

## **VIRTUAL PERSONNEL COMMISSION MEETING**

February 10, 2021 at 4:30pm

### **MODIFIED MEETING PROCEDURES DURING COVID-19 (CORONAVIRUS) PANDEMIC:**

As per Executive Order N-29-20 from Governor Newsom, the Santa Monica-Malibu Unified School District Personnel Commission meetings will move to a virtual/teleconferencing environment using Zoom. The purpose of the Governor's executive order is to control the spread of Coronavirus (COVID-19) and to reduce and minimize the risk of infection by "limiting attendance at public assemblies, conferences, or other mass events." The intent is not to limit public participation, but rather to protect public health by following the Governor's Stay at Home executive order and LA County's Safer at Home order.



### **JOIN ZOOM MEETING**

<http://bit.ly/SMMUSDPCMEETING>

**Meeting ID: 898 6103 9433**  
**Password: SMMUSD**



### **PROVIDE PUBLIC COMMENT**

You may submit a request to make a public comment by e-mail to: [jhatch@smmusd.org](mailto:jhatch@smmusd.org)

- **Requests must be submitted no later than 5:00 p.m. on Tuesday, February 09, 2021**
- **Please include your full name and the specific agenda item you wish to speak to or if you would like to address a non-agenda item**
- **During the meeting via Zoom, speakers will be called upon and unmuted to make a comment – please use your full name as your Zoom profile to help expedite the process**



## PERSONNEL COMMISSION MEETING AGENDA

**February 10, 2021**

A regular meeting of the Santa Monica-Malibu Unified School District Personnel Commission will be held on **Wednesday, February 10, 2021**, at **4:30 p.m.**, via Zoom.

### **I. General Functions:**

- G.01 Call to Order
- G.02 Roll Call
- G.03 Pledge of Allegiance
- G.04 Report from Closed Session
- G.05 Approval of Agenda for Regular Meeting on February 10, 2021

Commissioner	M	S		Yes	No	Abstain	ABSENT
Lauren Robinson							
Phillip Tate							
vacant							

- G.06 Approval of Minutes for Regular Meeting on January 13, 2021

Commissioner	M	S		Yes	No	Abstain	ABSENT
Lauren Robinson							
Phillip Tate							
vacant							

- G.07 Report from the Director of Classified Personnel
- G.08 Personnel Commissioner Comments/Reports
- G.09 Communications
- G.10 Public Comments



## **PERSONNEL COMMISSION MEETING AGENDA**

Electronically Recorded (AUDIO ONLY)

**February 10, 2021**

### **PERSONNEL COMMISSIONERS:**

Mrs. Lauren Robinson and Mr. Phillip Tate

A regular meeting of the Santa Monica-Malibu Unified School District Personnel Commission will be held on **Wednesday, February 10, 2021**, at **4:30 p.m.**, via Zoom.

### ❖ **Instructions on Public Comments:**

Persons wishing to address the Personnel Commission must submit a request to make a public comment by e-mail to [jhatch@smmusd.org](mailto:jhatch@smmusd.org) no later than 5:00 p.m. on Tuesday, February 9, 2021. Please include your full name and the specific agenda item you wish to speak to *or* if you would like to address a non-agenda item if the subject matter is not scheduled on this meeting's agenda.

### **OPEN SESSION**

#### **I. GENERAL FUNCTIONS:**

G.01 Call to Order:

G.02 Roll Call:

G.03 Pledge of Allegiance:

G.04 Report from Closed Session of Personnel Commission

G.05 Approval of Agenda for Regular Meeting on February 10, 2021

G.06 Approval of Minutes for Regular Meeting on January 13, 2021

G.07 Report from the Director of Classified Personnel:

This is an opportunity for the Director of Classified Personnel to report on items relevant to Personnel Commission.

- General Comments and Updates

If you will require an accommodation to participate in the Commission meeting, please notify the Personnel Commission Office at least 48 hours prior to the meeting.

- G.08 Personnel Commissioner Comments/Reports:  
This is time during which a Personnel Commissioner may make a brief announcement or report on his/her own activities relative to Commission business. This is not a time for discussion.
- G.09 Communications:  
The Communications section provides an opportunity for the Personnel Commission to hear from the individuals or representatives listed below. All reports are limited to five (5) minutes or less.
- SEIU Report
  - Board of Education Report
- G.10 Public Comments:  
Public Comments is the time when members of the audience may address the Personnel Commission on items not scheduled on the meeting's agenda. All speakers are limited to five (5) minutes. When there is a large number of speakers, the Personnel Commission may reduce the allotted time to three (3) minutes per speaker. The Brown Act (Government Code) states that Personnel Commission members may not engage in discussion of issues raised during "Public Comments" except to ask clarifying questions, make a brief announcement, make a brief report on his or her own activities, or to refer the matter to staff.

## II. **CONSENT CALENDAR:**

Items are considered routine, require no discussion, and are normally approved all at once by the Personnel Commission. However, members of the Personnel Commission, staff, or the public may request an item be clarified and/or discussed.

### C.01 Approval of Classified Personnel Eligibility List(s):

<u>Classification</u>	<u># Eligibles</u>
Director, Risk Management	2
Paraeducator-1	5
Paraeducator-2	1
Paraeducator-3	5

- C.02 Advanced Step Placement:  
Erika Herbrechtsmeier in the classification of Physical Activities Specialist at Range A-28 Step C
- C.03 Advanced Step Placement:  
LaShawn Penn Bailey in the classification of Paraeducator-3 at Range A-28 Step C

**III. ACTION ITEMS:**

These items are presented for ACTION at this time.

- None

**IV. COMMISSIONER TRAINING/BRIEFING:**

These items are to keep the Commissioners up-to-date with relevant information regarding Personnel Commission procedures and practices.

B.01 Briefing:  
2020-2021 First Interim Fiscal Report

**V. DISCUSSION ITEMS:**

These items are submitted for discussion only. Any action that might be required will generally be scheduled for the next regularly scheduled meeting of the Commission.

- None

**VI. INFORMATION ITEMS:**

These items are placed on the agenda as information and do not require discussion.

- I.01 Open Personnel Requisitions Status Report
- I.02 Filled Personnel Requisitions Status Report
  - None
- I.03 Classified Personnel - Merit Report No. 4.ii. (for SMMUSD School Board Agenda)
  - January 14, 2021
  - February 4, 2021
- I.04 Classified Personnel - Non-Merit Report - No. 4.iii (for SMMUSD School Board Agenda)
  - January 14, 2021
  - February 4, 2021
- I.05 Classified Personnel – Special Services Employees - No. 4.iv (for SMMUSD School Board Agenda)
  - February 4, 2021
- I.06 Personnel Commission’s Twelve-Month Calendar of Events
  - 2020 - 2021
- I.07 Board of Education Meeting Schedule
  - 2020 – 2021

**VII. PERSONNEL COMMISSION BUSINESS:**

B.01 Future Items:

<b>Subject</b>	<b>Action Steps</b>	<b>Tentative Date</b>
Tucker Eligibility	Commissioner Training/ Briefing	April 14, 2021

**VIII. NEXT REGULAR PERSONNEL COMMISSION MEETING:**

Wednesday, March 10, 2021, at 4:30 p.m. – *via Zoom*

**IX. PUBLIC COMMENTS FOR CLOSED SESSION ITEMS ONLY:**

Persons wishing to address the Personnel Commission regarding an item scheduled for closed session must submit the “Request to Address” card prior to the start of closed session.

**X. CLOSED SESSION:**

- No Closed Session

**XI. ADJOURNMENT:**

There being no further business to come before the Personnel Commission, it is recommended that the meeting be adjourned.

Submitted by:



Joshua Kahn  
Secretary to the Personnel Commission  
Director, Classified Personnel

If you wish to receive a full copy of the Personnel Commission Agenda Packet, please contact the Personnel Commission Office at (310) 450-8338, ext. 70-279.



SANTA MONICA-MALIBU UNIFIED SCHOOL DISTRICT

## PERSONNEL COMMISSION MEETING MINUTES

Electronically Recorded (AUDIO ONLY)

**January 13, 2021**

### **PERSONNEL COMMISSIONERS:**

Mrs. Lauren Robinson, Mrs. Maria Stewart, and Mr. Phillip Tate

A regular meeting of the Santa Monica-Malibu Unified School District Personnel Commission was held on **Wednesday, January 13, 2021**, at **4:30 p.m.**, via Zoom.

### ❖ **Instructions on Public Comments:**

Persons wishing to address the Personnel Commission must submit a request to make a public comment by e-mail to [jhatch@smmusd.org](mailto:jhatch@smmusd.org) no later than 5:00 p.m. on Tuesday, January 12, 2021. Please include your full name and the specific agenda item you wish to speak to *or* if you would like to address a non-agenda item if the subject matter is not scheduled on this meeting's agenda.

### **OPEN SESSION**

#### **I. GENERAL FUNCTIONS:**

**G.01 Call to Order: The Open Session of the Regular Meeting of the Personnel Commission was called to order at 4:34 p.m.**

**G.02 Roll Call: Commissioners Robinson, Stewart, and Tate were present.**

**G.03 Pledge of Allegiance: Commissioner Stewart led all in attendance in the Pledge of Allegiance.**

**G.04 Report from Closed Session:**

- None

**G.05 Motion to Approve Agenda: January 13, 2021**  
**It was moved and seconded to approve the agenda as submitted. The motion passed.**

Commissioner	M	S		Yes	No	Abstain	ABSENT
Lauren Robinson				✓			
Maria Stewart	✓			✓			
Phillip Tate		✓		✓			

If you will require an accommodation to participate in the Commission meeting, please notify the Personnel Commission Office at least 48 hours prior to the meeting.

