miles of the employee's worksite.
2. A "key" employee will be advised in writing at the time of a request for, or if earlier, at the time of commencement of, FMLA leave, that he/she qualifies as a "key" employee and the potential consequences with respect to reinstatement and maintenance of health benefits if PCHS determines that substantial and grievous injury to PCHS's operations will result if the employee is reinstated from FMLA leave. At the time it determines that refusal is necessary, PCHS will notify the "key" employee in writing (by certified mail) of its intent to refuse reinstatement and will explain the basis for finding that the employee's reinstatement would cause PCHS to suffer substantial and grievous injury. If PCHS realizes after the leave has commenced that refusal of reinstatement is necessary, it will give the employee at least ten (10) days to return to work following the notice of its intent to refuse reinstatement.

- **Employment During Leave**

An employee on FMLA leave may not accept employment with any other employer without PCHS's written permission. An employee who accepts such employment will be deemed to have resigned from employment at PCHS.

## **PREGNANCY DISABILITY LEAVE**

Pregnancy Disability Leave ("PDL") shall be provided in accordance with state law and the applicable collective bargaining agreement. For those employees not covered by a collective bargaining agreement, this policy explains how PCHS complies with the California Pregnancy Disability Act, which requires PCHS to give each female employee

an unpaid leave of absence of up to four (4) months, as needed, for the period(s) of time a woman is actually disabled by pregnancy, childbirth, or related medical conditions.

- **Employee Eligibility Criteria**

To be eligible for pregnancy disability leave, the employee must be disabled by pregnancy, childbirth, or a related medical condition and must provide appropriate medical certification concerning the disability.

- **Events That May Entitle An Employee to Pregnancy Disability Leave**

The four-month pregnancy disability leave allowance includes any time taken (with or without pay) for any of the following reasons:

1. The employee is unable to work at all or is unable to perform any one or more of the essential functions of her job without undue risk to herself, the successful completion of her pregnancy, or to other persons because of pregnancy or childbirth, or because of any medically recognized physical or mental condition that is related to pregnancy or childbirth (including severe morning sickness); or
2. The employee needs to take time off for parental care.

- **Duration Of Pregnancy Disability Leave**

Pregnancy disability leave may be taken in one or more periods, but not to exceed four months total. "Four months" means the number of days the employee would normally work within four months. For a full-time employee who works five eight hour days per week, four months means 88 working and/or paid eight hour days of leave entitlement based on an average of 22 working days per month for four months.

Pregnancy disability leave does not count against the leave which may be available as Family Care and Medical Leave.

- **Pay During Pregnancy Disability Leave**

1. An employee on pregnancy disability leave must use all accrued paid sick leave and may use any or all accrued vacation time at the beginning of any otherwise unpaid leave period.
2. The receipt of vacation pay, sick leave pay, or state disability insurance benefits will not extend the length of pregnancy disability leave.



3. Vacation pay and sick pay accrues during any period of unpaid pregnancy disability leave only until the end of the month in which the unpaid leave began.

- Health Benefits

The provisions of PCHS's various employee benefit plans govern continued eligibility during pregnancy disability leave and these provisions may change from time to time. When a request for pregnancy disability leave is granted, PCHS will give the employee written confirmation of the arrangements made for the payment of insurance premiums during the leave period.

- Seniority

An employee on pregnancy disability leave remains an employee of PCHS and a leave will not constitute a break in service. When an employee returns from pregnancy disability leave, he or she will return with the same seniority he or she had when the leave commenced.

- Medical Certifications

1. An employee requesting a pregnancy disability leave must provide medical certification from her healthcare provider on a form supplied by PCHS. Failure to provide the required certification in a timely manner (within fifteen (15) days of the leave request) may result in a denial of the leave request until such certification is provided.
2. Recertifications are required if leave is sought after expiration of the time estimated by the healthcare provider. Failure to submit required recertifications can result in termination of the leave.

