

Plaza School District
7322 County Road 24
Orland, CA 95963
BOARD OF TRUSTEES
Regular Board Meeting
January 19th, 2023
3:00PM
Agenda

- I. Call to Order
- II. Pledge of Allegiance
- III. Members Present
- IV. Comments: Non Agenda Items—The Board Clerk will allow three minutes for speakers to address the appropriate matters. Speakers will identify themselves when acknowledged by the Clerk.
- V. Comments: Agenda Items Only—Any person wishing to address the Board will identify themselves, the agenda item they are speaking about, and limit remarks to three minutes.
- VI. Correspondence
 - A. January 6th, 2023 Letter from Tony Thurmond, State Superintendent of Public Instruction Recognizing Plaza as a California Distinguished School
- VII. Superintendent Report/Information
 - A. The Plaza Promise
 - 1. Community Engagement February 2nd, 2023
 - 2. Food Service Program
 - B. January Pirates Post
 - C. Plaza Community Club
 - D. Facilities
 - 1. New Construction and Modernization
 - E. 2022-23 Enrollment
 - F. School Site Council
 - G. Personnel
 - H. County of Glenn Elections Department: Form 700 Filings
 - I. Classified Employee Summer Assistance Program
 - J. 1st Read Board Policy 5141.21 Administering Medication and Monitoring Health Conditions
- VIII. Action
 - A. Old Business
 - B. New Business
 - 1. Consent Agenda: Routine matters that can be approved with one motion
 - a. Approve the Minutes of the December 9th, 2022 Board Meeting
 - b. Approve Warrant Registers: December 2nd, 2022 – January 13th, 2023
 - c. Approve Budget Transfers— None
 - 2. Approve Up to \$8,400 Per Year Stipend in Lieu of Health and Welfare Benefits for Eligible Classified Retirees
 - 3. Approve 2022-23 School Accountability Report Card
 - 4. Approve 2022-23 Safe School Plan
 - 5. Accept Letter of Resignation from Employee #1380

**Plaza School District
7322 County Road 24
Orland, CA 95963
BOARD OF TRUSTEES
Regular Board Meeting
January 19th, 2023
3:00PM
Agenda**

- 6. Approve and Certification of 1st Interim Report as of October 31st, 2022**
- IX. Adjournment – Next Regularly Scheduled Meeting Thursday, March 16th, 2023 @ 3PM**



Patrick Conklin <pconklin@plazaschool.org>

2023 California Distinguished School

1 message

Superintendent Thurmond <Superintendent@cde.ca.gov>
To: "pconklin@plazaschool.org" <pconklin@plazaschool.org>

Fri, Jan 6, 2023 at 2:14 PM

**CALIFORNIA DEPARTMENT
OF EDUCATION**

1430 N STREET, SACRAMENTO, CA 95814-5901 • 916-319-0800 • WWW.CDE.CA.GOV

TONY THURMOND
STATE SUPERINTENDENT OF
PUBLIC INSTRUCTION

January 6, 2023

Dear Principal/Superintendent Patrick Conklin:

Congratulations! is being recognized as a 2023 California Distinguished School. This is an exceptional achievement. The California Distinguished Schools program recognizes schools for their excellent work in one of two categories: closing the achievement gap and achieving exceptional student performance. To select California Distinguished Schools, the California Department of Education (CDE) uses multiple measures to identify eligible schools based on their performance on the state indicators as specified on the California School Dashboard (Dashboard). Specifically, the 356 elementary schools who are being recognized this year were selected by analyzing data reported through the 2022 Dashboard, including assessment results, chronic absenteeism, suspension rates, and socioeconomic data. Information regarding the 2022 Dashboard is provided on the CDE California School Dashboard and System of Support web page at <https://www.cde.ca.gov/ta/ac/cm/index.asp>.

As a Distinguished School honoree, you are invited to attend the California School Recognition Program (CSRP) Awards Ceremony on Thursday, February 16, 2023, at the Disneyland Hotel in Anaheim, California. Presented by the CDE, the ceremony is a celebratory day to recognize your school's outstanding achievements.

In addition to honoring the 2023 California Distinguished Schools at the ceremony, we will also honor the 2023 California Exemplary Arts Education Schools, 2022 National Blue Ribbon Schools, and 2022 Civic Learning Award Schools.

The deadline to register for the Awards Ceremony is Wednesday, February 1, 2023. The hotel reservations cut off for the room block is Monday, January 30, 2023. Information about the Awards Ceremony, including registration and hotel reservations, is available on the CDE CSRP Registration web page at <https://CADeptEDAWards.regfox.com/2023-california-school-recognition-program-awards-ceremony>

You can view the news release announcing this year's Distinguished Schools on the CDE News Releases Year 2023 web page at <https://www.cde.ca.gov/nr/ne/yr23/yr23rel01.asp>.

If you have any questions regarding the event, please contact the CDE Awards Team by email at awards@cde.ca.gov.

I commend you on your success and look forward to seeing you in Anaheim next month.

Sincerely,

Tony Thurmond
State Superintendent of Public Instruction

TT:df



~Breakfast Menu~

Monday	Tuesday	Wednesday	Thursday	Friday
French Toast Sticks Or Cereal	Bagel & Cream Cheese OR Cereal	PIRATE PIZZA! Or Cereal	Pancake On A Stick OR Cereal	Cook's Choice

~Lunch Menu~

Monday	Tuesday	Wednesday	Thursday	Friday
9 Chicken Nuggets Oven Fries Fruit OR Yogurt & Granola	10 Toasted Ham & Cheese Croissants Carrot Sticks Chips Fruit OR Yogurt & Granola	11 Spaghetti Broccoli Garlic Toast Fruit OR Yogurt & Granola	12 Chicken on a Bun Baked Tater Tots Fruit OR Yogurt & Granola	13 Pizza Green Salad Fruit OR Yogurt & Granola
16 No School	17 Nacho Refried Beans Salsa OR Yogurt & Granola	18 Hamburger & Gravy Mashed Potatoes Fruit OR Yogurt & Granola	19 Grilled Cheese Sandwich Green Beans Fruit OR Yogurt & Granola	20 Pizza Green salad Fruit OR Yogurt & Granola
23 Corndog Baked Tater Tots Fruit OR Yogurt & Granola	24 Taco Tuesday! Beans Fruit Or Yogurt & Granola	25*MINIMUM DAY* Orange Chicken Rice Broccoli Fruit OR Yogurt & Granola	26 Meatball Marinara Sub Corn Fruit OR Yogurt & Granola	27 Pizza Green Salad Fruit OR Yogurt & Granola
30 Chicken Gravy Over Rice Fruit Green Beans OR Yogurt & Granola	31 Quesadilla Chips & Salsa Fruit OR Yogurt & Granola	01 Sloppy Joes Fries Fruit OR Yogurt & Granola	02 Mac & Cheese Corn Fruit OR Yogurt & Granola	03 Pizza Green Salad Fruit OR Yogurt & Granola

Variety milk and fruits served daily at Breakfast & Lunch

Menus are subject to change.

Salad bar available Mon-Thurs. Tossed salad every Friday.

Plaza Elementary is an Equal Opportunity Provider

THE PIRATES POST

December 22, 2022

HELLO
January

Check out our website at www.Plazaschool.org for Information, Events and Dates!

Dates to Remember:

Dec 26-Jan 6	No School: Winter Break
Jan 13	7th-8th Basketball @ Orland Rec Center
Jan 16	No School: Dr. Martin Luther King Jr. Day
Jan 19	Plaza School Board Mtg @ 3PM PCC Mtg @ 6PM
Jan 20	6th-8th Grade Dance @ Plaza School 5:30-8:30PM
Jan 25	Minimum Day Dismissal @ 12:45 for Teacher Pro Development
Jan 27	7th-8th Basketball @ Orland Rec Center
Feb 2	Plaza School Community Game Night 5:30-6:30PM
Feb 3	7th-8th Basketball @ Los Molinos
Feb 16	School Site Council and Long Term Strategic Planning Meeting @ 3PM PCC Mtg @ Orland Round Table @ 6PM
Feb 20-24	No School: Winter Break
Feb 27	2023-24 Kindergarten Round Up (Appointments Required)

School Construction News!! The Good News is We May Have a Long Summer. The Bad News is the Year Would End Later

There is a very good chance state funding will be allocated to Plaza School this summer for us to begin one or both of our long awaited construction projects. There are two projects that we have approved. One phase is a new construction project where a gym will be built and three additional portable classrooms installed. The other phase is a modernization project where the main building will be updated, including bathrooms, as well as site work to make campus more ADA compliant.

It is almost certain that new construction funding will be in place by this summer. However, we are hopeful that modernization funding will happen at the same time. If modernization funding is received by this summer, then our 2023-24 calendar will reflect a later start day (September 11th, 2023), less breaks during the year, and ending the school year on June 19th, 2024. While inconvenient, it is necessary so contractors can work on the main building during the summer.

The Plaza School board approved two versions of a 2023-24 calendar, both of which are on our website (www.plazaschool.org) If modernization funding isn't received this summer, therefore construction on the main building does not occur throughout the summer of 2023, Version 1 is a traditional calendar with no changes compared to previous years. Version 2.1 reflects construction starting in late May, therefore a late start to the school year.

If you have questions or concerns, or would like to learn more about these projects, please reach out to Mr. Conklin

Welcome New Plaza Staff Members

Please take a moment to introduce yourself to our new Cafeteria Manger/Cook, Jacklyn Orsua, and our new custodian, Alberto Linares. Ms. Orsua has been a Plaza School community member for many years as a Plaza parent. She has many years of experience working in food service. We look forward to a new and improved menu soon...including a salad bar! Mr. Linares will replace Mr. Fissori, who is retiring in February. He worked as Lake School's custodian before coming to Plaza.

We also have a new hire who has actually been serving our students for over two years in the Learning Center. Starting this month Mrs. Randles officially became a Plaza staff member. She started out as an extenuating circumstances substitute to help limit the learning loss students experienced during school closures. However, her role has been invaluable and the District is committed to ensuring students continue to grow academically.

Welcome to the Plaza family Mrs. Randles, Mrs. Orsua, and Mr. Linares!

The Plaza Promise -

Plaza School Community Engagement Hosted by Plaza Teachers!

The Plaza teachers would like to invite the school community to an evening of family fun on Thursday, February 2nd from 5:30-6:30PM. Each classroom will have games and activities for families to enjoy while visiting classrooms throughout campus.

More information will be out after break.

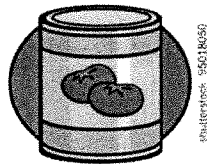


shutterstock.com · 1710810646

Canned Food Drive

The results are in...602 items collected for the Orland Pantry canned food drive! Awesome job Plaza students.

Congratulations to 5th grade for collecting 123 products, beating out Kindergarten by just one item! **Special thank you to Mrs. Henning and our Student Leadership/Club Live team** for all their hard work promoting this amazing service project, as well as counting and collecting all the items. Thanks Plaza School community for your donations.



Student Recognition

Congratulations to Belle F. in Mrs. Crane's 3rd grade class. Belle's story was chosen as the Imagine This Story Writing Contest winner for our region. Students write narratives to develop real or imagined experiences or events based on accurate information about California agriculture. On January 1st, one of the seven 3rd grade regional winners will be selected for publication and invited to the State Capitol in the spring.