**G.06 Motion to Approve Minutes:** December 9, 2020

It was moved and seconded to approve the minutes as submitted. The motion passed.

Commissioner	M	S		Yes	No	Abstain	ABSENT
Lauren Robinson				✓			
Maria Stewart	✓			✓			
Phillip Tate		✓		✓			

**G.07 Report from the Director of Classified Personnel:**

This is an opportunity for the Director of Classified Personnel to report on items relevant to Personnel Commission.

- General Comments and Updates
  - **Director Kahn updated the Personnel Commission on the Personnel Commission Office operation as staff performs their duties remotely as well as in-person in the Personnel Commission Office based on a set schedule in order to adhere to all District's health safety procedures.**
  - **Director Kahn informed the Personnel Commission about testing that has taken place since the last meeting, including exams for Director, Risk Management and Bus Driver and selection interviews for Paraeducator positions. Sports Facility Attendant and Senior Buyer recruitments were closed.**
  - **Director Kahn updated the Personnel Commission on staff processing EDD unemployment claims and other requests from the EDD Office. Since the last meeting in December, they processed 51 claims. As a point of comparison, only three (3) EDD claims were processed during the same time in 2019.**
  - **Director Kahn reported on the progress of the Personnel Commissioner recruitment. The application accepting process closed on January 11, 2021. There are six (6) candidates who meet the minimum qualifications. The Personnel Commission staff will begin coordinating selection committee comprised of the District, SEIU, and PTA representatives. Director Kahn expressed his gratitude to Commissioner Stewart for her willingness to remain as an interim Commissioner until the end of January. He thanked her for her dedicated service to the Personnel Commission and the District, wishing her all the best in her future endeavors.**

**G.08 Personnel Commissioner Comments/Reports:**

This is a time during which a Personnel Commissioner may make a brief announcement or report on his/her own activities relative to Commission business. This is not a time for discussion.

- **Commissioners Robinson and Tate thanked Commissioner Stewart for her dedication to the District, classified employees, and the Personnel Commission.**
- **Commissioner Stewart expressed her appreciation of working with the Personnel Commission staff, the District, SEIU, and her fellow Commissioners.**



## **G.09 Communications:**

The Communications Section provides an opportunity for the Personnel Commission to hear from the individuals or representatives listed below. All reports are limited to five (5) minutes or less.

- SEIU Report
  - **Mr. Mock, the Chief Steward, expressed his gratitude to Commissioner Stewart for her dedicated service to classified employees.**
  - **Mr. Mock thanked Director Kahn for his expertise, hard work, and thoughtful and thorough process conducting the classification and compensation study for Bilingual Community Liaison constituents.**
  - **Mr. Mock informed the Personnel Commission about resolving a grievance in Food and Nutrition Services.**
  - **Mr. Mock updated the Personnel Commission about the re-hiring process in Child Development Services.**
  - **Mr. Mock informed the Personnel Commission about SEIU's initiatives and role in the District's plan for future school re-opening.**
  - **Mr. Mock updated the Personnel Commission with initiatives of the Special Education, Maintenance and Operations, and Transportation labor management teams to address safety procedures and security protocols in preparation for school re-opening.**
  - **Mr. Mock expressed his gratitude to all District classified employees in these unprecedented times.**

### **Board of Education Report**

- **Dr. Kelly updated the Personnel Commission on the December 17 Board of Education meeting that included a public discussion regarding re-opening plans for SMMUSD schools. The Superintendent brought a recommendation to adopt the distance learning plus (“+”) model in order to meet student and parent interests for academic and also social-emotional experiences on-site/in-person with teachers. Since then the Governor has proposed “Safer Schools for All” plan that seeks to move school districts to re-open campuses for the youngest learners starting in mid-February, following specific criteria related to Covid-19 positivity rate.**
- **Dr. Kelly informed the Personnel Commission about the District submitting a waiver request to resume instruction for grades TK – 2 to the Los Angeles County Office of Education. If approved, this waiver would allow the District to resume in-person/on-site instruction for these grades, even if the Los Angeles County is still in the purple tier.**
- **Dr. Kelly provided information regarding a vaccination plan for employees in education in the B1 priority tier. The Department of Public Health does not mandate that district employees must be vaccinated, but it is highly recommended.**
- **Dr. Kelly notified the Personnel Commission about selection interviews for a new board member that will take place at the Board of Education meeting on January 14, 2021.**
- **Dr. Kelly expressed his gratitude to Commissioner Stewart for her dedicated service to the District.**

#### **G.10 Public Comments:**

Public Comments is the time when members of the audience may address the Personnel Commission on items not scheduled on the meeting's agenda. All speakers are limited to five (5) minutes. When there is a large number of speakers, the Personnel Commission may reduce the allotted time to three (3) minutes per speaker. The Brown Act (Government Code) states that Personnel Commission members may not engage in discussion of issues raised during "Public Comments" except to ask clarifying questions, make a brief announcement, make a brief report on his or her own activities, or to refer the matter to staff.

- **None**

#### **II. CONSENT CALENDAR:**

Items are considered routine, require no discussion, and are normally approved all at once by the Personnel Commission. However, members of the Personnel Commission, staff, or the public may request an item be clarified and/or discussed.

##### **C.01 Approval of Classified Personnel Eligibility List(s):**

###### Classification

###### # Eligibles

Bus Driver	2
Campus Security Officer	5

##### **C.02 Advanced Step Placement:**

Marybel Reyes in the classification of Campus Security Officer at Range A-27 Step C

**It was moved and seconded to approve the Consent Calendar as submitted for the Agenda Items C.01 – C.02. The motion passed.**

<b>Commissioner</b>	<b>M</b>	<b>S</b>	<b>Yes</b>	<b>No</b>	<b>Abstain</b>	<b>ABSENT</b>
Lauren Robinson			✓			
Maria Stewart	✓		✓			
Phillip Tate		✓	✓			

#### **REPORT AND DISCUSSION**

- **None**

#### **III. COMMISSIONER TRAINING/BRIEFING:**

These items are to keep the Commissioners up-to-date with relevant information regarding Personnel Commission procedures and practices.

##### **B.01 Classification Study Briefing: Bilingual Community Liaison**

- **Director Kahn presented a summary of the findings and recommendations of the classification study for Bilingual Community Liaison.**

- Director Kahn provided a background and detailed rationale for his recommendations. The Bilingual Community Liaison's duties were compared with these for Community Liaison and Translator/Interpreter classifications.
- Director Kahn recommended to reallocate Bilingual Community Liaison from range 29 to range 31 on the Classified Salary Schedule. Additionally, he recommended to clarify duties related to consecutive interpretation, in contrast with conducting simultaneous interpretation the Translator/Interpreter classification is responsible for. Lastly, he recommended to increase the Translator/Interpreter classification from range 34 to range 35.

#### IV. **DISCUSSION ITEMS:**

These items are submitted for discussion only. Any action that might be required will generally be scheduled for the next regularly scheduled meeting of the Commission.

##### D.01 Classification Study:

##### Bilingual Community Liaison – Findings & Recommendations

- Commissioner Tate inquired about specific compensation for consecutive and simultaneous interpretations- if it is being based on the District/SEIU Bargaining Agreement.
- Director Kahn explained that the compensation reflects fundamental differences, complexity of duties, and consequence of error for Community Liaison, Bilingual Community Liaison, and Translator/Interpreter in order to adhere to the internal alignment between classifications.
- Mr. Mock stated that this classification study was prompted by a group grievance filed by SEIU to rectify compensation for Bilingual Community Liaison for the scope and complexity of their duties. Its findings and recommendations provided the appropriate solution to this grievance.

#### V. **ACTION ITEMS:**

These items are presented for ACTION at this time.

##### A.01 Classification Revision and Salary Reallocation:

Bilingual Community Liaison within the Instructional Assistant and Paraprofessional Job Unit

**It was moved and seconded to approve the Director's recommendations for Agenda Item III.A.01 as submitted. The motion passed.**

Commissioner	M	S		Yes	No	Abstain	ABSENT
Lauren Robinson				✓			
Maria Stewart	✓			✓			
Phillip Tate		✓		✓			

## **REPORT AND DISCUSSION**

- **Provided in Agenda Item III.B.01 Commissioner Training/Briefing: Classification Study Briefing: Bilingual Community Liaison and Agenda Item IV.D.01 Discussion Items: Classification Study: Bilingual Community Liaison – Findings & Recommendations**
- **Director Kahn stated that further classification revisions are planned as there will be a new recruitment opened to fill a current vacancy.**

A.02 Classification Revision and Salary Reallocation:  
Translator/Interpreter within the Office, Technical, and Business Services Job Unit  
**It was moved and seconded to approve the Director's recommendations for Agenda Item III.A.02 as submitted. The motion passed.**

Commissioner	M	S		Yes	No	Abstain	ABSENT
Lauren Robinson				✓			
Maria Stewart	✓			✓			
Phillip Tate		✓		✓			

## **REPORT AND DISCUSSION**

- **Provided in Agenda Item III.B.01 Commissioner Training/Briefing: Classification Study Briefing: Bilingual Community Liaison and Agenda Item IV.D.01 Discussion Items: Classification Study: Bilingual Community Liaison – Findings & Recommendations**

## **VI. INFORMATION ITEMS:**

These items are placed on the agenda as information and do not require discussion.