- Requesting And Scheduling Pregnancy Disability Leave

1. An employee should request pregnancy disability leave by completing a Request for Leave form and submitting it to her supervisor. An employee asking for a Request for Leave form will be referred to PCHS's then current pregnancy disability leave policy.
2. Employee should provide not less than thirty (30) days or as short of notice as is practicable, if the need for the leave is foreseeable. Failure to provide such notice is grounds for denial of the leave request, except if the need for pregnancy disability leave was an emergency and was otherwise unforeseeable.

3. Where possible, employees must make a reasonable effort to schedule foreseeable planned medical treatments so as not to unduly disrupt PCHS's operations.
4. Pregnancy disability leave may be taken intermittently or on a reduced leave schedule when medically advisable, as determined by the employee's healthcare provider.
5. If an employee needs intermittent leave or leave on a reduced leave schedule that is foreseeable based on planned medical treatment, the employee may be transferred temporarily to an available alternative position for which he or she is qualified that has equivalent pay and benefits that better accommodates recurring periods of leave than the employee's regular position.
6. In most cases, PCHS will respond to a pregnancy disability leave request within two (2) days of acquiring knowledge that the leave qualifies as pregnancy disability and, in any event, within ten (10) days of receiving the request. If a pregnancy disability leave request is granted, PCHS will notify the employee in writing and leave will be counted against the employee's pregnancy disability leave entitlement. This notice will explain the employee's obligations and the consequences of failing to satisfy them.

- Return To Work

1. Upon timely return at the expiration of the pregnancy disability leave period, an employee is entitled to the same position unless the employee would not otherwise have been employed in the same position (at the time reinstatement is requested). If the employee is not reinstated to the same position, she must be reinstated to a comparable position unless there is no comparable position available, but filling that position with the returning employee would substantially undermine PCHS's ability to operate the business safely and efficiently. A "comparable" position is a position that involves the same or similar duties and responsibilities and is virtually identical to the employee's original position in terms of pay, benefits, and working conditions.
2. When a request for pregnancy disability leave is granted to an employee, PCHS will give the employee a written guarantee of reinstatement at the end of the leave (with the limitations explained above).
3. Before an employee will be permitted to return from a pregnancy disability leave of three days or more, the employee must obtain a certification from her healthcare provider that she is able to resume work.

4. If the employee can return to work with limitations, PCHS will evaluate those limitations and, if possible, will accommodate the employee as required by law. If accommodation cannot be made, the employee will be medically separated from PCHS.

- **Employment During Leave**

An employee on pregnancy disability leave may not accept employment with any other employer without PCHS's written permission. An employee who accepts such employment will be deemed to have resigned from employment.

### **JURY DUTY/WITNESS LEAVE**

For represented employees, please consult the applicable collective bargaining agreement.

It is the policy of PCHS for employees to provide jury service during periods when the continuity of instruction and school operations will not be adversely affected. For all non-exempt employees called to serve, such employees will be granted paid absence for up to ten (10) days of jury service. For exempt employees, such as teachers, such service will be in paid status so long as such employees provide services to PCHS during any week of jury service. Such work shall be conducted with the employee's supervisor.

If you are on phone call-in duty, you will be expected to come to work until called for service. You will be requested to provide written verification from the court clerk of performance of jury service.

### **VOTING TIME OFF**

If an employee does not have sufficient time outside of working hours to vote in an official state-sanctioned election, the employee may take off enough working time to vote. Such time off shall be taken at the beginning or the end of the regular working day, whichever allows for more free time. Under these circumstances, an employee will be allowed a maximum of two (2) hours of time off during an election day without loss of pay. When possible, an employee requesting time off to vote shall give his or her supervisor at least two (2) days notice.

### **BEREAVEMENT LEAVE**

Employees represented by a collective bargaining unit shall be granted bereavement leave in accordance with the applicable collective bargaining agreement.