Orland Unified School District Interdistrict Transfer Students

Please remember that December 1 through February 15 OUSD will begin accepting inter district transfer requests for the 2023-24 school year. Failure to submit the transfer request during the period will result in the expectation that the child shall attend their school of residence until a determination is made. This means your child would be expected to attend OUSD. Please go to the OUSD office to initiate the transfer request before February.

November 17th, 2022

Meeting called to order -Colleen Cecil, President 6:11 pm

Approval of Minutes from October 20 - Mandy Edson, Secretary - M/Kelly Henning 2nd/
Chera Molleson

Financial Report- Kadie Salazar, Treasurer -M/Chera, 2nd/ Gerold Rice

Old Business

- 1.) Carnival recap: expenses \$2,270.03 income \$4,019.73 Total Profit \$1,749.70

Discussed Improvements/changes for 2023:

Tent for cake walk and a chairperson, sponsors, PA system/music, schedule posted, petting zoo, haunted cafeteria, 2 tables for fish game (it took too long) and a ticket booth for an adult (the one we have is for a kid) with square available. **Fall Carnival Octt. 28th, 2023**

- 2.)Stephens Farmhouse Jam- raised \$2,345.00

- 3.) Roundtable Night- waited until end of the meeting to get total

New Business

- 1.) Upcoming Spring Fundraisers

Roundtable Night in March

Coin drive the week of Feb. 14th

Drive thru dinner and raffle

Spring color run

- 2.) Other items not on the agenda? Kadie requested an upgrade to Quickbooks Online. Cost would be \$15 per month- m/ Kristen 2nd/ Chera Molleson

Meeting Adjourned 6:45 pm

Next meeting January 19, 2023

November Rec Report 2022

Community Club Checking
1/12/2023

Page 1

Reconciliation Summary

BANK STATEMENT -- CLEARED TRANSACTIONS:

Previous Balance:			12,367.23
Checks and Payments	9	Items	-5,244.07
Deposits and Other Credits	4	Items	9,333.62
Service Charge	0	Items	0.00
Interest Earned	0	Items	0.00
Ending Balance of Bank Statement:			16,456.78

YOUR RECORDS -- UNCLEARED TRANSACTIONS:

Cleared Balance:			16,456.78
Checks and Payments	2	Items	-290.74
Deposits and Other Credits	0	Items	0.00
Register Balance as of 1/12/2023:			16,166.04
Checks and Payments	0	Items	0.00
Deposits and Other Credits	0	Items	0.00
Register Ending Balance:			16,166.04

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November Rec Report 2022

Community Club Checking
1/12/2023

Page 2

Uncleared Transaction Detail up to 1/12/2023

Date	Num	Payee	Memo	Category	Clr Amount
Uncleared Checks and Payments					
8/18/...	2972	Mandy Edson	Meeting Dinne...	Meeting Dinners	-200.74
11/2/...	2982	Junior Jumpers	Jump House	Canival Expense	-90.00
Total Uncleared Checks and Payments				2 Items	-290.74

Uncleared Deposits and Other Credits

December Rec Report

Community Club Checking
1/12/2023

Page 1

Reconciliation Summary

BANK STATEMENT -- CLEARED TRANSACTIONS:

Previous Balance:			16,456.78
Checks and Payments	2	Items	-109.45
Deposits and Other Credits	0	Items	0.00
Service Charge	0	Items	0.00
Interest Earned	0	Items	0.00
Ending Balance of Bank Statement:			16,347.33

YOUR RECORDS -- UNCLEARED TRANSACTIONS:

Cleared Balance:			16,347.33
Checks and Payments	1	Item	-200.74
Deposits and Other Credits	0	Items	0.00
Register Balance as of 1/12/2023:			16,146.59
Checks and Payments	0	Items	0.00
Deposits and Other Credits	0	Items	0.00
Register Ending Balance:			16,146.59

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December Rec Report

Community Club Checking
1/12/2023

Page 2

Uncleared Transaction Detail up to 1/12/2023

Date	Num	Payee	Memo	Category	Clr Amount
Uncleared Checks and Payments					
8/18/...	2972	Mandy Edson	Meeting Dinne...	Meeting Dinners	-200.74
Total Uncleared Checks and Payments				1 Item	-200.74

Uncleared Deposits and Other Credits

Total Uncleared Deposits and Other Cr...	0 Items	0.00
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Total Uncleared Transactions	1 Item	-200.74
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UMPQUA BANK

November 30, 2022 Page: 1 of 3



PLAZA COMMUNITY CLUB
7322 COUNTY RD 24
ORLAND CA 95963-9777

UB

Customer Service:
1-866-486-7782

Last statement: October 31, 2022
This statement: November 30, 2022

Please be aware that items may be presented for payment multiple times when your account does not contain sufficient funds to pay the item(s). We may charge you a fee each time an item is presented and you do not have sufficient funds in your account to pay the item. For services to help you manage your account, visit www.umpquabank.com/globalassets/media/documents/overdraft_disclosure_for_business_accounts.pdf

COMMUNITY BUSINESS CHECKING

Account number	2079186867	Beginning balance	\$12,367.23
Low balance	\$12,367.23	Deposits/Additions	\$9,333.62
Average balance	\$19,916.79	Withdrawals/Subtractions	\$5,244.07
Interest earned	\$0.00	Ending balance	\$16,456.78

Deposits/Additions

<u>Date</u>	<u>Description</u>	<u>Additions</u>
11-02	Deposit	5,368.00
11-02	Deposit	3,958.00
Total Additions		\$9,326.00

ACH and Electronic Deposits/Additions

<u>Date</u>	<u>Description</u>	<u>Additions</u>
11-21	ACH Credit Amznrouw2qkt Amazonsmil 29osr5pdo635jv0 Payments.Amazon.Co M ID#29osr5pdo635jV0	7.62
Total ACH and Electronic Deposits/Additions		\$7.62

Card Transactions/Withdrawals

<u>Date</u>	<u>Description</u>	<u>Subtractions</u>
11-18	POS Purchase Terminal 01763439Round Table Pizza 953/ 530-87222 CA XXXXXXXXXXXX7534	121.68
11-18	POS Purchase Terminal 01788885Round Table Pizza 953/ Orland CA XXXXXXXXXXXX7534	31.79
Total Card Transactions/Withdrawals		\$153.47

Daily Balances

<u>Date</u>	<u>Amount</u>	<u>Date</u>	<u>Amount</u>	<u>Date</u>	<u>Amount</u>
10-31	12,367.23	11-08	20,793.07	11-29	16,528.40
11-02	21,693.23	11-18	19,535.78	11-30	16,456.78
11-07	20,799.80	11-21	19,543.40		

Overdraft Fee Summary

	Total For This Period	Total Year-to-Date
Total Overdraft Fees	\$0.00	\$0.00
Total Returned Item Fees	\$0.00	\$0.00

Checks

<u>Check #</u>	<u>Amount</u>	<u>Date</u>	<u>Check #</u>	<u>Amount</u>	<u>Date</u>
2975	\$71.62	11-30	2985	\$315.57	11-18
*2979	\$6.73	11-08	2986	\$788.25	11-18
*2981	\$489.51	11-07	2987	\$3,015.00	11-29
*2984	\$403.92	11-07			

(* Skip in check sequence, R-Check has been returned,+ Electronified check))

Total Checks paid: 7 for **-\$5,090.60**

PLAZA COMMUNITY CLUB
7322 COUNTY RD. 24
ORLANDO, CA 96963-9777

DATE 11/15/22 2975

PAY TO THE ORDER OF April Bailey \$ 71.62
Seventy one and 62/100

FOR Special Dairy Supplies Kristen Cushman

Umpqua Bank (866) 486-7782

⑆ 23205054⑆ 2079186867⑆ 2975

Check # 2975, Posted 11-30-22, Amount \$71.62

PLAZA COMMUNITY CLUB
7322 COUNTY RD. 24
ORLANDO, CA 96963-9777

DATE 11/16/22 2985

PAY TO THE ORDER OF John Lovell \$ 315.57
Three hundred and fifteen 57/100

FOR 6th Class Funds Kadi Salazar

Umpqua Bank (866) 486-7782

⑆ 23205054⑆ 2079186867⑆ 2985

Check # 2985, Posted 11-18-22, Amount \$315.57

PLAZA COMMUNITY CLUB
7322 COUNTY RD. 24
ORLANDO, CA 96963-9777

DATE 10/28/22 2979

PAY TO THE ORDER OF Kadi Salazar \$ 6.73
Six and 73/100

FOR Dollar Tree Kinder shirt hats Kadi Salazar

Umpqua Bank (866) 486-7782

⑆ 23205054⑆ 2079186867⑆ 2979

Check # 2979, Posted 11-08-22, Amount \$6.73

PLAZA COMMUNITY CLUB
7322 COUNTY RD. 24
ORLANDO, CA 96963-9777

DATE 11/16/22 2986

PAY TO THE ORDER OF John Lovell \$ 788.25
Seven hundred and eighty eight 25/100

FOR Sports Fund Kadi Salazar

Umpqua Bank (866) 486-7782

⑆ 23205054⑆ 2079186867⑆ 2986

Check # 2986, Posted 11-18-22, Amount \$788.25

PLAZA COMMUNITY CLUB
7322 COUNTY RD. 24
ORLANDO, CA 96963-9777

DATE 11/2/22 2981

PAY TO THE ORDER OF Kristen Cushman \$ 489.51
four hundred and eighty nine 51/100

FOR One Stop/Walco Costco/Carnival Kadi Salazar

Umpqua Bank (866) 486-7782

⑆ 23205054⑆ 2079186867⑆ 2981

Check # 2981, Posted 11-07-22, Amount \$489.51

PLAZA COMMUNITY CLUB
7322 COUNTY RD. 24
ORLANDO, CA 96963-9777

DATE 11/16/22 2987

PAY TO THE ORDER OF Stephans Farmhouse \$ 3015.00
three thousand fifteen 00/100

FOR Plaza School Jam Fundraiser 2022 Kadi Salazar

Umpqua Bank (866) 486-7782

⑆ 23205054⑆ 2079186867⑆ 2987

Check # 2987, Posted 11-29-22, Amount \$3,015.00

PLAZA COMMUNITY CLUB
7322 COUNTY RD. 24
ORLANDO, CA 96963-9777

DATE 11/21/22 2984

PAY TO THE ORDER OF Kristen Cushman \$ 403.92
four hundred and three 92/100

FOR Fall Carnival Expenses Kadi Salazar

Umpqua Bank (866) 486-7782

⑆ 23205054⑆ 2079186867⑆ 2984

Check # 2984, Posted 11-07-22, Amount \$403.92



UMPQUA BANK

December 31, 2022 Page: 1 of 3

PLAZA COMMUNITY CLUB UB
7322 COUNTY RD 24
ORLAND CA 95963-9777

Customer Service:
1-866-486-7782

Last statement: November 30, 2022
This statement: December 31, 2022

Please be aware that items may be presented for payment multiple times when your account does not contain sufficient funds to pay the item(s). We may charge you a fee each time an item is presented and you do not have sufficient funds in your account to pay the item. For services to help you manage your account, visit www.umpquabank.com/globalassets/media/documents/overdraft_disclosure_for_business_accounts.pdf