- I.01 Open Personnel Requisitions Status Report
- I.02 Filled Personnel Requisitions Status Report
  - None
- I.03 Classified Personnel - Merit Report No. 4.ii. (for SMMUSD School Board Agenda)
  - December 17, 2020
- I.04 Classified Personnel - Non-Merit Report - No. 4.iii (for SMMUSD School Board Agenda)
  - December 17, 2020
- I.05 Personnel Commission's Twelve-Month Calendar of Events
  - 2020 - 2021
- I.06 Board of Education Meeting Schedule
  - 2020 – 2021

**VII. PERSONNEL COMMISSION BUSINESS:**

**B.01 Future Items:**

<b>Subject</b>	<b>Action Steps</b>	<b>Tentative Date</b>
Tucker Eligibility	Commissioner Training/ Briefing	February 10, 2021

**Commissioner Training/Briefing has been postponed until April 14, 2021, when it is expected to have a new Commissioner.**

**VIII. NEXT REGULAR PERSONNEL COMMISSION MEETING:**

Wednesday, February 10, 2021, at 4:30 p.m. – *via Zoom*

**IX. PUBLIC COMMENTS FOR CLOSED SESSION ITEMS ONLY:**

Persons wishing to address the Personnel Commission regarding an item scheduled for closed session must submit the “Request to Address” card prior to the start of the closed session.

- **None**

**X. CLOSED SESSION:**

- **No Closed Session**

**XI. ADJOURNMENT:**

There being no further business to come before the Personnel Commission, it is recommended that the meeting be adjourned.

**It was moved and seconded to adjourn the meeting.**

<b>Commissioner</b>	<b>M</b>	<b>S</b>	<b>Yes</b>	<b>No</b>	<b>Abstain</b>	<b>ABSENT</b>
Lauren Robinson			✓			
Maria Stewart	✓		✓			
Phillip Tate		✓	✓			

**TIME ADJOURNED: 5:32 p.m.**

Submitted by:

\_\_\_\_\_  
Joshua Kahn  
Secretary to the Personnel Commission  
Director, Classified Personnel

If you wish to receive a full copy of the Personnel Commission Agenda Packet, please contact the Personnel Commission Office at (310) 450-8338, ext. 70-279.

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## II. Consent Calendar:

Commissioner	M	S		Yes	No	Abstain	ABSENT
Lauren Robinson							
Phillip Tate							
vacant							



SANTA MONICA-MALIBU UNIFIED SCHOOL DISTRICT

## PERSONNEL COMMISSION

### Regular Meeting: Wednesday, February 10, 2021

#### **AGENDA ITEM NO: II.C.02**

SUBJECT: Advanced Step Placement – Erika Herbrechtsmeier

Hire Date: 1/4/2021

ASP Request Submitted: 1/7/2021

#### **BACKGROUND INFORMATION:**

<b>Classification Title:</b> Physical Activities Specialist	<b>Employee:</b> Erika Herbrechtsmeier	<b>Calculation of Advanced Step Recommendation</b>
<b><u>Education:</u></b> Graduation from high school or equivalent. College level course work or equivalent training in physical education is desirable.	<ul style="list-style-type: none"> <li>Erika Herbrechtsmeier has a Bachelors' degree in Health Sciences</li> </ul>	<b>2</b> level of education above the required level <b>=1 Step Advance</b>
<b><u>Experience:</u></b> One year of paid or volunteer experience working with school aged children or young people in organized group activities, such as those sponsored by a department of parks and recreation, summer camps, YWCA, YMCA, etc.	<ul style="list-style-type: none"> <li>Erika Herbrechtsmeier has over four years of experience working with and coaching school aged children.</li> </ul>	<b>1</b> (2-year periods) of experience above the required level <b>=1 Step Advance</b>
<b><u>Total Advanced Steps: 1 (Education) + 1 (Experience) = 2 Advanced Step = STEP C</u></b>		

#### **DIRECTOR'S COMMENTS:**

Erika's educational and work experience exceed the minimum requirements specified for this classification. Pay rate at salary Range A-28 at Step A is \$17.68/hour, while Step C is \$19.49/hour.

#### **DIRECTOR'S RECOMMENDATION:**

It is recommended that the Personnel Commission approve Advanced Step Placement for Erika Herbrechtsmeier at Range A-28, Step C on the Classified Salary Schedule pursuant to Merit Rule §12.2.4. (B) *Salary on Employment*

Commissioner	M	S		Yes	No	Abstain	ABSENT
Lauren Robinson							
Phillip Tate							
vacant							



SANTA MONICA-MALIBU UNIFIED SCHOOL DISTRICT

## PERSONNEL COMMISSION

### Regular Meeting: Wednesday, February 10, 2021

#### **AGENDA ITEM NO: II.C.03**

SUBJECT: Advanced Step Placement – LaShawn Penn Bailey

Hire Date: 10/26/2020

ASP Request Submitted: 01/13/2021

#### **BACKGROUND INFORMATION:**

<b>Classification Title:</b> Paraeducator-3	<b>Employee:</b> LaShawn Penn Bailey	<b>Calculation of Advanced Step Recommendation</b>
<b><u>Education:</u></b> Must have a high school diploma or its recognized equivalent <u>and</u> <b>ONE</b> of the following: <ul style="list-style-type: none"> <li>Completed 48 units at an institution of higher learning; OR</li> <li>Obtained an Associate's (or higher) degree; OR</li> <li>Have at least one (1) year experience working with individuals with special needs; OR Must pass the District's Instructional Assistant written examination demonstrating knowledge of and the ability to assist in instructing reading readiness, writing readiness and mathematics readiness.</li> </ul>	<ul style="list-style-type: none"> <li>LaShawn Penn Bailey meets education standards.</li> </ul>	<b>0</b> level of education above the required level = <b>0 Step Advance</b>
<b><u>Experience:</u></b> At least six (6) months experience working with individuals with exceptional needs and/or behavioral, social-emotional deficits are required. This experience must be directly related to behavior modification within last five (5) years.	<ul style="list-style-type: none"> <li>LaShawn Penn Bailey has over six (6) years of experience working with students with special needs.</li> </ul>	<b>2</b> (2-year periods) of experience above the required level = <b>2 Step Advance</b> (Max allowed)
<b><u>Total Advanced Steps:</u> 0 (Education) + 2 (Experience) = 2 Advanced Step = STEP C</b>		

#### **DIRECTOR'S COMMENTS:**

Ms. Penn Bailey's work experience exceeds the minimum requirements specified for this classification. Pay rate at salary Range A-28 at Step A is \$17.68/hour, while Step C is \$19.49/hour.

#### **DIRECTOR'S RECOMMENDATION:**

It is recommended that the Personnel Commission approve Advanced Step Placement for LaShawn Penn Bailey at Range A-28, Step C on the Classified Salary Schedule pursuant to Merit Rule §12.2.4. (B) *Salary on Employment.*

<b>Commissioner</b>	<b>M</b>	<b>S</b>		<b>Yes</b>	<b>No</b>	<b>Abstain</b>	<b>ABSENT</b>
Lauren Robinson							
Phillip Tate							
vacant							



#### 12.2.4 SALARY ON EMPLOYMENT

- B. A new employee may request or be recommended for Advanced Step Placement within the first sixty (60) working days during the probationary period. If the new employee is granted Advanced Step Placement, the salary rate shall be retroactive to the date of entry in the classification. The request or recommendation shall be submitted, in writing, to the Director of Classified Personnel. The Advanced Step Placement is subject to the recommendation of the Director of Classified Personnel and approval of the Personnel Commission.

## 16.4 ADVANCED STEP PLACEMENT

A unit member may request or be recommended for Advanced Step Placement within the first sixty (60) working days during the probationary period. If the unit member is granted Advanced Step Placement, the salary rate shall be retroactive to the date of entry into the classification.

16.4.1 Unit members being promoted may be offered advanced step placement upon the supervisor's request. This request shall be supported by at least one of the following criteria:

- a. Unit member was originally hired in an entry level classification in which Advanced Step Placement was not offered; and/or
- b. Recruitment difficulty as evidenced by failure to obtain a rank of three (3) through the testing process, or a lack of qualified applicants as determined by the Director of Classified Personnel.

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### III. Action Items:

Commissioner	M	S		Yes	No	Abstain	ABSENT
Lauren Robinson							
Phillip Tate							
vacant							

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**IV. Commissioner Training/Briefing:**



## **PERSONNEL COMMISSION**

### **Regular Meeting: Wednesday, February 10, 2021**

#### **AGENDA ITEM NO: IV.B.01**

Commissioner Briefing: 2020-21 First Interim Fiscal Report

#### **BACKGROUND INFORMATION:**

A presentation summarizing the district's 1<sup>st</sup> interim report will be delivered by Fiscal and Business Services staff.