For all other employees, such employees are entitled to a leave without loss of pay due to a death in the immediate family (parent, spouse, son/daughter, sister/brother, parents-in-law, son/daughter-in-law, grandparents, grandchild). Employees will be

granted up to three (3) days bereavement leave or up to five (5) work days if the family member is more than 200 miles from the employee's home.

## **MILITARY LEAVE**

Employees who wish to serve in the military and take military leave should contact the Executive Director for information about their rights before and after such leave. If you are a reservist called to active duty, you will receive pay for the first thirty (30) calendar days of your military leave, provided you have completed one (1) year of regular employment before your leave begins. Beyond thirty (30) calendar days, leave without pay will be granted for military service without loss of status. Illness and vacation privileges continue to accrue while you are on temporary military leave of up to 180 calendar days. While on leave, you will continue to accrue seniority credit. Upon completion of your military leave, you have a right to return to your former job classification as long as there is a vacancy or if you have more seniority than the least senior employee in your classification. You are entitled to reinstatement upon completion of military service, provided you return or apply for reinstatement within the time allowed by law.

## **LEAVE TO ATTEND CHILD'S SCHOOL ACTIVITIES**

Employees are encouraged to participate in the school activities of their child(ren). The absence is subject to all of the following conditions:

- Parents, guardians, or grandparents having custody of one or more children in kindergarten or grades 1-12 may take time off for a school activity;
- The time off for school activity participation cannot exceed eight hours in any calendar month, or a total of forty (40) hours each school year;
- Employees planning to take time off for school visitations must provide as much advance notice as possible to their supervisor;
- If both parents are employed by PCHS, the first employee to request such leave will receive the time off. The other parent will receive the time off only if the leave is approved by the Executive Director;
- Employees can or may use personal necessity leave in order to receive compensation for this time off;
- Employees who do not have paid time off available will take the time off without pay, and
- Employees must provide their supervisor with documentation from the school verifying that the employee participated in a school activity on the day of the absence for that purpose.

## **UNPAID LEAVE TO ATTEND CHILD'S SUSPENSION MEETING**

If an employee who is the parent or guardian of a child facing suspension from school is summoned to the school to discuss the matter, the employee should alert his or her supervisor and the Executive Director as soon as possible before leaving work. In

agreement with California Labor Code Section 230.7, no discriminatory action will be taken against an employee who takes time off for this purpose.

#### **FAILURE TO RETURN FROM LEAVE OF ABSENCE**

Failure to report to work after the expiration of any authorized leave of absence may be grounds for the PCHS to institute dismissal procedures.

## **IX. EMPLOYEE ADVANCEMENT AND PROFESSIONAL DEVELOPMENT**

### **CAREER ADVANCEMENT**

Certificated employees may apply for accelerated longevity increments after completion of approved college work or the equivalent. It is the responsibility of the employee to present additional documentation to PCHS for this increment. The increment will be paid as of the date documentation is presented. Additional requirements are described in the applicable collective bargaining agreement or see the Credentialing Clerk for more information.

### **JOB PROMOTIONS**

Job promotions are based on qualifications and an individual's personal abilities, educational background and related experience, and without regard to race, color, religion, gender, age, national origin, disability, marital or veteran status. If there is a posted position you wish to apply for, please submit your resume to Human Resources for consideration.

### **JOB POSTINGS**

To provide opportunity for career growth, all job openings in PCHS are posted on our website in the job opportunities section. Each vacancy notice will give you information on qualifications required and procedures for applying.

### **PROFESSIONAL DEVELOPMENT**

Whenever possible, opportunities are provided for personal skills development. In addition to on-site Professional Development programs, these may include Professional Conferences, college coursework or other approved programs. You should feel free to discuss such opportunities with your immediate supervisor or Human Resources for instructions on how to participate in these programs.