COMMUNITY BUSINESS CHECKING

Account number	2079186867	Beginning balance	\$16,456.78
Low balance	\$16,347.33	Deposits/Additions	\$0.00
Average balance	\$16,347.33	Withdrawals/Subtractions	\$109.45
Interest earned	\$0.00	Ending balance	\$16,347.33

Other Withdrawals/Subtractions

Date	Description	Subtractions
12-01	Debit Memo	19.45
Total Other Withdrawals/Subtractions		\$19.45

Daily Balances

Date	Amount	Date	Amount	Date	Amount
11-30	16,456.78	12-01	16,347.33	12-31	16,347.33

Overdraft Fee Summary

	Total For This Period	Total Year-to-Date
Total Overdraft Fees	\$0.00	\$0.00
Total Returned Item Fees	\$0.00	\$0.00

Checks

<u>Check #</u>	<u>Amount</u>	<u>Date</u>
2982	\$90.00	12-01

(* Skip in check sequence, R-Check has been returned,+ Electronified check))

Total Checks paid: 1 for **-\$90.00**

PLAZA COMMUNITY CLUB
7322 COUNTY RD. 34
ORLAND, CA 95963-8777

DATE 11/21/22 2982

PAY TO THE ORDER OF Jr. Jumpers \$ 90-
ninten # colico

UMPQUA BANK (866) 446-7787

FOR Plaza School carnival Kadii Salazar

⑆ 1 2 3 205054⑆ 2079186867⑆ 2982

Check # 2982, Posted 12-01-22, Amount \$90.00

REQUEST FOR PROPOSALS ("RFP")
Construction Services for Lease-Leaseback Project Delivery
Plaza Elementary School District

Responses must be received on Monday, February 13, 2023, no later than 2:00 p.m.

Plaza Elementary School District ("District") invites proposals from firms, partnerships, corporations, associations, persons, or professional organizations to enter into an agreement with the District to construct improvements and perform a project as more particularly described in **Exhibit A** ("Project") pursuant to Education Code section 17406 et seq.

This Project shall be accomplished by one contractor through one site lease and facilities lease, with two Guaranteed Maximum Price ("GMP") amendments for Phase 1 and Phase 2:

- **Phase 1: Plaza Elementary School Modernization ("Modernization Phase"):** The Modernization Phase has already been approved by the Division of the State Architect ("DSA"). The District is requesting that contractors review the deadlines and plans and specifications attached to the RFP and provide price proposals. The District will use the price proposal to develop a contract for completion of the Modernization Phase within the time frames stated in **Exhibit A**.
- **Phase 2: Plaza Elementary School Additions ("Additions Phase"):** The Additions Phase is currently under DSA review. The District is requesting that contractors review the deadlines and unapproved plans attached to the RFP and provide estimated price proposals for the Additions Phase. The estimated price will be finalized once the Contract Documents are approved by the DSA. The District will use the price proposal to develop a contract for completion of the Additions Phase within the time frames stated in **Exhibit A**.

The District anticipates that the LLB contract will need to be amended each time the District finalizes the plans for a portion of the work and the contractor provides an associated price proposal. With each such amendment, the scope (e.g., DSA approved package number), time for completion, and price for each portion of the work will be finalized and included in the LLB contract. The District expressly reserves the right, in its sole discretion, to exclude any portion of the work from the LLB contract.

Interested firms or persons must submit their proposals, **which shall not exceed twenty-five (25) single-sided pages**, as described below, with one (1) electronic copy and three (3) hard copies of requested materials to:

Plaza Elementary School District
7322 County Road 24
Orland, CA 95963
Attention: Patrick Conklin, Superintendent/Principal
Email: pconklin@plazaschool.org

The Site and Facilities Lease documents that the successful contractor will be expected to execute shall be provided with this RFP in draft versions as **Exhibit D**. The successful contractor may provide comments on the Site and Facilities Lease documents after the Notice of Intent of Award, but the District may, in its sole discretion, determine whether to accept any such changes.

A mandatory site walk will be held on **Tuesday, January 17, 2023 at 11:00 a.m.** at 7322 County Road 24, Orland, CA 95963. **Proposers must attend the mandatory site walk.** Proposals from firms who did not attend the conference will be rejected.

It is critical that proposers ask any questions about the plans and specifications and/or unapproved plans prior to submitting a proposal. Questions regarding this RFP must be directed to Patrick Conklin at

pconklin@plazaschool.org by Monday, January 23, 2023 no later than 2:00 p.m., with a copy to jhuang@rainforthgrau.com.

This RFP is neither a formal request for bids, nor an offer by the District to contract with any party responding to this RFP. The District reserves the right to reject any and all responses. The District also reserves the right to amend this RFP as necessary. All materials submitted to the District in response to this RFP shall remain property of the District.

- RFP advertisement:
 - First notice: Wednesday, January 4, 2023
 - Second notice: Wednesday, January 11, 2023
 - Trade journal publication: Wednesday, January 4, 2023
- Mandatory site walk: Tuesday, January 17, 2023 at 11:00 a.m.
- Submit all questions regarding RFP: Monday, January 23, 2023 no later than 2:00 p.m.
- Prequalification applications due: Monday, January 30, 2023
- RFP responses due: Monday, February 13, 2023 no later than 2:00 p.m.
- Anticipated Interviews (if any): Tuesday, February 21, 2023 – Friday, February 24, 2023
- Anticipated Board meeting date for approval of LLB contract: March 16, 2023

The District invites qualified firms to submit proposals with respect to the Project described herein.

In general, the firm(s) selected as a result of this process ("Firm") will provide a proposal to the District to perform the Project and thereafter work cooperatively with the District Board, staff and consultants, the architect of record and design team, and the Project inspectors, to facilitate the timely completion of the Project.

The District wishes to retain a Firm that has the financial strength, management, and expertise to assist the District with delivering the Project within the proposed schedule. The District reserves the right to choose individual members of the Firm or the entire Firm.

A. Description of Project

The Project for which the District is seeking responses will include the District's Project as more specifically described in **Exhibit A**, attached hereto.

B. Preconstruction Services

1. Costs of Preconstruction Services:

District anticipates minor preconstruction services, and has capped these services at \$20,000 for the Modernization Phase and at \$20,000 for the Additions Phase, as identified in **Exhibit B and Exhibit C**. This amount may later be increased by mutual agreement of the parties, if appropriate.

2. Description of Preconstruction Services:

- Firm shall work with District staff and architect to develop an overall construction budget and construction schedule.
- Firm shall assist the District with reviewing plans and specifications for the Project to be constructed.
- Firm shall assist the District by providing detailed and on-going evaluations of the Project, including the plans and specifications (the "Plans and Specifications"), detailed construction budget cost projections, Project schedule and phasing requirements, analysis of the District's overall Project budget, Project constructability reviews of Architect's work, leadership, and

participation in youth and community involvement efforts, and implementation of community benefits and local work force options and opportunities. Such evaluations shall include alternative approaches to design, development, and construction of the Project.

- Firm shall attend regular meetings with the District, and any other applicable consultants of the District, as required.
- Firm shall assist with considering operating or maintenance costs with respect to selecting systems (mechanical, electrical, lighting, bell/intercom, etc.) for the Project. Firm will provide life cycle costing analyses as requested by District.
- Firm shall perform a detailed analysis of both the preliminary and the final Plans and Specifications and provide the District with value engineering and recommendations regarding scope and budget of the Project, suggested value engineering items, long lead purchases, and a plan for revising the Plans and Specifications to the extent necessary to achieve the District's goals and objectives, including Project completion dates.
- Firm shall assist the District in obtaining all local and state licenses, permits, requirements, and approvals including, but not limited to, approval from the Division of the State Architect ("DSA"), approval from the Office of Public School Construction, and compliance with requirements of the California Environmental Quality Act.
- Firm shall assist the District in obtaining all necessary licenses, approvals and authorizations required for construction of the well with the County Health Department, State Agencies and other regulatory entities.
- Firm shall work with District's legal counsel to prepare necessary agreements for completion of the Project.
- Firm shall provide a construction price estimate upon contract execution, and a subsequent price estimate upon request by the District as plans approach DSA approval, prior to GMP finalization.
- During the Construction Document phase of the design the contractor shall coordinate the work of the design build subcontractors.
- Firm shall negotiate with the District a guaranteed maximum price for the construction of the Project which shall become the basis for the lease agreements.
- Firm shall perform any other services ordered by the District to facilitate the timely and cost effective completion of the Project.

C. Agreement Structure and Key Elements of the Instrument to Be Awarded

The District will lease the applicable site to the contractor and require the contractor to construct improvements on the site. The lease may include a financing component for the Project by extension of the term of the lease beyond the duration of the construction for a period of one (1) year.

The District will have the ability to occupy the site during the financing period, and a portion of the construction cost due to the contractor will be paid as lease payments during the financing period. The agreement will permit the District to pay the financed amounts early to avoid any financing charges. Any charges for such financing shall be built-in to contractor's price proposal submitted in response to this RFP.

D. Prequalification Requirement

In order to be awarded a contract for the Project or any portion thereof, the successful entity must be prequalified pursuant to the District's policies and procedures. In addition, any mechanical, electrical, or plumbing subcontractors must be prequalified pursuant to the District's policies and procedures.

Proposers must submit prequalification applications **not later** than ten (10) working days prior to the RFP response deadline. However, proposers are encouraged to submit prequalification packets as soon as possible, as a submission prior to such deadline will not guarantee timely prequalification. It is the responsibility of each proposer to ensure they are prequalified **not less than** five (5) working days prior to the deadline for RFP submissions. The same timelines will apply to prequalification of mechanical, electrical, or plumbing subcontractors.

Firms submitting responses **must be prequalified** pursuant to Education Code section 17406 and Public Contract Code section 20111.6. Prequalification takes place **in advance of submitting a response**, and prequalification applications are available from Patrick Conklin at pconklin@plazaschool.org. Any electrical, mechanical, and plumbing subcontractors shall be subject to the same prequalification requirements.

E. GMP Development and Transparency

The contractor will provide the District access to objectively verifiable information for all of contractor's costs, including but not necessarily limited to subcontractor bids, value engineering back-up, contingency breakdown and tracking documents, general conditions breakdown and tracking documents, and contractor fees.

F. Description of Format that Proposals Shall Follow and Elements the Proposals Shall Contain

Proposals must be concise, well-organized, and consecutively numbered on each page. Proposals shall be no longer than twenty-five (25) single-sided pages, on 8 ½" x 11" paper, inclusive of resumes, forms, and pictures, but exclusive of table of contents, cover letter and tabs.

All responses should include the following elements in the format and order set forth below:

1. Section 1 - **Cover Letter**
2. Section 2 - **Table of Contents**
3. Section 3 - **Selection Criteria** – Please review selection criteria as detailed below and respond to each criterion in the order listed. Each selection criterion response shall be on a separate page.

G. Description of District Needs and Project Administration

1. General Information

The design for the Modernization Phase is DSA approved; and the design for the Additions Phase has been submitted to the DSA and is under re-review.