SANTA MONICA-MALIBU UNIFIED SCHOOL DISTRICT

# 2020-21 First Interim Report

Gerardo Cruz  
Director of Fiscal  
& Business Services

February 10, 2020  
Personnel Commission Meeting



# SMMUSD 1<sup>st</sup> Interim Report

- Shows the District's financial position as of October 31, 2020
- Displays the Adopted Budget and the First Interim Budget with the change between the two periods
- Includes an analysis of standards and assumptions for financial reporting set by the State
- Analyzes the impact on the Multi-Year Projections of the General Fund for the current and next two fiscal years
- Certifies one of three conditions:
  - Positive, Negative or Qualified



SANTA MONICA-MALIBU UNIFIED SCHOOL DISTRICT

# GENERAL FUND

FUND 01



# 2020-21 First Interim Budget Report

## FUND 01: UNRESTRICTED GENERAL FUND

Object	Description	Adopted Budget 7/1/2020	First Interim Budget 10/31/2020	Changes
	Beginning Fund Balance	22,216,871	22,216,871	
8011-8099	LCFF Revenue	103,802,315	104,515,664	713,349
8100-8299	Federal Revenue	100,000	300,000	200,000
8300-8590	State Revenue	1,832,272	1,867,482	35,210
8600-8799	Local Revenue	41,434,882	41,352,512	(82,370)
8980-8999	Local General Fund Contributions	(31,783,596)	(30,242,378)	1,541,218
	<b>Total Revenue</b>	<b>115,385,873</b>	<b>117,793,280</b>	<b>2,407,407</b>
1000-1999	Certificated Salaries	52,856,734	52,848,028	(8,706)
2000-2999	Classified Salaries	19,879,252	19,470,936	(408,316)
3000-3999	Employee Benefits	31,326,649	31,294,799	(31,850)
4000-4999	Books and Supplies	1,719,709	1,672,404	(47,305)
5000-5999	Services and Other Operating Costs	14,876,832	14,868,582	(8,250)
6000-6999	Capital Outlay	225,000	153,822	(71,178)
7100-7299	Other Outgo	225,000	75,000	(150,000)
7300-7399	Indirect Costs	(1,388,501)	(1,170,043)	218,458
7400-7499	Debt Services	(250,000)	-	
7600-7629	Transfer Out/ Fund 12, 13, 14	3,100,000	3,848,000	748,000
	<b>Total Expenditures</b>	<b>122,570,675</b>	<b>123,061,528</b>	<b>240,853</b>
	Increase /(Decrease) Fund Balance	(7,184,802)	(5,268,248)	1,916,554
	<b>Projected Fund Balance</b>	<b>15,032,069</b>	<b>16,948,623</b>	



# 2020-21 First Interim Budget Report

## Revenues:

\$	713,349	LCFF Revenue - Removal of 10% Reduction to EPA and Minimum State Aid
\$	200,000	Medi-Cal Administrative Activities (MAA) Revenue
\$	35,210	Mandated Cost Reimbursement - Removal of 10% Reduction
\$	(82,370)	Decrease in Local Revenue
		<i>129K Projected decrease in Measure R</i>
		<i>93K Projected decrease in Malibu Joint Use</i>
		<i>68K Increase in SMEF annual giving ('true-up' of 2M to 2.068M)</i>
		<i>172K Increase in Malibu Fundraising</i>
		<i>300K Decrease in TRANS Revenue</i>
		<i>200K Increase in Other Local Income</i>
\$	1,541,218	Decrease in Local General Fund Contribution (LGFC) to Special Education - Increase to Revenue

## Expenditures:

\$	(8,706)	Decrease in Certificated Hourly, Overtime, and Substitute Salaries Due to Covid-19 Closure
\$	(408,316)	Decrease in Classified Hourly, Overtime, and Substitute Salaries Due to Covid-19 Closure
\$	(31,850)	Decrease in Statutory Benefits (-519K) & Increase in Employee Health Benefits (+488K)
\$	(47,305)	Decrease in Books & Supplies to Support Distance Learning - Budget will come from Restricted CARES Funds
\$	(8,250)	Decrease in Services & Operating Costs (legal costs, independent contractors, conf/travel)
		<i>(8,250) Consultants &amp; Other Operating</i>
		<i>9K Decrease in Conference &amp; Travel</i>
		<i>3K Increase in Dues &amp; Memberships</i>
		<i>141K Decrease in Annual Property &amp; Liability Insurance</i>
		<i>36K Increase in Utilities</i>
		<i>246K Decrease Rentals/Leases/Repairs</i>
		<i>351K Increase to contr-account for Inter-fund Transfers</i>
		<i>3K Increase in Other Operating Costs (Maintenance Agmts, Advertising, Memberships, Interfund Transfers, Other)</i>
		<i>94K Increase in Consultants</i>
		<i>100K Decrease in Legal</i>
\$	218,458	Increase in Indirect Charge to Categorical Programs

# 2020-21 First Interim Budget Report

## FUND 01: RESTRICTED GENERAL FUND

Object	Description	Adopted Budget 7/1/2020	First Interim Budget 10/31/2020	Changes
	Beginning Fund Balance	5,631,954	5,631,954	
8100-8299	Federal Revenue	4,061,631	9,944,359	5,882,728
8300-8590	State Revenue	1,240,272	3,079,910	1,839,638
8600-8799	Local Revenue	7,872,617	9,627,828	1,755,211
8980-8999	Local General Fund Contributions	31,783,596	30,242,378	(1,541,218)
	<b>Total Revenue</b>	<b>44,958,116</b>	<b>52,894,475</b>	<b>7,936,359</b>
1000-1999	Certificated Salaries	12,789,739	12,834,392	44,653
2000-2999	Classified Salaries	12,371,052	12,643,940	272,888
3000-3999	Employee Benefits	12,161,873	11,714,820	(447,053)
4000-4999	Books and Supplies	1,551,116	8,326,688	6,775,572
5000-5999	Services and Other Operating Costs	5,714,521	7,029,101	1,314,580
6000-6999	Capital Outlay	45,050	83,501	38,451
7300-7399	Indirect Costs	623,492	741,772	118,280
	<b>Total Expenditures</b>	<b>45,256,843</b>	<b>53,374,214</b>	<b>8,117,371</b>
	Increase /(Decrease) Fund Balance	<b>(298,727)</b>	<b>(479,739)</b>	<b>(181,012)</b>
	<b>Projected Fund Balance</b>	<b>5,333,227</b>	<b>5,152,215</b>	





# 2020-21 First Interim Budget Report

## Revenues:

\$	5,882,728	Increase in Projected Revenue from Title I, II, IV federal programs & CARES Act Covid-19 Funding <i>4.1M Increase in Learning Loss Mitigation Funding (Coronavirus Relief Fund - CR)</i> <i>936K Increase in Elementary &amp; Secondary School Emergency Relief</i> <i>433K Increase in Title I Federal Funds</i> <i>126K Increase in Title II Federal Funds</i> <i>105K Increase in Title IV Federal Funds</i> <i>55K Increase in Carl Perkins Grant</i> <i>45K Increase in Title III Federal Funds</i>
\$	1,839,638	Increase CARES Act Covid-19 Funding <i>795K Increase in Learning Loss Mitigation Funding (State General Fund - GF)</i> <i>274K Increase in Restricted Lottery for Prior Year Carry Over</i> <i>273K Increase in Classified School Employee Summer Assistance Program</i> <i>240K Increase in K-12 Strong Workforce Program</i> <i>205K Increase in Career Technical Education Incentive Grant (CTEIG)</i> <i>175K Increase in SB 117 Covid-19 Funds</i>
\$	1,755,211	Increase in Projected Revenue from PTA, Booster Club, & Gifts
\$	(1,541,218)	Decrease in Local General Fund Contribution (LGFC) to Special Education

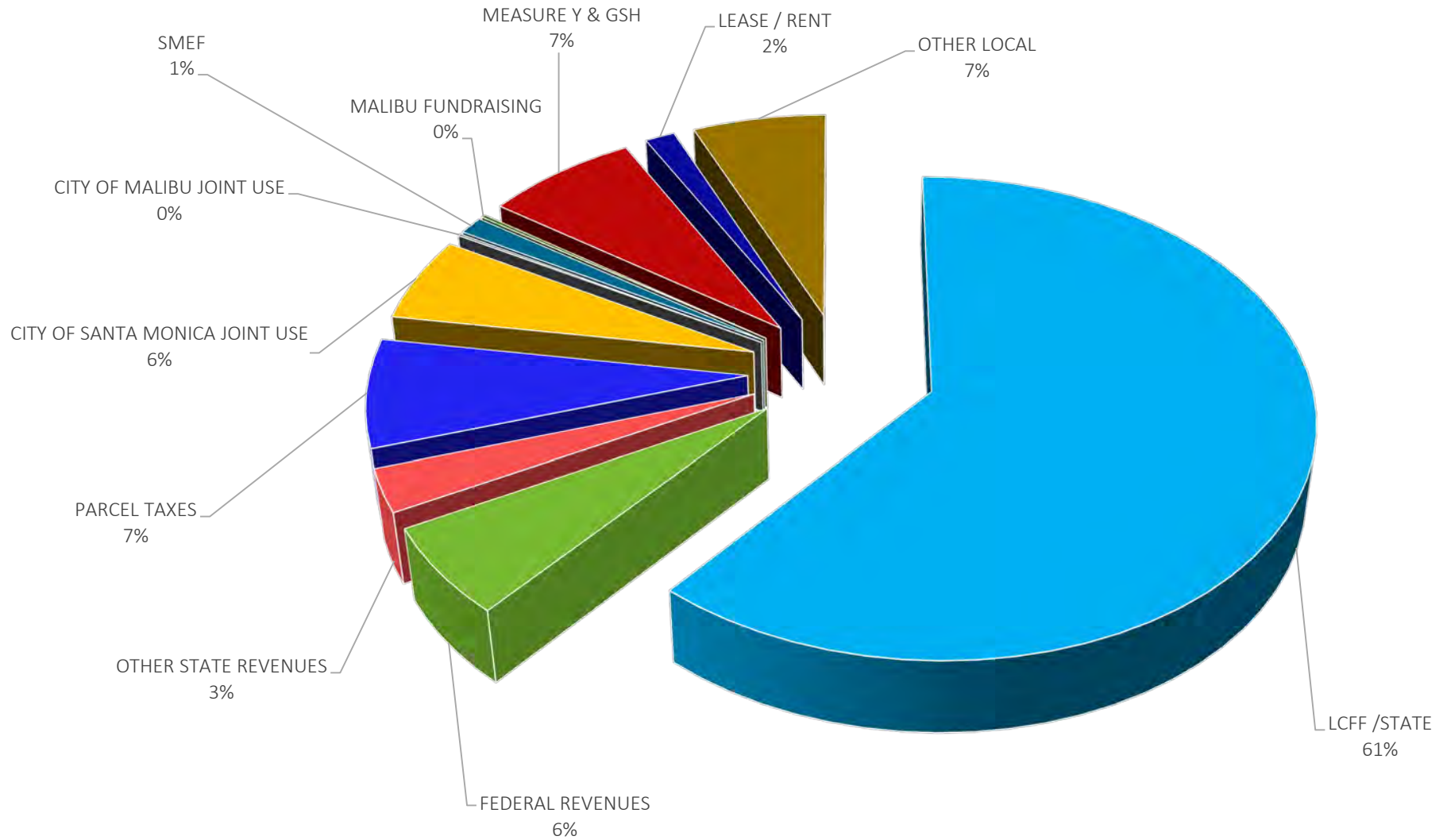
## Expenditures:

\$	44,653	Increase in Certificated Hourly and Substitute Salaries to Support Distance Learning
\$	272,888	Increase in Classified Hourly, Overtime, and Substitute Salaries to Support Distance Learning
\$	(447,053)	Decrease in Statutory Benefits (-409K) & in Employee Health Benefits (-38K)
\$	6,775,572	Increase in Books & Supplies - Items related to Covid-19 per resolution adopted each Board Meeting
\$	1,314,580	Increase in Services & Operating Costs (legal costs, independent contractors, conf/travel) <i>700K Special Education NPS and NPA Contracts</i> <i>400K Education Contractors/Consultants</i> <i>162K Other Operating Costs - Items related to Covid-19 per resolution adopted each Board Meeting</i> <i>52K Increase to Conference &amp; Travel</i>
\$	38,451	Increase in Equipment for CTEIG Program
\$	118,280	Increase in Indirect Costs from various programs

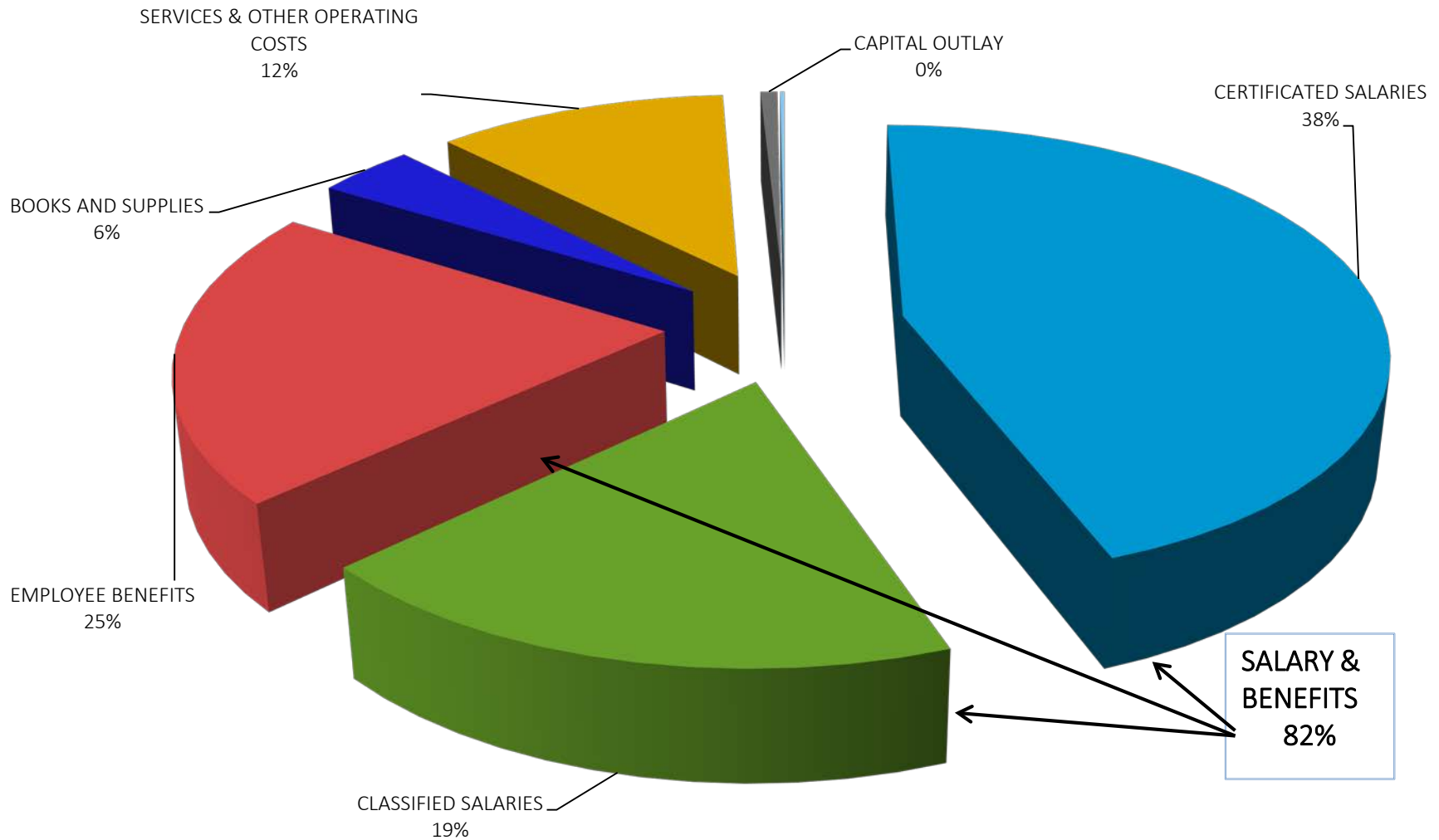
	ESSER	Learning Loss Mitigation Funding (LLMF)			SB 117
		GEER	CR	GF	
<b>Full Name</b>	Elementary and Secondary School Emergency Relief	Governor's Emergency Education Relief	Coronavirus Relief Fund	State General Fund	SB 117 Covid-19 LEA Response Funds
<b>Distribution Formula</b>	Based on Title I, Part A allocation	Based on pupil aged 3-22 counts from 2019-20 Fall 1 CALPADS data	Based on supplemental and concentration grant funding as of 2019-20 second principal apportionment	Based on LCFF Entitlement	Based on ADA for the 2019-20 First Reporting Period
<b>State Allocation</b>	\$1,482,575,514	\$355,227,000	\$4,439,844,000	\$539,936,000	\$100,000,000
<b>SMMUSD + Private School allocation</b>	\$935,547	\$613,655	\$4,103,874	\$795,192	\$175,346
<b>Resource Code</b>	3210	3215	3220	7420	7388
<b>Equitable Services</b>	Yes	Yes	No	No	No
<b>Deadline for expenditures</b>	September 30, 2022	September 30, 2022	December 30, 2020	December 30, 2020	June 30, 2021



## 2020-21 GENERAL FUND (FUND 01) REVENUES



## 2020-21 GENERAL FUND (Fund 01) EXPENDITURES



2020-21 First Interim Budget Report  
As of 10/31/2020

**Components of Ending Fund Balances**

**2020-21**

**Fund 01: Unrestricted General Fund**

Unrestricted General Fund Balance	\$	22,216,871
Current Year Deficit Spending		(5,268,248)
Fund Balance that Requires Explanation		16,948,623

**Reasons for Assigned and Unassigned Ending Fund Balances**

**\*Below State Recommended 17% Minimum Level for Unified Districts**

	16,948,623
Less: 3% Reserve for Economic Uncertainties	(5,293,078)
Reserve for Revolving Cash & Prepaid	(190,362)
Reserve for 20-21 Deficit Spending	-
Reserve for 21-22 Deficit Spending	-
Reserve for 22-23 Deficit Spending	-
^Reserve for up to 2 months General Fund Expenditures	11,465,183
<b>Unappropriated Balance</b>	<b>-</b>

\*current reserve is at 12.48% (up 4.08% from 8.40% @ Budget Adoption 6/25/20)

\*2018-19 Statewide Average Reserve for Unified Districts is 17.26%

^A 2-month reserve would be approximately \$26.8M





# 2020-21 First Interim Budget Report

2020-21 LOCAL CONTROL FUNDING FORMULA (LCFF) CALCULATION					10/31/2020
<b>BASE GRANT</b>					
	TK-3	4-6	7-8	9-12	<b>TOTAL</b>
	2,840.26	2,093.07	1,657.22	3,092.66	9,683.21
2020-21 BASE	7,702	7,818	8,050	9,329	
2020-21 0% COLA	7,702	7,818	8,050	9,329	
	21,875,683	16,363,621	13,340,621	28,851,425	<b>80,431,350</b>
<b>AUGMENTATION GRANTS:</b>					
CSR AUGMENTATION: BASE GRANT X 10.4%					<b>2,275,071</b>
CTE AUGMENTATION 9-12 BASE GRANT X 2.6%					<b>750,137</b>
<b>SUPPLEMENTAL AND CONCENTRATION GRANTS:</b>					
TOTAL ENROLLMENT (3-YEAR AVERAGE)					10,599
TOTAL UNDUPLICATED PUPIL COUNT (3-YEAR AVERAGE)					3,081
					29.07%
<b>SUPPLEMENT ADD-ON 20% OF BASE GRANT X % OF ELIGIBLE ENROLLMENT</b>					<b>4,851,961</b>
<b>TRANSPORTATION AND TIIG GRANT</b>					
2012-13 TRANSPORTATION					820,273
2012-13 TARGETED INSTRUCTIONAL IMPROVEMENT BLOCK GRANT					429,757
<b>TOTAL 2020-21 LCFF ENTITLEMENT</b>					<b>89,558,549</b>
<b>MINIMUM STATE AID / 2012-13 CATEGORICAL PROGRAMS</b>					<b>8,585,843</b>
<b>TOTAL FUNDING LESS: 2012-13 MINIMUM/CATEGORICAL</b>					<b>80,972,706</b>
<b>LOCAL REVENUE / PROPERTY TAXES</b>					<b>94,216,821</b>
<b>Amount of Property Tax Over LCFF Funding (Basic Aid when negative)</b>					<b>(13,244,115)</b>