## **X. EVALUATION AND RECORD KEEPING**

### **JOB DESCRIPTIONS**

Each position within the PCHS has a job description. You should review yours regularly. When your responsibilities change, possible revisions to your job description should be discussed with your immediate supervisor. It is the responsibility of both you and your supervisor to keep your job description updated and accurate.

### **PERFORMANCE EVALUATION**

For those employees who are represented by an exclusive representative, the terms of the applicable collective bargaining agreement will dictate the procedures for performance evaluation.

Probationary employees are defined by the collective bargaining agreements. During your probationary period you should be evaluated at least twice. When you have successfully completed your probationary period and receive permanent appointment, you will be evaluated at least once annually, or as outlined in your collective bargaining agreement. Following an evaluation, you are encouraged to discuss the evaluation with your immediate supervisor (evaluator).

For all other employees, each employee will receive periodic performance reviews/evaluations conducted by a supervisor/administrator and reviewed by the Executive Director/Principal. The frequency of performance evaluations may vary depending upon length of service, job position, past performance, changes in job duties, or recurring performance problems.

Performance evaluations may review factors including but not limited to attendance, the quality and quantity of the work, knowledge of the job, initiative, work attitude, and attitude toward others. Performance evaluations are intended to make employees aware of progress, areas for improvement, and objectives or goals for future work performance.

After the review, each employee will be required to sign the evaluation report simply to acknowledge that it has been presented, discussed with the supervisor, and that the employees is aware of its contents.

### **PERSONNEL FILES**

At the time of employment, a personnel file is established for each employee and will be maintained in the Human Resources office. Employees should advise PCHS of changes that should be reflected in their personnel files as soon as those changes occur. Such changes include: change in address, telephone number, number of dependents, and person(s) to notify in case of an emergency. Prompt notification of these changes is essential.

Employees have the right to inspect certain documents in their personnel file, as provided by law, in the presence of a school representative at a mutually convenient time. No copies of documents in a file may be made, with the exception of previously signed documents. Employees may submit a memorandum responding to any disputed item in the file. However, no action is required of PCHS in response to such a memorandum unless another PCHS policy requires PCHS to take action.

PCHS will restrict disclosure of an employee's personnel file to authorized individuals under legal requirements. Any request for information contained in personnel files must be directed to the Human Resources Director. Only the Executive Director or Principal or their designee are authorized to release information about current or former employees. Disclosure of personnel information to outside sources will be limited. However, PCHS will cooperate with requests from authorized law enforcement or local, state, or federal agencies conducting official investigations and as otherwise legally required.

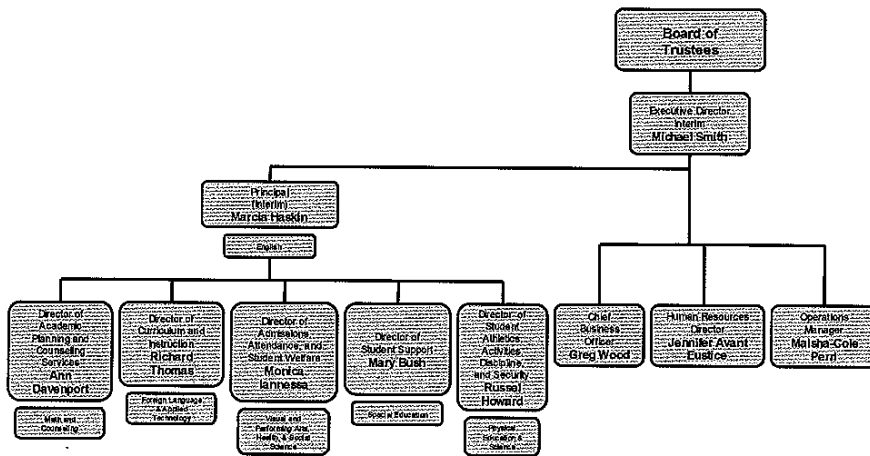


## APPENDIX A

### ORGANIZATIONAL STRUCTURE

(Effective July 1, 2010)