The District intends to select the Firm that best meets the District's needs to perform the development and construction services as described in this RFP. The Firm will be the District's representative in relation to any trade contractors hired by the Firm and will ensure compliance with the Project plans.

In addition to constructing the Project, the Firm's responsibilities include, but are not limited to:

- Value engineering;

- Procurement of long lead materials and products;
- Facilitating meetings with members or representatives of the school community with an interest in the Project;
- Master scheduling the Project per preliminary master schedule, milestones established by the District;
- Cost Control for the Project; and
- Ensuring all costs for the Project are appropriately separated and documented for each Phase, such that all costs for Phase 1 Modernization and Phase 2 Additions can be clearly distinguished. Clear separation and documentation of costs is critical to meet Office of Public School Construction grant requirements.

2. "Lease-Leaseback" Structure

Any agreement reached will conform to the statutory framework for the lease/leaseback delivery method. (Ed. Code, § 17406 et seq.)

3. Construction Services

Firm will perform the construction of the Project, acting as a general contractor pursuant to Site and Facilities Lease Agreements and may contract with separate subcontractors to perform the various trades comprising the entire scope of work, consistent with the contract documents.

4. District Project Management Description

The District's Board of Trustees will be responsible for making final decisions, but the District's Superintendent or designee will be responsible for day-to-day decisions.

5. Subcontractor Procurement

Firm will select subcontractors in accordance with Education Code section 17406. Specifically, the following subcontracting procedures shall be applicable to this work:

1. The District requests that Firms list subcontractors in their proposals.
2. For subcontractors, the successful proposer shall proceed as follows in awarding construction subcontracts with a value exceeding one-half of one percent of the price allocable to construction work:
 - (i) Provide public notice of availability of work to be subcontracted in accordance with the publication requirements applicable to the competitive bidding process of the District (once per week for two weeks in a newspaper of general circulation), including a fixed date and time on which qualifications statements, bids, or proposals will be due.
 - (ii) Establish reasonable qualification criteria and standards.
 - (iii) Award the subcontract either on a best value basis or to the lowest responsible bidder. This process may include prequalification or short-listing.

The District reserves the right to review and approve the Firm's list of proposed subcontractors prior to commencement of any work to be performed on the Project.

6. Relationship to Outside Governmental Agencies

Depending upon the scope of work, the Firm may be required to assist the District in working with various outside governmental agencies, including but not limited to, the following as applicable: City or County Planning Commissions and Departments, the Department of Toxic Substances Control, the

regional water quality control board, the regional air quality management district, the California Department of Education, the DSA, the State Allocation Board, and the Office of Public School Construction. Firm shall discuss its experience with each of these agencies.

7. Conflict of Interest

Firm shall certify that no official or employee of the District, nor any business entity in which an official of the District has an interest, has been employed or retained to solicit or assist in the procuring of the resulting construction agreement, nor that any such person will be employed in the performance of any construction agreement without immediately divulging this fact to the District.

8. Assignment

Any construction agreement resulting from this RFP and any amendments or supplements thereto shall not be assignable by the successful Firm either voluntarily or by operation of law without the written approval of the District.

9. AB 566

Firm must comply with requirements to provide a "skilled and trained workforce," as set forth by the Education and Public Contract Codes.

10. Prevailing Wage

Firm shall comply with the provisions of the Labor Code pertaining to payment of the generally prevailing rate of wages and apprenticeships or other training programs. The Department of Industrial Relations has made available the general prevailing rate of per diem wages in the locality in which the work is to be performed for each craft, classification, or type of worker needed to execute the contract, including employer payments for health and welfare, pension, vacation, apprenticeship, and similar purposes. Copies of these prevailing rates are available to any interested party upon request and are online at <http://www.dir.ca.gov/DLSR>.

The contractor and all subcontractors shall pay not less than the specified rates to all workers employed by them in the execution of the contract. It is the contractor's responsibility to determine any rate change.

The schedule of per diem wages is based upon a working day of eight (8) hours. The rate for holiday and overtime work shall be at least time and one half.

11. Labor Compliance Monitoring

The Project is subject to compliance monitoring and enforcement by the California Department of Industrial Relations. In accordance with Labor Code section 1771.1, all bidders, contractors, and subcontractors working at the site shall be duly registered with the Department of Industrial Relations at time of bid opening and at all relevant times. Proof of registration shall be provided as to all such contractors prior to the commencement of any work.

H. District's Standards to Be Used in Evaluating Proposals, Selection Criteria, and Scoring

The District will select the successful proposal based on the criteria below. Each criterion will be evaluated as part of the best value score. There shall be no minimum qualification score. For each criterion, the District shall use the methodology and weighting system below.

The District, at its sole discretion, may elect to interview firms of its choosing, or may select a contractor based upon the information provided in the written proposal. If the District elects to interview firm(s), it will be an opportunity for the District selection committee to review the firm's history, experience, qualifications, quality control and other matters the committee deems relevant to the firm's evaluation and to gather

additional information to finalize a best value score. If a firm is requested to come to an interview to meet with the District selection committee, the key proposed Project staff will be required to attend the interview. The District anticipates holding interviews, if any, between **Tuesday, February 21, 2023 – Friday, February 24, 2023**. The District reserves the right, in its sole discretion, to reschedule these interviews if it deems it appropriate.

The District shall score each of these criterion based on the points allocation below, and based on its evaluation and impressions of the responses and information received from contractors. The total shall be the best value score. The District will select the firm with the highest best value score. If the District and said firm cannot agree on contract terms, then the District shall select the next highest best value score and so on. The District reserves the right to reject all proposals at any time before ratification of a contract.

Selection Criteria	Elements to be addressed by contractor's proposal for each selection criterion
1. Strength of key personnel dedicated to the Project (80 points)	<ul style="list-style-type: none"> Organizational charts of the Firm Firm name and address Firm history Former names of Firm Contractor license Whether contracting license has ever been revoked Whether contracting license has been suspended in the past five (5) years Statement indicating all claims in which Firm or key personnel were involved in any way with litigation regarding construction projects within the past five years Firm's Department of Industrial Relations registration number Description of the Firm and its organizational structure List any individuals who are authorized to sign a legal document, binding the Firm. Resumes of key personnel to be involved with the Project, including their school construction experience NOTE: Upon engagement, any change in personnel must be approved by the District. Firm shall be responsible for any additional costs incurred by the engagement of a change in personnel.
2. Relevant/ Recent Experience (100 points)	<ul style="list-style-type: none"> Relevant and recent experience the Firm's principals have delivering similar lease-leaseback projects on public school campuses beginning with most recent projects and including the dollar amount of each project. List projects the Firm's principals have successfully delivered for the past five (5) years. Including project name, location, owner contact, initial budget and final budget, initial completion date and final completion date, and any dollars of unused contingency returned to owner. Describe whether and how the contractor would be able to meet the skilled and trained workforce requirement. Describe which trades the Firm is able to self-perform. Describe the Firm's experience with BIM modeling. Describe the Firm's experience with all software programs the Firm uses to assist with scheduling for a project.
3. Local Experience (70 points)	<ul style="list-style-type: none"> Describe your experience working on lease-leaseback projects within Glenn County. Describe the Firm's knowledge and understanding of local environment factors that may affect Project delivery, including but not limited to local City/County approval processes. Describe any relationships that may facilitate a timely and efficient Project delivery. Describe the location of the contractor's nearest local office and main office, if different.

4. Safety Record (25 points)	<ul style="list-style-type: none"> • Please provide your Experience Modification Rate for the past three (3) consecutive years. • Please detail any additional information relating to safety that you would like the District to consider. 														
5. Price Proposal (125 points)	<ul style="list-style-type: none"> • Please complete and submit the price proposal attached hereto as <u>Exhibit B and Exhibit C</u>. • Firm's price proposals will be evaluated based on the costs/percentages expressed therein. • For scoring purposes, the value of the parties' price proposals shall take into account the aggregate of the price proposal provided in <u>Exhibit B</u> and the estimated price proposal figure provided in <u>Exhibit C</u>. • Scoring shall be based on the following: <table data-bbox="535 577 1331 798"> <tr> <td>• Lowest price proposal</td><td>125 points</td></tr> <tr> <td>• 0-2% higher than lowest price proposal</td><td>123 points</td></tr> <tr> <td>• 2.01-4% higher than lowest price proposal</td><td>121 points</td></tr> <tr> <td>• 4.01% - 6% higher than lowest price proposal</td><td>119 points</td></tr> <tr> <td>• 6.01% - 8% higher than lowest price proposal</td><td>117 points</td></tr> <tr> <td>• 8.01% - 10% higher than lowest price proposal</td><td>115 points</td></tr> <tr> <td>• Over 10.01% higher than lowest price proposal</td><td>113 points</td></tr> </table> 	• Lowest price proposal	125 points	• 0-2% higher than lowest price proposal	123 points	• 2.01-4% higher than lowest price proposal	121 points	• 4.01% - 6% higher than lowest price proposal	119 points	• 6.01% - 8% higher than lowest price proposal	117 points	• 8.01% - 10% higher than lowest price proposal	115 points	• Over 10.01% higher than lowest price proposal	113 points
• Lowest price proposal	125 points														
• 0-2% higher than lowest price proposal	123 points														
• 2.01-4% higher than lowest price proposal	121 points														
• 4.01% - 6% higher than lowest price proposal	119 points														
• 6.01% - 8% higher than lowest price proposal	117 points														
• 8.01% - 10% higher than lowest price proposal	115 points														
• Over 10.01% higher than lowest price proposal	113 points														
6. Project Specific Plans (80 points)	<ul style="list-style-type: none"> • Please explain whether and how the Firm can meet the District's desired timeline based on <u>Exhibit A</u>. • Explain the Firm's methods and overall strategic plan to complete this specific Project in a timely and competent manner. • Describe the Firm's approach to value engineering and how it would be applied to this Project. Provide ten (10) specific value engineering options with values for Phase 2 of the Project. • Describe the Firm's expected markup on any change order/contingency work for this Project. • Identify any expected supply chain challenges and long lead item purchases for this Project. 														
7. Financial Capability (20 points)	<ul style="list-style-type: none"> • Provide a statement on financial resources, bonding capacity, and insurance coverage, including the volume of construction in dollars for each of the past five (5) years. • Include information on firm's experience/ability to assist with the financing of a project. 														

A review and selection committee that the District intends to be composed of key personnel from within and outside the District will review and evaluate all proposals. Proposals will be kept confidential to the extent permitted by law.

Submittals will be reviewed for responsiveness and evaluated pursuant to established objective criteria discussed above. Final selection of a Firm, terms and conditions of any and all agreements and authority to proceed with noted construction services, shall be at the discretion of the District.

I. Protests

A proposer may protest an award if he/she believes that the award was not in compliance with law, Board policy, or this RFP's specifications. A protest must be filed in writing with the District within five (5) working days after receipt of notification of the intent to award the contract and shall include all documents supporting or justifying the protest. A proposer's failure to file protest documents in a timely manner shall constitute a waiver of his/her right to protest the award of the contract, and shall also constitute a failure to exhaust an available administrative remedy and bar any further action. The District reserves all its rights, including, but not limited to, the right to waive minor informalities or irregularities.