SANTA MONICA-MALIBU UNIFIED SCHOOL DISTRICT

# OTHER FUNDS

FUNDS

11, 12, 13, 14, 21, 25, 40, 51, 71

# 2020-21 First Interim Budget Report

## FUND 11: ADULT EDUCATION FUND

Object	Description	Adopted Budget 7/1/2020	First Interim Budget 10/31/2020	Changes
	Beginning Fund Balance	851,124	851,124	-
8100-8299	Federal Revenue	37,430	49,935	12,505
8300-8590	Other State Revenue	750,728	728,789	(21,939)
8600-8799	Local Revenue	-	-	-
	<b>Total Revenues</b>	<b>788,158</b>	<b>778,724</b>	<b>(9,434)</b>
1000-1999	Certificated Salaries	306,134	297,711	(8,423)
2000-2999	Classified Salaries	186,811	188,195	1,384
3000-3999	Employee Benefits	193,709	180,742	(12,967)
4000-4999	Books and Supplies	42,946	47,327	4,381
5000-5999	Services and Other Operating Costs	20,552	21,815	1,263
7300-7399	Indirect Costs	38,006	42,934	4,928
	<b>Total Expenditures</b>	<b>788,158</b>	<b>778,724</b>	<b>(9,434)</b>
	Increase /(Decrease) Fund Balance	-	-	-
	<b>Projected Fund Balance</b>	<b>851,124</b>	<b>851,124</b>	



# 2020-21 First Interim Budget Report



## Revenue:

- \$ 12,505 Increase in Federal Adult Education Block Grant
- \$ (21,939) Decrease in State Adult Education Block Grant

## Expenditure:

- \$ (8,423) Decrease in Certificated Hourly and Substitute Salaries Due to Covid-19 Closure
- \$ 1,384 Increase in Classified Hourly, Overtime, and Substitute Salaries to Support Distance Learning
- \$ (12,967) Decrease in Statutory Benefits (-11K) & in Employee Health Benefits (-1K)
- \$ 4,381 Increase in Supplies to Support Distance Learning
- \$ 1,263 Increase in Services & Other Operating Costs to Support Distance Learning



# 2020-21 First Interim Budget Report

## FUND 12: CHILD DEVELOPMENT FUND

Object	Description	Adopted Budget 7/1/2020	First Interim Budget 10/31/2020	Changes
	Beginning Fund Balance	813,848	813,848	-
8100-8299	Federal Revenue	122,174	-	(122,174)
8300-8590	State Revenue	2,995,880	2,370,884	(624,996)
8600-8799	Local Revenue	5,185,108	371,755	(4,813,353)
8900-8929	Interfund Transfer from Fund 01	1,200,000	1,948,000	748,000
	<b>Total Revenues</b>	<b>9,503,162</b>	<b>4,690,639</b>	<b>(4,812,523)</b>
1000-1999	Certificated Salaries	2,774,620	1,574,565	(1,200,055)
2000-2999	Classified Salaries	2,540,652	1,370,256	(1,170,396)
3000-3999	Employee Benefits	2,399,823	1,466,655	(933,168)
4000-4999	Books and Supplies	327,554	112,339	(215,215)
5000-5999	Services and Other Operating Costs	1,033,510	325,237	(708,273)
6000-6999	Capital Outlay	10,000	-	(10,000)
7300-7399	Indirect Costs	560,813	221,095	(339,718)
	<b>Total Expenditures</b>	<b>9,646,972</b>	<b>5,070,147</b>	<b>(4,576,825)</b>
	Increase /(Decrease) Fund Balance	<b>(143,810)</b>	<b>(379,508)</b>	<b>(235,698)</b>
	<b>Projected Fund Balance</b>	<b>670,038</b>	<b>434,340</b>	



# 2020-21 First Interim Budget Report

## Revenues:

- \$ (122,174) Projected Loss in Revenue in Federal Food Program Due to Covid-19 Closure
- \$ (624,996) Projected Loss in State Preschool & Child Care Funding Program Due to Covid-19 Closure
- \$ (4,813,353) Projected Loss in Revenue in Full Fee Program Due to Covid-19 Closure
- \$ 748,000 Additional General Fund Interfund Transfer to Support In-Person Learning 'Hubs' during Covid-19 Closure

## Expenditures:

- \$ (1,200,055) Decrease in Certificated Hourly, Overtime, and Substitute Salaries Due to Covid-19 Closure
- \$ (1,170,396) Decrease in Classified Hourly, Overtime, and Substitute Salaries Due to Covid-19 Closure
- \$ (933,168) Decrease in Corresponding Statutory Benefits (-578K) & Increase in Employee Health Benefits (-355K)
- \$ (215,215) Decrease in Supplies Due to Covid-19 Closure
- \$ (708,273) Decrease in Services and Other Operating Costs Due to Covid-19 Closure
- \$ (10,000) Decrease in Capital Outlay Due to Covid-19 Closure

# 2020-21 First Interim Budget Report

## FUND 13: CAFETERIA SPECIAL FUND

Object	Description	Adopted Budget 7/1/2020	First Interim Budget 10/31/2020	Changes
	Beginning Fund Balance	402,307	402,307	-
8100-8299	Federal Revenue	1,250,000	1,250,000	-
8300-8590	State Revenue	80,000	80,000	-
8600-8799	Local Revenue (Food Sales)	1,260,000	1,260,000	-
8900-8929	Interfund Transfer	900,000	900,000	-
	<b>Total Revenues</b>	<b>3,490,000</b>	<b>3,490,000</b>	<b>-</b>
2000-2999	Classified Salaries	1,601,633	1,598,958	(2,675)
3000-3999	Employee Benefits	737,973	701,669	(36,304)
4000-4999	Books and Supplies	1,179,204	1,179,204	-
5000-5999	Services and Other Operating Costs	(195,000)	(195,000)	-
6000-6999	Capital Outlay	-	-	-
7300-7399	Indirect Costs	166,190	164,242	(1,948)
	<b>Total Expenditures</b>	<b>3,490,000</b>	<b>3,449,073</b>	<b>(40,927)</b>
	Increase /(Decrease) Fund Balance	-	40,927	40,927
	<b>Projected Fund Balance</b>	<b>402,307</b>	<b>443,234</b>	

### Revenue:

No Change Since Budget Adoption

### Expenditures:

\$ (2,675) Decrease in Hourly, Overtime, and Substitute Salaries Due to Serving Less Students

\$ (36,304) Decrease in Corresponding Statutory Benefits (-18K) & Employee Shifts in Health Benefits (-18K)

\$ (1,948) Decrease in Indirect Costs Due to Less Expenditures from Serving Less Students

# 2020-21 First Interim Budget Report

## FUND 14: DEFERRED MAINTENANCE FUND

Object	Description	Adopted Budget 7/1/2020	First Interim Budget 10/31/2020	Changes
	Beginning Fund Balance	797,907	797,907	
8010-8099	LCFF transfer to Fund 14	-	-	-
8600-8799	Local Revenue	5,000	5,000	-
8919	Transfer form General Fund	1,000,000	1,000,000	-
	<b>Total Revenues</b>	<b>1,005,000</b>	<b>1,005,000</b>	<b>-</b>
4000-4999	Books and Supplies	16,000	16,000	-
5000-5999	Services and Other Operating Costs	570,000	570,000	-
6000-6999	Capital Outlay	-	-	-
	<b>Total Expenditures</b>	<b>586,000</b>	<b>586,000</b>	<b>-</b>
	Increase /(Decrease) Fund Balance	<b>419,000</b>	<b>419,000</b>	<b>-</b>
	<b>Projected Fund Balance</b>	<b>1,216,907</b>	<b>1,216,907</b>	

### Revenue:

No Change Since Budget Adoption

### Expenditure:

No Change Since Budget Adoption





# 2020-21 First Interim Budget Report

## \*FUND 21: BUILDING FUND / MEASURE BB, ES, SMS, & M - All Series

Object	Description	Adopted Budget 7/1/2020	First Interim Budget 10/31/2020	Changes
	Beginning Fund Balance	208,013,401	208,013,401	
8600-8799	Local Revenue	700,000	700,000	-
8800-8951	Bond Proceeds - ES Series E	-	-	-
8800-8951	Bond Proceeds - SMS Series A	-	-	-
8800-8951	Bond Proceeds - M Series A	-	-	-
8952-8979	Other Financing	-	-	-
	Total Revenues	700,000	700,000	-
2000-2999	Classified Salaries	829,143	839,449	10,306
3000-3999	Employee Benefits	412,994	431,392	18,398
4000-4999	Books and Supplies	406,200	498,800	92,600
5000-5999	Services and Other Operating Costs	26,599,700	47,895,250	21,295,550
6000-6999	Capital Outlay	116,988,059	132,443,984	15,455,925
	Total Expenditure	145,236,096	182,108,875	36,872,779
	Increase /(Decrease) Fund Balance	(144,536,096)	(181,408,875)	(36,872,779)
	Projected Fund Balance	63,477,305	26,604,526	

\*Budget by Sub-Fund, Measure & Series In First Interim Board Item Attachment



# 2020-21 First Interim Budget Report

## FUND 25: CAPITAL FACILITIES FUND

Object	Description	Adopted Budget 7/1/2020	First Interim Budget 10/31/2020	Changes
	Beginning Fund Balance	4,623,720	4,623,720	
8681	Developer Fees	1,770,000	1,770,000	-
8660	Local Revenue	50,000	50,000	-
	<b>Total Revenues</b>	<b>1,820,000</b>	<b>1,820,000</b>	<b>-</b>
4000-4999	Supplies	-		-
5000-5999	Services and Other Operating Costs	1,693,000	1,693,000	-
6000-6999	Capital Outlay	-	-	-
	<b>Total Expenditures</b>	<b>1,693,000</b>	<b>1,693,000</b>	<b>-</b>
	Increase /(Decrease) Fund Balance	127,000	127,000	-
	<b>Projected Fund Balance</b>	<b>4,750,720</b>	<b>4,750,720</b>	