#### PALISADES CHARTER HIGH SCHOOL EXECUTIVE MANAGEMENT 2010-2011



## **APPENDIX B**

### **PCHS SCHOOL CALENDAR 2010- 2011**

July 6 – August 2	ESY Summer School
August 23 – 26	Program Adjustment Days
August 25	Parent Orientation Meeting, 7:00 PM – Mercer Hall
August 27, 30	New student registration
September 3	Admissions Day
September 6	Labor Day
September 10	Pupil Free Day
September 13	All classes meet – 0, 1, 3, 5, 2, 4, 6, and 7
September 18	Traveling Parent Meeting – 10:00 AM Crenshaw High School
September 21	Professional Development – 1:55 PM dismissal
September 25	AVID Parent Meeting – 9:00 AM, B101
October 5, 6	CAHSEE Testing
October 13	Back to School Night – 6:30 PM
October 15	Minimum Day*
October 26	Professional Development – 1:55 PM dismissal
November 9, 10	CAHSEE Testing
November 11	Veterans' Day School Holiday
November 22 – 24	Furlough Days
November 25 - 26	Thanksgiving Holidays
December 7	Professional Development – 1:55 PM dismissal
December 17	Minimum Day*

December 20 - January 7	Winter Break	<b>7/6/10 Update</b>
January 17	MLK Holiday	
January 25	Professional Development – 1:55 PM dismissal	
January 28	Minimum Day*	
February 1, 2 February 14	CAHSEE Testing Spring Semester – Periods 0, 1, 3, 5, 7 meet	
February 21	Presidents' Day	
March 8, 9	CAHSEE Testing	
March 15	Professional Development – 1:55 PM dismissal	
March 29	Professional Development – 1:55 PM dismissal	
April 1	Furlough Day	
April 15	Minimum Day*	
April 18- 22	Spring Break	
April 26	Professional Development – 1:55 PM dismissal	
May 2 - 13	AP Exams	
May 10, 11	CAHSEE Testing	
May 11	Minimum Day*	
May 13	Minimum Day* Senior Prom	
May 9 - 27	CST Testing	
May 30	Memorial Day Holiday	
June 2	Open House	
June 3	Minimum Day	

June 23                      Graduation – 6:30 PM

June 24                      All classes meet-minimum day

## **APPENDIX C**

### **PCHS OFFICE HOLIDAYS 2010-2011**

- July 5 – Independence Day (Observed)
- August 31 – Admissions Day
- September 6 – Labor Day
- November 11 – Veterans Day
- November 25 & 26 – Thanksgiving
- December 24 – Christmas Eve
- December 31 – New Year's Eve
- January 3 – New Year's Day (Observed)
- January 17 – MLK Day
- February 21 – President's Day
- May 30 – Memorial Day

## **APPENDIX D**

### **Palisades Charter High School**

#### **CONFLICT OF INTEREST CODE**

##### **I. ADOPTION**

In compliance with the Political Reform Act of 1974, California Government Code Section 87100, et seq., the Palisades Charter High School hereby adopts this Conflict of Interest Code ("Code"), which shall apply to all governing board members, candidates for member of the governing board, and all other designated employees of Palisades Charter High School ("Charter School"), as specifically required by California Government Code Section 87300.

##### **II. DESIGNATED EMPLOYEES**

Employees of this Charter School, including governing board members and candidates, who hold positions that involve the making or participation in the making, of decisions that may foreseeably have a material effect on any financial interest, shall be designated employees. The designated positions are listed in "Exhibit A" attached to this policy and incorporated by reference herein.

##### **III. STATEMENT OF ECONOMIC INTERESTS: TIME OF FILING**

Each designated employee, including governing board members and candidates, shall file a Statement of Economic Interest ("Statement") at the time and manner prescribed below, disclosing reportable investments, interests in real property, business positions, and income required to be reported under the category or categories to which the employee's position is assigned in "Exhibit A."