Exhibit A
Description of the Project

Phase 1: Plaza Elementary School Modernization

Anticipated Project Cost/Budget: \$1,600,000

The scope of work for this Project includes:

Campus modernization including accessibility, fire alarm, intercom, and basic finishes at existing classrooms and administrative buildings, as well as re-roofing the administration building.

A copy of the DSA approved plans and specifications are available by contacting jhuang@rainforthgrau.com and made a part of this RFP. Contractor should review the plans and specifications carefully and submit a guaranteed maximum price proposal based thereon.

Project Schedule:

The District desires to begin construction on May 1, 2023, achieve substantial completion by August 31, 2023, and achieve final completion the Project on or before September 30, 2023.

Phase 2: Plaza Elementary School Additions

Anticipated Project Cost/Budget: \$5,400,000

The scope of work for this Project includes:

Construction of a gymnasium, three relocatable classrooms, a well, a pumphouse and pump, water storage tanks and associated site work.

The Phase 2 plans and specifications are currently under DSA review with approval expected in March 2023. A copy of the summary plan sheets are available by contacting jhuang@rainforthgrau.com and made a part of this RFP. Contractor should review the summary plan sheets carefully and submit an **estimated** guaranteed maximum price proposal based thereon.

Project Schedule:

The District desires to commence preconstruction on this Project on March 20, 2023, begin construction on August 1, 2023, achieve substantial completion by May 1, 2024, and achieve final completion the Project on or before August 3, 2024.

Exhibit B
Price Proposal for Phase 1

Phase 1: PLAZA ELEMENTARY SCHOOL MODERNIZATION

The plans and specifications for the Modernization Phase are complete, and the District seeks a "true" price proposal which will form the basis for any lease-leaseback contract for the Modernization Phase. Contractors will not be permitted to increase their price proposals if they are awarded the contract.

Contractor hereby submits the following Guaranteed Maximum Price proposal for the completion of the Modernization Phase, which includes all costs for completion of the Project including, without limitation, necessary labor, materials, subcontract costs, tools, equipment, utilities, services, transportation, overhead, supervision, general conditions and administration costs, permits, taxes and profit:

Base Construction Fee:

Plus

Contractor Contingency: (5% of Construction Fee)

Plus

District Contingency: (5% of Construction Fee)

Total (GMP) for Modernization Phase:

\$ _____
(Print in Numbers)

(Write in Words)

Exhibit C
Price Proposal for Phase 2

Phase 2: PLAZA ELEMENTARY SCHOOL ADDITIONS

The proposing Firm should prepare their price proposal for the Additions Phase based on the cost categories shown in **Exhibit C-1**. The Firm will be expected to adhere to these categories at the time of GMP finalization, unless they can demonstrate a cost savings for the District. The proposing Firm should provide its price proposal by completing the form below.

A. Proposed Preconstruction Services Price
(Not to Exceed)

\$20,000.00

List titles of personnel performing preconstruction services, and accompanying hourly rates:

Title	Hourly Rate

B. Direct Costs (hypothetical)

\$5,000,000

C. General Conditions

(to be expressed as a dollar figure that includes all costs identified as general conditions costs on contractor's cost allocation breakdown for the anticipated construction duration on **Exhibit A**. This general conditions figure will be binding at the time of GMP finalization).

\$ _____

D. Bonds & Insurance

(to be expressed here as a percentage that will be applied to the Project's cost. This percentage will be binding at the time of GMP finalization absent a showing of good cause). Required bonds and insurance coverages are specified in Section 3 (subsections 3.01-3.19) of the Facilities Lease, and the Project Specific Conditions (Article 1.2.1 of the Facilities Lease).

% _____

D.1 Multiply bond percentage against hypothetical costs of \$5,000,000

\$ _____

E. Price including Overhead and Profit

(to be expressed here as a percentage that will ultimately be applied to the Project's "Direct Costs" identified in the Cost Allocation Breakdown. This listed percentage will be the percentage binding at the time of GMP finalization.)

% _____

E.1. Multiply the above Price in "E" by hypothetical cost of \$5,000,000

\$ _____

Contractor's "Price Proposal" for Additions Phase

A + B + C + D1 + E1 =

\$

(Print In Numbers and write in words)

Exhibit C-1
Cost Allocation Breakdown

Project (On Site Jobsite Staff)		Direct Cost of the Work	General Conditions	Overhead and Profit	Paid by District
1	Operations Manager		x		
2	Project Manager		x		
3	Project Superintendent		x		
4	Project Engineer		x		
5	Home Office Engineer		x		
6	Scheduling Engineer		x		
7	Field Engineer		x		
8	Draftsman/Detailer		x		
9	Record Drawings		x		
10	Field Accountant		x		
11	Time Keeper/Checker		x		
12	Secretarial/Clerk Typist		x		
13	Independent Surveyor		x		
14	Safety & E.E.O. Officer		x		
15	Runner/Water Boy		x		
16	Vacation Time/Job Site Staff		x		
17	Sick Leave/Job Site Staff		x		
18	Bonuses/Job Site Staff			x	
19	Quality Control Program		x		
20	Qualified SWPPP Practitioner (QSP)	x			
21	SWPPP Creation, Approval, Notifications	x			
Temporary Utilities		Direct Cost of the Work	General Conditions	Overhead and Profit	Paid by District
1	Telephone Installation		x		
2	Telephone Monthly Charges		x		
3	Elect Power Installation	x			
4	Elect Power Distribution - Wiring/Spider boxes/Lighting for construction	x			
5	Permanent Elect Power Monthly Charges				x
6	All Temporary Power Costs	x			
7	Water Service for Construction	x			
8	Heating & Cooling Costs for construction	x			

9	Light Bulbs & Misc. Supplies for construction	x			
10	Clean-Up-Periodical	x			
11	Clean-Up-Final	x			
12	Dump Permits and Fees	x			
13	Recycling/Trash Dumpster Removal/Hauling	x			
14	Flagger/Traffic Control				
15	Dust Control	x			
16	Temporary Road and Maintenance if required	x			
17	Trash Chute & Hopper (if applicable)	x			
Direct Job Costs		Direct Cost of the Work	General Conditions	Overhead and Profit	Paid by District
1	Wages of Construction Labor	x			
2	Labor/Fringe Benefits & Burden	x			
3	Subcontract Costs	x			
4	Material & Equipment/Included		x		
	a. Contractor Owned Equip. trucks		x		
	b. Small Tools – Purchase		x		
	c. Small Tools – Rental		x		
5	Warranty Work & Coordination			x	
Temporary Facilities		Direct Cost of the Work	General Conditions	Overhead and Profit	Paid by District
1	Office Trailer including separate trailer for IOR (office trailers must include lockable door, 2 desks, 2 chairs, 1 file cabinet, and wifi-connection)		x		
2	Storage Trailer & Tool Shed Rental		x		
3	Office Furniture/Equip/computers		x		
4	Xerox Copies/Misc. Printing		x		
5	Postage/UPS/FedEx		x		
6	Project Photographs		x		
7	Temporary Toilets		x		
8	Project Sign		x		
9	Temporary Fencing/Enclosures		x		
10	Covered Walkways if required	x			
11	Barricades	x			

12	Temporary Stairs	x			
13	Opening Protection	x			
14	Safety Railing & Nets	x			
15	Drinking Water/Cooler/Cup		x		
16	Safety /First Aid Supplies		x		
17	Fire Fighting Equipment		x		
18	Security Guards		x		
19	Watchman Service		x		
20	Phone/fax lines, cell phones, WiFi		x		
21	Temporary "Swing space" portables to house teachers and students as required for phasing	Do Not Include			
22	Utility connections and civil work needed for temporary "swing space" portables as required for phasing	Do Not Include			
Miscellaneous Project Costs		Direct Cost of the Work	General Conditions	Overhead and Profit	Paid by District
1	Performance and Payment Bonds	Include on proposal form			
2	Developer-provided insurance	Include on proposal form			
3	Printing - Drwgs & Specs (Max of 15 sets)				x
4	Initial Soils Investigation				x
5	Testing and Inspection				x
6	Maintenance After Occupancy				x
7	Facility Operator/Training	x			
Hoisting		Direct Cost of the Work	General Conditions	Overhead and Profit	Paid by District
1	Hoist & Tower Rental	x			
2	Hoist Landing & Fronts	x			
3	Hoist Operator	x			
4	Hoist Safety Inspections	x			
5	Hoist Material Skips/Hoppers	x			
6	Erect & Dismantle Hoists	x			
7	Crane Rental	x			
8	Crane Operators	x			
9	Crane Safety Inspections	x			

10	Erect & Dismantle Crane	x			
11	Fuel, Repairs, Maintenance	x			
12	Crane Raising/Jumping Costs	x			
13	Safety Inspections	x			
14	Forklift Rental	x			
15	Forklift Operator	x			
16	Forklift Safety Inspections	x			
17	Fuel, Repairs, Maintenance	x			

Exhibit D
SITE AND FACILITIES LEASE DOCUMENTS

905-100/6508890.1

PREQUALIFICATION QUESTIONNAIRE FOR PROSPECTIVE BIDDERS

The Plaza Elementary School District ("District") has determined that contractors on future projects ("Contractor(s)" or "Firm(s)") must be prequalified prior to submitting a bid or proposal on a project. This form must be completed by:

- A Contractor with an A, B, C-4, C-7, C-10, C-16, C-20, C-34, C-36, C-38, C-42, C-43, and/or C-46 license(s) that intends to bid as a general contractor (prime contractor) directly to the District.
- A Contractor with an A, B, C-4, C-7, C-10, C-16, C-20, C-34, C-36, C-38, C-42, C-43, and/or C-46 license(s) that intends to bid as a first-tier subcontractor to a general contractor (prime contractor) that is bidding directly to the District.

Form Submission. Contractors must complete this District form; no other prequalification documents submitted by a Contractor will meet the District's requirements. All Contractors shall submit completed questionnaires and financial statements to pconklin@plazaschool.org

References. The District reserves the right to contact any representative at Contractor's previous projects to gather information about the Contractor and/or to base the District's prequalification determination on a scoring of Contractor's references' responses to questions.

Updates. Contractors who are prequalified must update their prequalification questionnaire if or when Contractor's status or information changes. The District reserves the right to adjust, suspend, or rescind the prequalification rating of any Contractor based on subsequently learned information.

Nonresponsiveness. A Contractor's prequalification questionnaire shall be deemed nonresponsive if, without limitation, the Contractor's prequalification questionnaire is not returned on time, does not provide all requested information, is not signed under penalty of perjury by an individual who has the authority to bind the Contractor, is not updated as required or is misleading or inaccurate in any material manner (e.g., financial resources are overstated; previous violations of law are not accurately reported).

Rejection/Waiver/Request. The District reserves the right, in its sole discretion, to reject any or all prequalification questionnaires, to waive irregularities in any prequalification questionnaire or to request further information or documentation from any Contractor.

Public Records. Although the names of Contractors seeking prequalification may be public information, pursuant to, without limitation, Public Contract Code sections 20111.5(a) and 2011.6 (b), each Contractor's questionnaire and financial statements "shall not be public records and shall not be open to public inspection." However, the contents of Contractor's prequalification questionnaires and financial statements may be disclosed to third parties for purposes of clarification or investigation of material allegations or in any appeal process.