### Revenue:

No Change Since Budget Adoption

### Expenditure:

No Change Since Budget Adoption



# 2020-21 First Interim Budget Report

## FUND 40: SPECIAL RESERVE FUND FOR CAPITAL OUTLAY

Object	Description	Adopted Budget 7/1/2020	First Interim Budget 10/31/2020	Changes
	Beginning Fund Balance	15,988,916	15,988,916	
8590-8599	State Revenue	-	-	-
8600-8625	Local Revenue	4,000,000	4,000,000	-
8626-8660	Local Revenue (Interest Earned)	150,000	150,000	-
8661-8699	Local Revenue	-		-
	<b>Total Revenues</b>	<b>4,150,000</b>	<b>4,150,000</b>	<b>-</b>
4000-4999	Supplies	21,500	21,500	-
5000-5999	Services and Other Operating Costs	2,010,000	2,010,000	-
6000-6999	Capital Outlay	240,000	240,000	-
7400-7499	COPS Payments	1,875,000	1,875,000	-
	<b>Total Expenditures</b>	<b>4,146,500</b>	<b>4,146,500</b>	<b>-</b>
	<b>Increase /(Decrease) Fund Balance</b>	<b>3,500</b>	<b>3,500</b>	<b>-</b>
	<b>Projected Fund Balance</b>	<b>15,992,416</b>	<b>15,992,416</b>	

### Revenue:

No Change Since Budget Adoption

### Expenditure:

No Change Since Budget Adoption



# 2020-21 First Interim Budget Report

## FUND 51: BOND INTEREST & REDEMPTION FUND

Object	Description	Adopted Budget 7/1/2020	First Interim Budget 10/31/2020	Changes
	Beginning Fund Balance	75,090,637	75,090,637	-
8611-8614	Local Revenue	42,964,911	42,964,911	-
8661-8799	Local Revenue Interest	199,141	199,141	-
	<b>Total Revenues</b>	<b>43,164,052</b>	<b>43,164,052</b>	-
7433	Debt Service - Bond Redemptions	37,733,576	37,733,576	-
7434	Debt Service - Bond Interest & Other Services	30,371,057	30,371,057	-
	<b>Total Expenditures</b>	<b>68,104,633</b>	<b>68,104,633</b>	-
	Increase /(Decrease) Fund Balance	(24,940,581)	(24,940,581)	-
	<b>Projected Fund Balance</b>	<b>50,150,056</b>	<b>50,150,056</b>	-

### Revenue:

No Change Since Budget Adoption

### Expenditure:

No Change Since Budget Adoption



# 2020-21 First Interim Budget Report

## FUND 71: RETIREE BENEFIT FUND FOR OPEB

Object	Description	Adopted Budget 7/1/2020	First Interim Budget 10/31/2020	Changes
	Beginning Fund Balance	8,298,347	8,298,347	
8600-8660	Local Revenue Interest	25,000	25,000	
8661-8799	Local Revenue	1,355,000	1,355,000	
	<b>Total Revenues</b>	<b>1,380,000</b>	<b>1,380,000</b>	-
5000-5999	Services and Other Operating Costs	1,378,000	1,378,000	-
	<b>Total Expenditures</b>	<b>1,378,000</b>	<b>1,378,000</b>	-
	Increase /(Decrease) Fund Balance	2,000	2,000	-
	<b>Projected Fund Balance</b>	<b>8,300,347</b>	<b>8,300,347</b>	

### Revenue:

No Change Since Budget Adoption

### Expenditure:

No Change Since Budget Adoption





# Multi-Year Projection Reflects:

- The District's financial position over the current and next two fiscal years.
- State revenue Cost of Living (COLA) increases over the next three years
  - 0% (2020-21)
  - 0% (2021-22)
  - 0% (2022-23)
- LCFF Gap Fully Funded (100%)
- Student enrollment declining each year and at 9,975 as of CBEDS Day 10/1/2020 for 2020-21





# Multi-Year Projection Reflects:

- Local revenue from Parcel Taxes, Prop Y & GSH, City of Malibu & Santa Monica Joint Uses, Santa Monica Education Foundation, Malibu Fundraising, Leases & Rentals, Other Local Income:
  - \$41.3 million in 2020-21
  - \$41.4 million in 2021-22
  - \$42.2 million in 2022-23
- Employee health & welfare increases of 10% and Step & Column increases of 1.50% each year
- Reserve for Economic Uncertainties at 3%



# Multi-Year Projection Reflects:

- Reserves for future deficit spending offset by Budget Reductions in the form of Fiscal Stabilization Plan
- Reserve for Up To 2 Months of General Fund Expenditures
- Projected Property Tax Increases of 5%
- Does not include potential salary schedule changes as a result of negotiations with SMMCTA, SEIU, or SMMASA



**MULTI-YEAR PROJECTIONS / UNRESTRICTED GENERAL FUND**

	A	B	C	D	E	F
		2020-21	2020-21		2021-22	2022-23
Description		ADOPTED BUDGET	FIRST INTERIM BUDGET	CHANGE	PROJECTED BUDGET	PROJECTED BUDGET
<b>Revenue:</b>						
1 Property Tax		94,216,821	94,216,821	-	98,177,662	102,336,545
2 Education Protection Account (EPA)		1,818,182	2,000,000	181,818	2,000,000	2,000,000
3 LCFF Transfer to Fund 14		-	-	-	-	-
4 LCFF In Lieu Property Tax Transfer to Charter School		(38,000)	(287,000)	(249,000)	(287,000)	(287,000)
5 Prior Year LCFF Adjustment		-	-	-	-	-
6 Minimum State Aid		7,805,312	8,585,843	780,531	8,585,843	8,585,843
7 <b>Subtotal LCFF Funding</b>		<b>103,802,315</b>	<b>104,515,664</b>	<b>713,349</b>	<b>108,476,505</b>	<b>112,635,388</b>



**MULTI-YEAR PROJECTIONS / UNRESTRICTED GENERAL FUND**

	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>	<b>E</b>	<b>F</b>
		2020-21	2020-21		2021-22	2022-23
	Description	ADOPTED BUDGET	FIRST INTERIM BUDGET	CHANGE	PROJECTED BUDGET	PROJECTED BUDGET
8	Other Federal	100,000	300,000	200,000	200,000	200,000
9	Lottery	1,454,545	1,452,482	(2,063)	1,452,482	1,452,482
10	Mandated Reimbursement Block Grant	372,727	410,000	37,273	410,000	410,000
11	One-time Discretionary Funds	-	-	-	-	-
12	Other State Revenue	5,000	5,000	-	5,000	5,000
13	Measure 'R' - Parcel Tax	12,698,211	12,568,316	(129,895)	12,819,682	13,076,076
14	Measure 'Y' & 'GSH' - City of Santa Monica	12,537,500	12,537,500	-	12,537,500	12,537,500
15	Joint Use Agreement - City of Santa Monica	9,799,171	9,799,171	-	9,995,154	10,195,057
16	Joint Use Agreement - City of Malibu	340,000	246,827	(93,173)	246,827	246,827
17	Santa Monica-Malibu Ed Foundation Donation	-	-	-	-	-
18	Santa Monica Ed Foundation Donation	2,000,000	2,068,155	68,155	1,750,000	2,000,000
19	Malibu Fundraising Entity Donation	165,000	337,543	172,543	337,543	337,543
20	Lease & Rental	2,450,000	2,450,000	-	2,450,000	2,450,000
21	Interest Earned	200,000	200,000	-	200,000	200,000
22	Revenue Associated with TRANs Issuance	300,000	-	(300,000)	-	-
23	<i>ORIGINAL ISSUE PREMIUM</i>	<i>150,000</i>	-	(150,000)	-	-
24	<i>PROJECTED INTEREST EARNED</i>	<i>150,000</i>	-	(150,000)	-	-
25	All Other Local Income	945,000	1,145,000	200,000	1,100,000	1,200,000
26	Local General Fund Contribution	(31,783,596)	(30,242,378)	1,541,218	(31,744,225)	(32,379,109)
27	<b>TOTAL REVENUE</b>	<b>115,385,873</b>	<b>117,793,280</b>	<b>2,107,407</b>	<b>120,236,469</b>	<b>124,566,764</b>