An investment, interest in real property or income shall be reportable, if the business entity in

which the investment is held, the interest in real property, the business position, or source of income may foreseeably be affected materially by a decision made or participate in by the designated employee by virtue of his or her position. The specific disclosure responsibilities assigned to each position are set forth in "Exhibit B."

A. Initial Statements. All designated employees employed by the Charter School on the effective date of this Code, as originally adopted, promulgated and approved by the Charter School, shall file statements within 30 days after the effective date of this Code. Thereafter, each person in a position that becomes by an amendment to this Code a "designated employee" shall file an Initial Statement within 30 days after the effective date of the amendment.

B. Governing Board Candidates. Candidates for election to the governing board shall file statements within 5 days after the final date for filing nomination petitions.

C. Assuming Office Statements. All persons assuming designated positions after the effective date of this Code shall file statements within 30 days after assuming designated positions.

#### **CONFLICT OF INTEREST CODE**

1. Annual Statements. All designated employees shall file statements no later than **April 1.**

2. Leaving Office Statements. All persons who leave designated positions shall file statements within 30 days after leaving office.

3. Statements for Persons Who Resign 30 Days After Appointment. Persons who resign within 30 days of initial appointment are not deemed to have assumed office or left office provided they did not make or participate in the making of, or use their position to influence any decision and did not receive or become entitled to receive any form of payment as a result of their appointment. Such persons shall not file either an Assuming or Leaving Office Statement.

4. Statements Filed With the Charter School. All Statements shall be supplied by the Charter School. All Statements shall be filed with the Charter School. The Charter School's filing officer shall make and retain a copy and forward the original to the County Board of Supervisors.

#### **IV. STATEMENTS OF ECONOMIC INTERESTS: CONTENTS OF AND TIME PERIOD COVERED BY THE STATEMENTS**

A. Contents of Initial Statements. Initial Statements shall disclose any reportable investments, interests in real property and business positions held on the effective date of the Code and income received during the 12 months prior to the effective date of the Code.

B. Contents of Assuming Office Statements. Assuming Office Statements shall disclose any reportable investments, interests in real property and business positions held on the date of assuming office and income received during the prior 12 months.

C. Contents of Annual Statements. Annual Statements shall disclose any reportable investments, interest in real property, income and business positions held or received during the previous calendar year provided, however, that the period covered by an employee's first Annual Statement shall begin on the effective date of the Code or date of assuming office, whichever is later. The statement shall include any reportable investment or interest in real property, partially or wholly acquired or disposed of during the period covered by the statement, with the date of acquisition or disposal.

D. Contents of Leaving Office Statements. Leaving Office Statements shall disclose reportable investments, interest in real property, income and business positions held or received during the period between the closing date of the last statement filed and the date of leaving office. The statement shall include any reportable investment or interest in real property, partially or wholly acquired or disposed of during the period covered by the statement, with the date of acquisition or disposal.

## **V. STATEMENTS OF ECONOMIC INTERESTS: MANNER OF REPORTING**

### **A. Investment and Real Property Disclosure**

When an investment or interest in real property is required to be disclosed, the statement shall contain the following:

1. A statement of the nature of the investment or interest;
2. The name of the business entity in which each investment is held, and a general description of the business activity in which the business entity is engaged;
3. The address or other precise location of the real property; and
4. A statement whether the fair market value of the investment or interest in real property exceeds one thousand dollars (\$1,000), exceeds ten thousand dollars (\$10,000), or exceeds one hundred thousand dollars (\$100,000). This information need not be provided with respect to an interest in real property which is used principally as the residence of the filer. Reportable investments or interest in real property do include those in excess of one thousand dollars (\$1,000) held by the filer's spouse and dependent children as well as a pro rata share of any investment or interest in real property of any business entity or trust in which the filer, spouse and dependent children together own a direct, indirect or beneficial interest of 10% or more.