Appeal. A Contractor may appeal the District's decision. If a Contractor decides to appeal the District's prequalification decision, it must follow the following procedure:

1. Contractor shall submit, in writing, within five (5) working days from District's determination, a request for a written response from the District to explain the District's determination.
2. Within five (5) working days from receipt of the District's written response to the Contractor's request, Contractor may submit, in writing, a request for a meeting with the District's staff. Contractor may submit with the request any and all information that it believes supports a finding that District's determination should be changed.
3. District staff shall hold a meeting with the Contractor. If the Contractor continues to contest the District's determination after that meeting with District staff, then the Contractor may address the Board at the next public noticed meeting of the District's governing board, pursuant to the governing board's procedures for public comment.
TO PRESERVE THE CONTRACTOR'S RIGHT TO CHALLENGE THE DISTRICT'S DETERMINATION, THE CONTRACTOR SHALL ADDRESS THE BOARD AT THE NEXT PUBLIC NOTICED MEETING OF THE BOARD AFTER CONTRACTOR'S MEETING WITH DISTRICT STAFF.

4. **FAILURE OF A CONTRACTOR TO TIMELY FOLLOW ALL APPEAL STEPS SHALL BE A WAIVER OF THE CONTRACTOR'S RIGHT TO APPEAL THE DISTRICT'S DECISION.**

CONTRACTOR (OR "FIRM") INFORMATION			
Contractor's company name:			
Address:			
Telephone:			
Mobile telephone:			
E-mail:			
Years in business under current company name:			
Years at the above address:			
Types of work performed with own forces:			
Gross revenue of the Firm for the past three (3) years:			
\$	\$	\$	
Submit an audited or reviewed financial statement for the past two (2) full fiscal years. A letter verifying availability of a line of credit may also be attached; however, it will be considered as supplemental information only, and is not a substitute for the required financial statement.			
Name of license holder exactly as on file with the California State License Board:			
License classification(s):			
License Number(s):			
License expiration date(s):			
Department of Industrial Relations registration number (Per Labor Code section 1725.5):			
Number of years license holder has held the listed license(s):			
Number of years Contractor has done business in California under contractor's license law:			
Number of years Contractor has done business in California under current Contractor's license:			
Has your Firm changed name(s) or license number(s) in the past five (5) years? (Y / N). If "yes", explain on a separate signed sheet, including the reason for the change.			
Has there been any change in ownership of the Firm at any time in the past five (5) years? NOTE: A corporation whose shares are publicly traded is not required to answer this question. (Y / N). If "yes", explain on a separate signed sheet, including the reason for the change.			
Is the Firm a subsidiary, parent, holding company, or affiliate of another construction firm? NOTE: Include information about other firms if one firm owns ten percent (10%) or more of another, or if an owner, partner, or officer of your Firm holds a similar position in another firm. (Y / N). If "yes", explain on a separate signed sheet, the name of the related company(ies) and the percent ownership.			
Indicate the form of Contractor's firm (type of business entity):			
<input type="checkbox"/> Individual <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Limited Partnership <input type="checkbox"/> Corporation, State: _____ <input type="checkbox"/> Limited Liability Company <input type="checkbox"/> Joint Venture <input type="checkbox"/> Other: _____			
List the following for each corporation officer, general partner, limited partner, owner, etc. (as applicable) for the Contractor's type of entity. For joint ventures, include this information for each entity in the joint venture and the percent ownership of each joint venture. Attach all additional information on separate signed sheets as needed.			

Name	Position	Years with Co.	% Ownership

Identify every construction firm, contractor and/or construction management firm that the Contractor or any person listed above has been associated with (as officer, general partner, limited partner, owner, RMO, RME etc.) at any time during the **past five (5) years** ("Associated Firm"). Include all additional references and/or information on separate signed sheets. NOTE: For this question, "owner" and "partner" refers to ownership of ten percent (10%) or more of the business, or ten percent (10%) or more of its stock if the business is a corporation. include all additional information on separate signed sheets as needed.

Name of Person at Associated Firm	Name of Associated Firm	Contractor's License No. of Associated Firm	Dates of Person's Participation with Associated Firm

CONTRACTOR'S BONDING COMPANY (SURETY) INFORMATION

Name(s) of bonding company(ies) your Firm has utilized over the past five (5) years (not broker or agency):

Address(es) of those bonding company(ies):

Number of years Contractor has been with those bonding company/surety:

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Name of broker/agent:

--

Address of broker/agent:

--

Telephone number of broker/agent:

--

E-mail of broker/agent:

--

Contractor's total current bonding capacity: \$

CONTRACTOR'S INSURANCE INFORMATION

Name of insurance company(ies) your Firm has utilized over the past five (5) years (not broker or agency):

Address of those insurance company(ies):

"Best" rating(s) for those insurance company(ies):

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Number of years Contractor has been with those insurance company(ies):

--	--	--

Name of broker/agent:

Address of broker/agent:

Telephone number of broker/agent:

E-mail of broker/agent:

Contractor's current insurance limits for the following types of coverage:

Commercial General Liability	Combined Single Limit (per occurrence)	\$
	Combined Single Limit (aggregate)	\$
Product Liability & Completed Operations	(aggregate)	\$
	(per occurrence)	\$
Automobile Liability – Any Auto	Combined Single Limit (aggregate)	\$
Automobile Liability – Any Auto	Combined Single Limit (per occurrence)	\$
Employers' Liability		\$
Builder's Risk (Course of Construction)		

Workers' Compensation Experience Modification Rate for the past five (5) premium years:

(1) Current year:	(2)	(3)
	(4)	(5)

QUESTIONS

Pass/Fail Questions (Essential Criteria)

1.	Has your Firm contracted for and completed construction of a minimum of: <ul style="list-style-type: none"> • Four (4) California K-12 public school district construction projects, • Each with a value of at least \$100,000, and • All within the past five (5) years? (Please circle one). <p>NOTE: You must list these projects in the "Contractor Project References" Section.</p>	YES NO NO = cannot prequalify
2.	Does your Firm currently hold all contractors license(s) necessary to perform the work and have those license(s) been consistently active for at least five (5) years without revocation or suspension? (Please circle one).	YES NO NO = cannot prequalify
3.	Has your Firm or an Associated Firm been found non-responsible, debarred, disqualified, forbidden, or otherwise prohibited from performing work and/or bidding on work for any public agency within California within the past five (5) years? (Please circle one).	YES NO YES = cannot prequalify
4.	Has your Firm or an Associated Firm defaulted on a contract or been terminated for cause by any public agency on any project within California within the past five (5) years and, if so and if challenged, has that default or termination been upheld by a court or an arbitrator? (Please circle one).	YES NO YES = cannot prequalify
5.	Has your Firm or an Associated Firm or any of their owners or officers been convicted of a crime under federal, state, or local law involving: <ul style="list-style-type: none"> (1) Bidding for, awarding of, or performance of a contract with a public entity; (2) Making a false claim(s) to any public entity; or (3) Fraud, theft, or other act of dishonesty to any contracting party within the past ten (10) years ? (Please circle one).	YES NO YES = cannot prequalify
6.	Has a performance bond surety for your Firm or a performance bond surety for an Associated Firm had to: <ul style="list-style-type: none"> (1) Take over or complete a project, (2) Supervise the work of a project, or (3) Pay amounts to third parties, related to construction activities of your Firm or an Associated Firm within the past five (5) years? (Please circle one).	YES NO YES = cannot prequalify



If you answered:
"NO" to questions 1-2 or
"YES" to questions 3-6, then STOP.
You are not eligible for prequalification at this time.

Scored Questions

1.	Has your Firm paid liquidated damages pursuant to a contract for a project with either a public or private owner within the past five (5) years? (Please circle one). If YES, explain and indicate on separate signed sheet(s) the project name(s), damages(s), and date(s).	<u>YES</u> <u>NO</u>
2.	Has your Firm paid a premium of more than one percent (1%) for a performance and payment bond on any project(s) within the past five (5) years? (Please circle one). If YES, explain and indicate on separate signed sheet(s) the project name(s), the premium amount(s), and date(s).	<u>YES</u> <u>NO</u>
3.	Has any insurer had to pay amounts to third parties that were in any way related to construction activities of your Firm within the past five (5) years? (Please circle one). If YES, explain and indicate on separate signed sheet(s) the project name(s), the amount(s) paid, and date(s).	<u>YES</u> <u>NO</u>
4.	Has your Firm's Workers' Compensation Experience Modification Rate exceeded 1.0 at any time for the past five (5) premium years? (Please circle one). If YES, explain and indicate on separate signed sheet(s) the EMR(s) and the applicable date(s).	<u>YES</u> <u>NO</u>
5.	Has there been a period when your Firm had employees but was without workers' compensation insurance or state-approved self-insurance within the past five (5) years? (Please circle one). If YES, explain and indicate on separate signed sheet(s) the reason(s) for not having this insurance and the applicable date(s).	<u>YES</u> <u>NO</u>
6.	Has your Firm declared bankruptcy or been placed in receivership within the past five (5) years? (Please circle one). If YES, explain and indicate on separate signed sheet(s) the type of bankruptcy, the Firm's current recovery plan, and the applicable date(s).	<u>YES</u> <u>NO</u>
7.	Has your Firm been denied bond coverage by a surety company, or has there been a period of time when your Firm had no surety bond in place during a public construction project when one was required within the past five (5) years? (Please circle one). If YES, provide details on a separate signed sheet indicating the date(s) when your Firm was denied coverage and the name of the company or companies which denied coverage; and the period(s) during which you had no surety bond in place.	<u>YES</u> <u>NO</u>
8.	Has a project owner, general contractor, architect, or construction manager filed claim(s) in an amount exceeding \$50,000 against your Firm, or has your Firm filed claim(s) in an amount exceeding \$50,000 against a project owner, general contractor, architect, or construction manager in the past five (5) years? If YES, explain and indicate on separate signed sheet(s) the project name(s), claim(s) and the date(s) of claim(s).	<u>YES</u> <u>NO</u>

9.	Has your Firm or an Associated Firm been cited and/or assessed any penalties for non-compliance with state and/or federal laws and/or regulations, including public bidding requirements and Labor Code violations, within the past five (5) years? If "YES," indicate on separate signed sheet(s) the project name(s), violation(s), and date(s) of citation(s) and/or assessment(s).	<u>YES</u> <u>NO</u>
10.	Has your Firm been cited and/or assessed penalties by the Environmental Protection Agency, any air quality management district, any regional water quality control board, or any other environmental agency within the past five (5) years? If "yes," indicate on separate signed sheet(s) the project name(s), violation(s), and date(s) of citation.	<u>YES</u> <u>NO</u>
11.	Has CAL OSHA and/or federal Occupational Safety and Health Administration cited and assessed penalties against your Firm, including any "serious," "willful" or "repeat" violations of safety or health regulations within the past five (5) years? If "yes," indicate on separate signed sheet(s) the project name(s), violation(s), and date(s) of citation. If the citation was appealed and a decision has been issued, state the case number and the date of the decision.	<u>YES</u> <u>NO</u>
12.	Has your Firm been required to pay either back wages or penalties for its failure to comply with California's prevailing wage laws, with California's apprenticeship laws or regulations, or with federal Davis-Bacon prevailing wage laws within the past five (5) years? If "yes," indicate on separate signed sheet(s) the project name(s), the nature of the violation(s), the name and owner of the project(s), the number of employees who were initially underpaid and the amount of back wages and penalties that your Firm was required to pay.	<u>YES</u> <u>NO</u>
13.	Does your Firm require <u>weekly</u> , documented safety meetings to be held for construction employees and field supervisors during the course of a project?	<u>YES</u> <u>NO</u>
14.	Provide the name, address and telephone number of the apprenticeship program (approved by the California Apprenticeship Council) from whom you intend to request the dispatch of apprentices to your Firm for use on any public work project for which you are awarded a contract by the District.	