### **B. Personal Income Disclosure**

Personal income is required to be reported under this Code, the statement shall contain the following:

1. The name and address of each source of income aggregating \$250 or more in value or \$50 or more in value if the income was a gift, and a general description of the business activity, if any, of each source;
2. A statement whether the aggregate value of income from each source, or in the case of a loan, the highest amount owed to each source, was one thousand dollars (\$1,000) or less, greater than one thousand dollars (\$1,000), or greater than ten thousand dollars (\$10,000);
3. A description of the consideration, if any, for which the income was received;
4. In the case of a gift, the name, address and business activity of the donor and any intermediary through which the gift was made; a description of the gift; the amount or value of the gift and the date on which the gift was received; and
5. In the case of a loan, the annual interest rate and the security, if any, given for the loan.

### **C. Business Entity Income Disclosure**

When income of a business entity, including income of a sole proprietorship, is required to be reported, the statement shall contain:

1. The name, address, and a general description of the business activity; and

2. The name of every person from whom the business entity received payments if the filer's pro rata share of gross receipts from such a person was equal to or greater than ten thousand dollars (\$10,000).

**D. Business Positions Disclosure**

When reporting business positions, a designated employee shall list the name of each business entity not specified above in which he/she is a director, officer, partner, trustee, employee, or in which he/she holds any position of management; a description of the business activity in which the entity is engaged; and designated employee's position with the business entity.

**VI. DISQUALIFICATION**

No designated employee shall make, participate in making, or try to use his/her official position to influence any Charter School decision which he/she knows or has reason to know will have a reasonably foreseeable material financial effect, distinguishable from its effect on the public generally, on the official or a member of his or her immediate family or on:

A. Any business entity or real property in which the designated employee has a direct or indirect investment or interest worth one thousand dollars (\$1,000) or more.

B. Any source of income totaling two hundred fifty dollars (\$250) or more provided or promised to the designated employee within twelve months prior to the decision. (This does not include gifts or loans made at regular rates by commercial lending institutions.)

C. Any business entity in which the designated employee is the director, officer, partner, trustee, employee, or any kind of manager.

D. Any donor of gifts totaling \$250 or more in value provided or promised to the designated within twelve months prior to the decision; any intermediary or agency for such a donor.

No designated employee shall be prevented from making or participating in any decision to the extent that his/her participation is legally required for the decision to be made. (The need to break a tie vote does not make the designated employee's participation legally required.)

During their term on the Board, employee Board members are prohibited from participation on or assisting with that employee's bargaining unit negotiations team. Employee Board members are prohibited from participating in any closed session Board discussions related to their or any other unit's labor negotiations.

**VII. MANNER OF DISQUALIFICATION**

**A. Non-Governing Board Member Designated Employees**

When a non-Governing Board member designated employee determines that he/she should not make a decision because of a disqualifying interest, he/she should submit a written disclosure of the disqualifying interest to his/her immediate supervisor. The supervisor shall immediately reassign the matter to another employee and shall forward the disclosure notice to the Charter School Director, who shall record the employee's disqualification. In the case of a designated employee who is head of an agency, this determination and disclosure shall be made in writing to his/her appointing authority.

**B. Governing Board Member Designated Employees**

Governing Board members shall disclose a disqualifying interest at the meeting during which consideration of the decision takes place. This disclosure shall be made part of the Board's official record. The Board member shall then refrain from participating in the decision in any way (i.e., the Board member with the disqualifying interest shall refrain from voting on the matter

and shall leave the room during Board discussion and when the final vote is taken) **and** comply with any applicable provisions of the Charter School bylaws (see, Article IX (Contracts With Directors)).

### **VIII. DEFINITION OF TERMS**

As applicable to a charter school, the definitions contained in the Political Reform Act of 1974, the regulations of the Fair Political Practices Commission, specifically California Code of Regulations Section 18730, and any amendments or modifications to the Act and regulations are incorporated by reference to this Code.