CONTRACTOR PROJECT REFERENCES

List **ALL** projects in which your Firm has participated as a contractor or first-tier subcontractor during the past **five (5) years** with a Firm contract value of more than **\$100,000**.

- You may limit your response to the thirty (30) most-recently completed projects, but you **must** include at least the four (4) most recent California K-12 public school projects with a contract value of more than \$100,000 performed by your Firm.
- Include all information indicated below on separate signed sheets as necessary, and explain or clarify any response as necessary

Project Name/Identification:

Project address/location:

Project owner, contact person, and telephone:

Project architect name and telephone number:

If contractor was a subcontractor on the project, name of general contractor and telephone number:

Scope of Work:

Original completion date:

Date completed:

Initial contract value (as of time of bid award):

Final contract value:

Did the project include constructing or modernizing an earthquake resistant building?

CERTIFICATION

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct:

Date:

Legal Name of Contractor:

Signature:

Print Name:

Title:

School Site Council Agenda

Wednesday, January 18th, 2023

3:00pm

- I. Welcome/Introductions**
- II. Approve October 13th Minutes**
- III. Local Control and Accountability Plan (LCAP) Goals**
- IV. School Safety Plan**
- V. School Accountability Report Card (SARC)**
- VI. Long Term Strategic Planning**
- VII. Adjourn**
 - a. Next School Site Council Meeting: Thursday, February 16th, 2023 @ 3pm**

School Site Council Minutes

Thursday, October 13th, 2022

3:00pm

- I. Welcome/Introductions** – The meeting was called to order at 2:57PM
- II. Election of Officers** – Kadie Salazar was nominated as chair. Chelsey Sgontz nominated as secretary
- III. Approve Minutes** – Scott F. moved to approve. All approved.
- IV. The Plaza Promise: Long Term Strategic Planning** – Mr. Conklin discussed the LTSP process this year.
- V. Local Control and Accountability Plan (LCAP) Goals** – Mr. Conklin discussed the LCAP and presented the goals. The main requirement this year is to update the metrics from last year's data
- VI. School Safety Plan** – Mr. Conklin discussed the School Safety Plan and informed SSC it must be board approved by March 1st
- VII. School Accountability Report Card (SARC)** – Mr. Conklin explained the SARC requirements that must be published by February 1st.
- VIII. Long Term Strategic Planning** – SSC and LTSP group members worked in groups as Mr. Conklin presented LTSP goals and expectations.
- IX. Adjourn**
 - a. Long Term Strategic Planning Meeting: Wednesday, December 21st @ 3PM**
 - b. School Site Council Meeting: Wednesday, January 18th @ 3pm**
 - c. Long Term Strategic Planning and School Site Council Meeting: Thursday, February 16th, 2023 @ 3pm**

ADMINISTERING MEDICATION AND MONITORING HEALTH CONDITIONS

The Governing Board believes that regular school attendance is critical to student learning and that students who need to take medication prescribed or ordered for them by their authorized health care providers should be able to participate in the educational program.

Any medication prescribed for a student with a disability who is qualified to receive services under the Individuals with Disabilities Education Act or Section 504 of the Rehabilitation Act of 1973 shall be administered in accordance with the student's individualized education program or Section 504 services plan, as applicable.

For the administration of medication to other students during school or school-related activities, the Superintendent or designee shall develop protocols which shall include options for allowing parents/guardians to administer medication to their child at school, designate other individuals to do so on their behalf, and, with the student's authorized health care provider's approval, request the district's permission for the student to self-administer a medication or self-monitor and/or self-test for a medical condition. Such processes shall be implemented in a manner that preserves campus security, minimizes instructional interruptions, and promotes student safety and privacy.

The Superintendent or designee shall make epinephrine auto-injectors available at each school for providing emergency medical aid to any person suffering, or reasonably believed to be suffering, from an anaphylactic reaction. (Education Code 49414)

The Superintendent or designee shall make naloxone hydrochloride or another opioid antagonist available for emergency medical aid to any person suffering, or reasonably believed to be suffering, from an opioid overdose. (Education Code 49414.3)

Because of the conflict between state and federal law regarding the legality of medicinal cannabis, the Board prohibits the administration of medicinal cannabis to students on school grounds by parents/guardians or school personnel.

The Superintendent or designee shall collaborate with city and county emergency responders, including local public health administrators, to design procedures or measures for addressing an emergency such as a public disaster or epidemic.

Administration of Medication by School Personnel

When allowed by law, medication prescribed to a student by an authorized health care provider may be administered by a school nurse or, when a school nurse or other medically licensed person is unavailable and the physician has authorized administration of medication by unlicensed personnel for a particular student, by other designated school personnel with appropriate training. School nurses and other designated school personnel shall administer medications to students in accordance with law, Board policy, administrative regulation, and, as applicable, the written statement provided by the student's parent/guardian and authorized health care provider. Such personnel shall be afforded appropriate liability protection.

PLAZA ELEMENTARY SCHOOL DISTRICT

Administering Medication & Monitoring Health Conditions (Cont.)

The Superintendent or designee shall ensure that school personnel designated to administer any medication receive appropriate training and, as necessary, retraining from qualified medical personnel before any medication is administered. At a minimum, the training shall cover how and when such medication should be administered, the recognition of symptoms and treatment, emergency follow-up procedures, and the proper documentation and storage of medication. Such trained, unlicensed designated school personnel shall be supervised by, and provided with immediate communication access to, a school nurse, physician, or other appropriate individual.

The Superintendent or designee shall maintain documentation of the training and ongoing supervision, as well as annual written verification of competency of other designated school personnel.

State Reference Description

5 CCR 600-611 Administering medication to students

Bus. Code 2700-2837 Nursing

Bus. Code 3500-3546 Physician assistants

Bus. Code 4119.2 Acquisition of epinephrine auto-injectors

Bus. Code 4119.8 Acquisition of naloxone hydrochloride or another opioid antagonist Ed. Code

48980 Notifications at beginning of term

Ed. Code 49407 Liability for treatment

Ed. Code 49408 Emergency information

Ed. Code 49414 Emergency epinephrine auto-injectors

Ed. Code 49414.3 Emergency medical assistance; administration of medication for opioid overdose

Ed. Code 49414.5 Providing school personnel with voluntary emergency training Ed. Code

49422-49427 Employment of medical personnel

Ed. Code 49423 Administration of prescribed medication for student Ed. Code

49423.1 Inhaled asthma medication

Ed. Code 49480 Continuing medication regimen; notice

H&S Code 11362.7-11362.85 Medicinal cannabis

Federal Reference Description

20 USC 1232g Family Educational Rights and Privacy Act (FERPA) of 1974 20 USC 1400-

1482 Individuals with Disabilities Education Act

21 USC 812 Schedule of controlled substances

21 USC 844 Penalties for possession of controlled substance 29 USC 794

Rehabilitation Act of 1973, Section 504

Policy Adopted: First Read January 19th, 2023

PLAZA ELEMENTARY SCHOOL DISTRICT

Students

Administering Medication & Monitoring Health Conditions

Definitions

Authorized health care provider means an individual who is licensed by the State of California to prescribe or order medication, including, but not limited to, a physician or physician assistant. (Education Code 49423; 5 CCR 601)

Other designated school personnel means any individual employed by the district, including a nonmedical school employee, who has volunteered or consented to administer medication or otherwise assist the student and who may legally administer the medication to the student or assist the student in the administration of the medication. (5 CCR 601, 621)

Medication may include not only a substance dispensed in the United States by prescription, but also a substance that does not require a prescription, such as over-the-counter remedies, nutritional supplements, and herbal remedies. (5 CCR 601)

Epinephrine auto-injector means a disposable delivery device designed for the automatic injection of a premeasured dose of epinephrine into the human body to prevent or treat a life threatening allergic reaction. (Education Code 49414)

Anaphylaxis means a potentially life-threatening hypersensitivity to a substance, which may result from an insect sting, food allergy, drug reaction, exercise, or other cause. Symptoms may include shortness of breath, wheezing, difficulty breathing, difficulty talking or swallowing, hives, itching, swelling, shock, or asthma. (Education Code 49414)

Opioid antagonist means naloxone hydrochloride or another drug approved by the federal Food and Drug Administration that, when administered, negates or neutralizes in whole or in part the pharmacological effects of an opioid in the body and that has been approved for the treatment of an opioid overdose. (Education Code 49414.3)

Notifications to Parents/Guardians

At the beginning of each school year, the Superintendent or designee shall notify parents/guardians of the options available to students who need to take prescribed medication during the school day and the rights and responsibilities of parents/guardians regarding those options. (Education Code 49480)

In addition, the Superintendent or designee shall inform the parents/guardians of any student on a continuing medication regimen for a non-episodic condition of the following requirements: (Education Code 49480)

1. The parent/guardian is required to inform the school nurse or other designated employee of the medication being taken, the current dosage, and the name of the supervising physician.

PLAZA ELEMENTARY SCHOOL DISTRICT

Administering Medication & Monitoring Health Conditions (Cont.)

2. With the parent/guardian's consent, the school nurse or other designated employee may communicate with the student's physician regarding the medication and its effects and may counsel school personnel regarding the possible effects of the medication on the student's physical, intellectual, and social behavior, as well as possible behavioral signs and symptoms of adverse side effects, omission, or overdose.

When a student requires medication during the school day in order to participate in the educational program, the Superintendent or designee shall, as appropriate, inform the student's parents/guardians that the student may qualify for services or accommodations pursuant to the Individuals with Disabilities Education Act (20 USC 1400-1482) or Section 504 of the federal Rehabilitation Act of 1973 (29 USC 794).

Parent/Guardian Responsibilities

The responsibilities of the parent/guardian of any student who may need medication during the school day shall include, but are not limited to:

1. Submitting the parent/guardian written statement and the authorized health care provider's written statement each school year as described in the sections "Parent/Guardian Statement" and "Health Care Provider Statement" below. The parent/guardian shall provide a new authorized health care provider's statement if the medication, dosage, frequency of administration, or reason for administration changes. (Education Code 49414.5, 49423, 49423.1; 5 CCR 600, 626)
2. If the student is on a continuing medication regimen for a nonepisodic condition, informing the school nurse or other designated certificated employee of the medication being taken, the current dosage, and the name of the supervising physician, and updating the information when needed. (Education Code 49480)
3. Providing medications in properly labeled, original containers along with the authorized health care provider's instructions. For prescribed or ordered medication, the container also shall bear the name and telephone number of the pharmacy, the student's identification, and the name and phone number of the authorized health care provider. (5 CCR 606)

Parent/Guardian Statement

When district employees are to administer medication to a student, the parent/guardian's written statement shall:

1. Identify the student

Administering Medication & Monitoring Health Conditions (Cont.)

2. Grant permission for an authorized district representative to communicate directly with the student's authorized health care provider and pharmacist, as may be necessary, regarding the health care provider's written statement or any other questions that may arise with regard to the medication
3. Contain an acknowledgment that the parent/guardian understands how district employees will administer the medication or otherwise assist the student in its administration
4. Contain an acknowledgment that the parent/guardian understands the responsibilities to provide a written statement from the authorized health care provider, to ensure that the medication is delivered to the school in a proper container by an individual legally authorized to be in possession of the medication, and to provide all necessary supplies and equipment
5. Contain an acknowledgment that the parent/guardian understands the right to terminate the consent for the administration of the medication or for otherwise assisting the student in the administration of medication at any time

In addition to the requirements in items #1-5 above, if a parent/guardian has requested that the student be allowed to carry and self-administer prescription auto-injectable epinephrine or prescription inhaled asthma medication, the parent/guardian's written statement shall: (Education Code 49423, 49423.1)

1. Consent to the self-administration
2. Release the district and school personnel from civil liability if the student suffers an adverse reaction as a result of self-administering the medication

In addition to the requirements in items #1-5 above, if a parent/guardian wishes to designate an individual who is not an employee of the district to administer medication to the student, the parent/guardian's written statement shall clearly identify the individual and shall state:

1. The individual's willingness to accept the designation
2. That the individual is permitted to be on the school site
3. Any limitations on the individual's authority

Health Care Provider Statement

When any district employee is to administer prescribed medication to a student, or when a student is to be allowed to carry and self-administer prescribed medication during school hours, the authorized health care provider's written statement shall include:

PLAZA ELEMENTARY SCHOOL DISTRICT

Administering Medication & Monitoring Health Conditions (Cont.)

1. Clear identification of the student (Education Code 49423, 49423.1; 5 CCR 602)
2. The name of the medication (Education Code 49423, 49423.1; 5 CCR 602)
3. The method, amount, and time schedules by which the medication is to be taken (Education Code 49423, 49423.1; 5 CCR 602)
4. If a parent/guardian has requested that the student be allowed to self-administer medication, confirmation that the student is able to self-administer the medication (Education Code 49414.5, 49423, 49423.1; 5 CCR 602)
5. For medication that is to be administered by unlicensed personnel, confirmation by the student's health care provider that the medication may safely and appropriately be administered by unlicensed personnel (Education Code 49423, 49423.1; 5 CCR 602)
6. For medication that is to be administered on an as-needed basis, the specific symptoms that would necessitate administration of the medication, allowable frequency for administration, and indications for referral for medical evaluation
7. Possible side effects of the medication
8. Name, address, telephone number, and signature of the student's authorized health care provider

For self-administration of inhaled asthma medication, the district shall accept a written statement from a physician or surgeon contracted with a health plan licensed pursuant to Health and Safety Code 1351.2. Such written statement shall be in English and Spanish, and shall include the name and contact information for the physician or surgeon. (Education Code 49423.1)

District Responsibilities

The Superintendent or designee shall ensure that any unlicensed school personnel authorized to administer medication to a student receives appropriate training from the school nurse or other qualified medical personnel.

The school nurse or other designated school personnel shall:

1. Administer or assist in administering medication in accordance with the authorized health care provider's written statement
2. Accept delivery of medications from parents/guardians and count and record them upon receipt

Administering Medication & Monitoring Health Conditions (Cont.)

3. Maintain a list of students needing medication during the school day, including those authorized to self-administer medication, and note on the list the type of medication and the times and dosage to be administered
4. Maintain for each student a medication log which may:
 - a. Specify the student's name, medication, dose, method of administration, time of administration during the regular school day, date(s) on which the student is required to take the medication, and the authorized health care provider's name and contact information
 - b. Contain space for daily recording of the date, time, and amount of medication administered, and the signature of the individual administering the medication
5. Maintain for each student a medication record which may include the authorized health care provider's written statement, the parent/guardian's written statement, the medication log, and any other written documentation related to the administration of medication to the student
6. Ensure that student confidentiality is appropriately maintained
7. Coordinate and, as appropriate, ensure the administration of medication during field trips and other school-related activities
8. Report to a student's parent/guardian and the site administrator any refusal by the student to take the medication
9. Keep all medication to be administered by the district in a locked drawer or cabinet
10. As needed, communicate with a student's authorized health care provider and/or pharmacist regarding the medication and its effects
11. Counsel other designated school personnel regarding the possible effects of a medication on a student's physical, intellectual, and social behavior, as well as possible behavioral signs and symptoms of adverse side effects, omission, or overdose
12. Ensure that any unused, discontinued, or outdated medication is returned to the student's parent/guardian at the end of the school year or, if the medication cannot be returned, dispose of it in accordance with state laws and local ordinances
13. In the event of a medical emergency requiring administration of medication, provide immediate medical assistance, directly observe the student following the administration of medication, contact the student's parent/guardian, and determine whether the student should return to class, rest in the school office, or receive further medical assistance

Administering Medication & Monitoring Health Conditions (Cont.)

14. Report to the site administrator, the student's parent/guardian, and, if necessary, the student's authorized health care provider any instance when a medication is not administered properly, including administration of the wrong medication or failure to administer the medication in accordance with authorized health care provider's written statement

Emergency Epinephrine Auto-Injectors

The Superintendent or designee shall provide epinephrine auto-injectors to school nurses or other employees who have volunteered to administer them in an emergency and have received training. The school nurse, or a volunteer employee when a school nurse or physician is unavailable, may administer an epinephrine auto-injector to provide emergency medical aid to any person suffering, or reasonably believed to be suffering, from potentially life-threatening symptoms of anaphylaxis at school or a school activity. (Education Code 49414)

At least once per school year, the Superintendent or designee shall distribute to all staff a notice requesting volunteers to be trained to administer an epinephrine auto-injector and describing the training that the volunteer will receive. (Education Code 49414)

The principal or designee at each school may designate one or more volunteers to receive initial and annual refresher training, which shall be provided by a school nurse or other qualified person designated by a physician and surgeon authorized pursuant to Education Code 49414 and shall be based on the standards developed by the Superintendent of Public Instruction (SPI). Written materials covering the required topics for training shall be retained by the school for reference. (Education Code 49414)

A school nurse or other qualified supervisor of health, or a district administrator if the district does not have a qualified supervisor of health, shall obtain a prescription for epinephrine auto injectors for each school from an authorized physician and surgeon. Such prescription may be filled by local or mail order pharmacies or epinephrine auto-injector manufacturers.

Elementary schools shall, at a minimum, be provided one adult (regular) and one junior epinephrine auto injector. Secondary schools shall be provided at least one adult (regular) epinephrine auto injector, unless there are any students at the school who require a junior epinephrine auto injector. (Education Code 49414)

If an epinephrine auto-injector is used, the school nurse or other qualified supervisor of health shall restock the epinephrine auto-injector as soon as reasonably possible, but no later than two weeks after it is used. In addition, epinephrine auto-injectors shall be restocked before their expiration date. (Education Code 49414)

Information regarding defense and indemnification provided by the district for any and all civil liability for volunteers administering epinephrine auto-injectors shall be provided to each volunteer and retained in the employee's personnel file. (Education Code 49414)

PLAZA ELEMENTARY SCHOOL DISTRICT

Administering Medication & Monitoring Health Conditions (Cont.)

A school may accept gifts, grants, and donations from any source for the support of the school in carrying out the requirements of Education Code 49414, including, but not limited to, the acceptance of epinephrine auto-injectors from a manufacturer or wholesaler. (Education Code 49414)

The Superintendent or designee shall maintain records regarding the acquisition and disposition of epinephrine auto-injectors for a period of three years from the date the records were created. (Business and Professions Code 4119.2)

Emergency Medication for Opioid Overdose

The district may elect to make emergency naloxone hydrochloride or another opioid antagonist available at schools for the purpose of providing emergency medical aid to persons suffering, or reasonably believed to be suffering, from an opioid overdose. In determining whether to make this medication available, the Superintendent or designee shall evaluate the emergency medical response time to the school and determine whether initiating emergency medical services is an acceptable alternative to providing an opioid antagonist and training personnel to administer the medication. (Education Code 49414.3)

When available at the school site, the school nurse shall provide emergency naloxone hydrochloride or another opioid antagonist for emergency medical aid to any person exhibiting potentially life-threatening symptoms of an opioid overdose at school or a school activity. Other designated personnel who have volunteered and have received training may administer such medication when a school nurse or physician is unavailable, and shall only administer the medication by nasal spray or auto-injector. (Education Code 49414.3)

At least once per school year, the Superintendent or designee shall distribute to all staff a notice requesting volunteers to be trained to administer naloxone hydrochloride or another opioid antagonist, describing the training that the volunteer will receive, and explaining the right of the volunteer to rescind the offer to volunteer at any time, including after receiving training. The notice shall also include a statement that no benefit will be granted to or withheld from any employee based on the offer to volunteer and that there will be no retaliation against any employee for rescinding the offer to volunteer. (Education Code 49414.3)

The principal or designee may designate one or more volunteer employees to receive initial and annual refresher training, based on standards adopted by the SPI, regarding the storage and emergency use of naloxone hydrochloride or another opioid antagonist. The training shall be provided at no cost to the employee, conducted during regular working hours, and be provided by a school nurse or other qualified person designated by an authorizing physician and surgeon. Written materials provided during the training shall be retained at the school for reference. (Education Code 49414.3)

Administering Medication & Monitoring Health Conditions (Cont.)

A school nurse, other qualified supervisor of health, or, if the district does not have a qualified supervisor of health, a district administrator shall obtain a prescription for naloxone hydrochloride or another opioid antagonist for each school from an authorized physician and surgeon. Such prescription may be filled by local or mail order pharmacies or manufacturers. (Education Code 49414.3)

If the medication is used, the school nurse, other qualified supervisor of health, or district administrator, as applicable, shall restock the medication as soon as reasonably possible, but no later than two weeks after it is used. In addition, the medication shall be restocked before its expiration date. (Education Code 49414.3)

Information regarding defense and indemnification provided by the district for any and all civil liability for volunteers administering naloxone hydrochloride or another opioid antagonist for emergency aid shall be provided to each volunteer and retained in the employee's personnel file. (Education Code 49414.3)

A school may accept gifts, grants, and donations from any source for the support of the school in carrying out the requirements of Education Code 49414.3, including, but not limited to, the acceptance of the naloxone hydrochloride or another opioid antagonist from a manufacturer or wholesaler. (Education Code 49414.3)

The Superintendent or designee shall maintain records regarding the acquisition and disposition of naloxone hydrochloride or another opioid antagonist for a period of three years from the date the records were created. (Business and Professions Code 4119.8)

Policy Adopted: First Read January 19th, 2023

PLAZA ELEMENTARY SCHOOL DISTRICT