### **EXHIBIT A**

#### **Designated Positions**

I. Persons occupying the following positions, as applicable, are designated employees and must disclose financial interests in all categories defined in "Exhibit B" (i.e. categories 1, 2, and 3).

- A. Members of the Governing Board
- B. Candidates for Member of the Governing Board
- C. Principal of Charter School
- D. Assistant Principals
- E. Chief Business Officer
- F. Director Personnel Services
- G. Assistant Director of Personnel Services
- H. Consultants<sup>1</sup>
- I. Other Employees<sup>2</sup>

II. Persons occupying the following positions are designated employees and must disclose financial interests defined in Category 1 of "Exhibit B."

- A. Purchasing Manager
- B. Assistant Business Officer
- C. Other Employees<sup>3</sup>

III. Persons occupying the following positions are designated employees and must disclose financial interests defined in Categories 2 and 3 of "Exhibit B."

- A. Information Systems Technician
- B. Contractor
- C. Other Employees<sup>4</sup>

<sup>1</sup> The Director may determine, in writing, that a particular consultant, although a "designated position," is hired to perform a range of duties that is limited in scope and thus not required to fully comply with the disclosure requirements in this section. Such written determination shall include a description of the consultant's duties and, based upon that description, a statement of the extent of disclosure requirements. The Director's determination is a public record and shall be retained for public inspection in the same manner and location of interest code.

<sup>2</sup> "Other Employees" include any employee occupying a position that requires the employee to make a governmental decision that foreseeably and materially affects a personal financial interest, source of income, or a business position in a business entity.

<sup>3</sup> "Other Employees" include any employee with authority to make purchases that may foreseeably and materially affect an investment and/or business position in business entities or who are in a position to influence a governmental decision that may foreseeably and materially affect an investment and/or business position in a business entity.

<sup>4</sup> "Other Employees" include employees with authority to make purchases that may foreseeably and materially effect investments and business positions in business entities which provide services, supplies, materials, or

### **EXHIBIT B**



## Disclosure Categories

### Category 1 Reporting:

A. Interest in real property which is located in whole or in part either (1) within the boundaries of the District, or (2) within two miles of the boundaries of the District, including any leasehold, beneficial or ownership interests or option to acquire such interest in real property, if the fair market value of the interest is greater than \$1,000. (Interests in real property of an individual include a business entity's share of interest in real property of any business entity or trust in which the designated employee or his or her spouse owns, directly, indirectly, or beneficially, a ten percent interest or greater.)

B. Investments in or income from persons or business entities which are contractors or subcontractors

which are or have been within the previous two-year period engaged in the performance of building construction or design within the District.

C. Investments in or income from persons or business entities engaged in the acquisition or disposal of real property within the jurisdiction.

(Investment includes any financial interest in or security issued by a business entity, including but not limited to common stock, preferred stock, rights, warrants, options, debt instruments and any partnership interest or other ownership interests.)

(Investments of any individual include a pro rata share of investments of any business entity or trust in which the designated employee or his or her spouse owns, directly, indirectly or beneficially, a ten percent interest or greater.)

(Investment does not include a time or demand deposit in a financial institution, shares in a credit union, any insurance policy, or any bond or other debt instrument issued by any government or government agency.)

(No investment or interest in real property is reportable unless its fair market value exceeds \$1,000. No source of income is reportable unless the income received by or promised to the public official aggregates \$250 or more in value or \$50 or more in value if the income was a gift during the preceding 12-month reporting period.)

### Category 2 Reporting:

A. Investments in or income from business entities which manufacture or sell supplies, equipment in which the employee has authority to purchase. books, machinery or equipment of the type utilized by the department for which the designated employee is Manager or Director. Investments include interests described in Category 1.

### Category 3 Reporting:

A. Investments in or income from business entities which are contractors or sub-contractors engaged in the performance of work or services of the type utilized by the department for which the designated employee is Manager or Director. Investments include the interests described in Category 1.