MULTI-YEAR PROJECTIONS / UNRESTRICTED GENERAL FUND

	A	B	C	D	E	F
		2020-21	2020-21		2021-22	2022-23
	Description	ADOPTED BUDGET	FIRST INTERIM BUDGET	CHANGE	PROJECTED BUDGET	PROJECTED BUDGET
28	Expenditure:					
29	Certificated Salary	52,856,734	52,848,028	(8,706)	53,640,748	54,445,360
30	Classified	19,879,252	19,470,936	(408,316)	19,763,000	20,059,445
31	Benefits	31,326,649	31,294,799	(31,850)	32,341,567	35,083,039
32	STRS	8,363,812	8,279,952	(83,860)	8,582,520	9,854,610
33	PERS	4,270,291	3,875,558	(394,733)	4,545,490	5,275,634
34	SOCIAL SECURITY & MEDICARE	2,276,234	2,253,491	(22,743)	2,289,660	2,324,005
35	HEALTH AND WELFARE	12,211,627	12,698,884	487,257	12,822,208	13,463,319
36	SUI	36,328	36,163	(165)	36,702	37,252
37	WORKERS COMP	3,055,322	3,049,443	(5,879)	3,082,957	3,129,202
38	OPEB	1,057,804	1,053,352	(4,452)	917,547	931,310
39	CASH IN -LIEU	55,231	47,956	(7,275)	64,483	67,707
40	Supplies/Books/Textbooks	1,719,709	1,672,404	(47,305)	2,000,000	2,000,000
41	Other Operational Costs	14,876,832	14,868,582	(8,250)	14,184,956	14,256,979
42	504 PLAN ACCOMODATION (STUDENT SERVICES)	30,754	30,754	-	30,754	30,754
43	TRAVEL & CONFERENCE	150,944	141,219	(9,725)	160,000	160,000
44	DUES & MEMBERSHIPS	53,795	56,995	3,200	55,400	55,400
45	INSURANCE	1,371,875	1,230,865	(141,010)	1,440,469	1,512,492
46	UTILITIES	3,178,500	3,214,539	36,039	3,200,000	3,200,000
47	RENTALS, LEASES, REPAIRS	2,853,843	2,607,297	(246,546)	2,850,150	2,850,150
48	INTRA-FUND TRANSFERS FOR SERVICES	(39,009)	(59,609)	(20,600)	(32,000)	(32,000)
49	INTER-FUND TRANSFERS FOR SERVICES	(124,084)	248,405	372,489	(125,000)	(125,000)
50	CONSULTANTS & OTHER OPERATING	7,126,404	7,124,307	(2,097)	6,314,968	6,314,968
51	Other Operational Costs	2,185,236	2,188,648	3,412	2,100,000	2,100,000
52	Consultants	2,176,200	2,270,691	94,491	2,200,000	2,200,000
53	Legal	1,000,000	900,000	(100,000)	1,000,000	1,000,000
54	Pupil Fees Lawsuit	750,000	750,000	-	-	-
55	Cost of Early Retirement Incentive (SERP)	1,014,968	1,014,968	-	1,014,968	1,014,968
56	COMMUNICATIONS (LAND & MOBILE)	273,810	273,810	-	290,215	290,215
57	Capital Outlay	225,000	153,822	(71,178)	285,000	285,000
58	Costs Associated with TRANS Issuance	150,000	-	(150,000)	-	-
59	UNDERWRITER'S DISCOUNT	7,815	-	(7,815)	-	-
60	COST OF ISSUANCE	10,185	-	(10,185)	-	-
61	INTEREST DUE	132,000	-	(132,000)	-	-
62	Transfer to County Specialized Schools	75,000	75,000	-	75,000	75,000
63	Indirect	(1,388,501)	(1,170,043)	218,458	(1,200,000)	(1,200,000)
64	Fiscal Stabilization Plan (Budget Reductions)	-	-	-	(3,953,803)	(3,538,060)
65	Malibu Fundraising Entity General Fund Off-Set	(250,000)	-	250,000	-	-
66	GSH Technology Plan/Replacement	-	-	-	-	-
67	Interfund Transfer Out to Fund 12 Child Development	1,000,000	1,748,000	748,000	1,000,000	1,000,000
68	LCAP Transfer Out to Fund 12 Child Development	200,000	200,000	-	200,000	200,000
69	Interfund Transfer Out to Fund 13 Food Services	900,000	900,000	-	900,000	900,000
70	Interfund Transfer Out to Fund 14 Deferred Maint.	1,000,000	1,000,000	-	1,000,000	1,000,000
71	TOTAL EXPENDITURE	122,570,675	123,061,528	298,656	120,236,468	124,566,764

**MULTI-YEAR PROJECTIONS / UNRESTRICTED GENERAL FUND**

	A	B	C	D	E	F
		2020-21	2020-21		2021-22	2022-23
Description		ADOPTED BUDGET	FIRST INTERIM BUDGET	CHANGE	PROJECTED BUDGET	PROJECTED BUDGET
<b>72</b> Increase (Decrease) Fund Balance		(7,184,802)	(5,268,248)	1,916,554	0	0
<b>73</b> Beginning Fund Balance		14,678,938	22,216,871	7,537,933	16,948,623	16,948,624
<b>74</b> Ending Fund Balance (net of lines 72-73)		7,494,136	16,948,623	9,454,488	16,948,624	16,948,624
<b>75</b> Reserve - Revolving Cash, Prep-pays		251,984	190,362	(61,622)	190,362	190,362
<b>76</b> Reserve - SERP Retirement Incentive Pymnt		-	-	-	-	-
<b>77</b> Reserve - Deficit Spending in 20-21		-	-	-	-	-
<b>78</b> Reserve - Deficit Spending in 21-22		-	-	-	-	-
<b>79</b> Reserve - Deficit Spending in 22-23		-	-	-	-	-
<b>80</b> 3% Contingency Reserve		5,188,034	5,293,078	105,044	5,017,845	5,299,490
<b>81</b> Reserve Up to 2-months of Expenses		2,054,118	11,465,183	9,411,066	11,740,417	11,458,772
<b>82</b> Unappropriated Balance		0	0	0	0	0





# 2018-19

## Statewide Average Reserves

2018-19 Average Unrestricted General Fund, Plus Fund 17; Net Ending Balances as a Percentage of Total General Fund Expenditures, Transfers, and Other Uses		Change From Prior ~Year
Elementary School Districts	20.47%	0.28%
High School Districts	15.64%	0.01%
Unified School Districts	17.26%	0.28%
†SMMUSD Reserve (as of 2018-19 Actuals)	13.59%	†(7.85%)
^SMMUSD Reserve (as of 2020-21 First Interim)	12.48%	*4.66%

† Paid back 2017-18 ERAF in 2018-19

^ Lower Expenditures in 2020-21 due to Covid-19 & Additional CARES Funds

\* Compared to 2019-20 First Interim

Source: Statewide Certified Data (School Services of California)

~Compared to reserve levels of 2017-18





# Positive Certification of 1<sup>st</sup> Interim Report

- The District is submitting the 1<sup>st</sup> Interim Report with a **Positive Certification**.
- The District will be able to meet its obligations in the current and next two fiscal years.



# Next Steps

- Receive Board Direction on District Budget Recommendations
- Board Approval of 2020-21 First Interim
- Audit Firm to present March 4, 2021
  - ✓ Final Audit Report for 2019-20

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**V. Discussion Items:**



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**VI. Information Items:**

## Open Requisitions (02/02/21)

## Open Requisitions

Req Number	Req Title	Department	Position Type	FTE
19-188	ADMINISTRATIVE ASSISTANT	SANTA MONICA HIGH SCHOOL	Vac	100
19-206	INSTRUCTIONAL ASSISTANT-CLASSROOM	GRANT ELEMENTARY SCHOOL	Vac	37.5
20-008	SPORTS FACILITY ATTENDANT	BUSINESS SERVICES	New	30
20-013	TRANSLATOR/INTERPRETER	EDUCATIONAL SERVICES	New	100
20-035	TECHNICAL THEATER TECHNICIAN	BUSINESS SERVICES	Vac	50
20-036	TRANSLATOR/INTERPRETER	EDUCATIONAL SERVICES	New	100
20-038	CUSTODIAN	OLYMPIC HIGH SCHOOL	Vac	62.5
20-058	DIRECTOR OF PURCHASING	PURCHASING/WAREHOUSE	Vac	100
20-068	ASSISTANT DIRECTOR-FISCAL SERVICES	FISCAL SERVICES	Vac	100
20-082	GARDENER	M & O (Maintenance & Operations)	Vac	100
20-104	THEATER OPERATIONS SUPERVISOR	BUSINESS SERVICES	Vac	100
20-108	TECHNICAL THEATER TECHNICIAN	BUSINESS SERVICES	Vac	100
20-125	INSTRUCTIONAL ASSISTANT-BILINGUAL (SPANISH)	EDISON LANGUAGE ACADEMY	Vac	43.75
20-140	INSTRUCTIONAL ASSISTANT-CLASSROOM	GRANT ELEMENTARY SCHOOL	Vac	37.5
20-143	INSTRUCTIONAL ASSISTANT-MUSIC	SANTA MONICA HIGH SCHOOL	Vac	37.5
20-152	SENIOR OFFICE SPECIALIST	LINCOLN MIDDLE SCHOOL	Vac	100
20-156	CAMPUS MONITOR	ROOSEVELT ELEMENTARY SCHOOL	Vac	15
20-162	ADMINISTRATIVE ASSISTANT	JOHN MUIR ELEMENTARY SCHOOL	Vac	100
20-163	ADMINISTRATIVE ASSISTANT	M & O (Maintenance & Operations)	Vac	100
20-166	RISK MANAGER	BUSINESS SERVICES	New	100
21-003	BUYER	PURCHASING/WAREHOUSE	Vac	100
21-004	INSTRUCTIONAL ASSISTANT-CLASSROOM	GRANT ELEMENTARY SCHOOL	Vac	37.5
21-009	PARAEDUCATOR-3	LINCOLN CHILD DEVELOPMENT CENTER	Vac	56.25
21-015	CREDENTIAL ANALYST	HUMAN RESOURCES	Vac	100
21-025	INSTRUCTIONAL ASSISTANT-BILINGUAL (SPANISH)	SANTA MONICA HIGH SCHOOL	Vac	43.75
21-026	CAMPUS MONITOR	MCKINLEY ELEMENTARY SCHOOL	Vac	15.63

21-027	CUSTODIAN	SANTA MONICA HIGH SCHOOL	Vac	100
21-028	INSTRUCTIONAL ASSISTANT-CLASSROOM	MCKINLEY ELEMENTARY SCHOOL	Vac	31.25
21-034	CAMPUS MONITOR	JOHN MUIR ELEMENTARY SCHOOL	Vac	18.75
21-035	SPORTS FACILITY ATTENDANT	BUSINESS SERVICES	New	37.5
21-036	SPORTS FACILITY ATTENDANT	BUSINESS SERVICES	New	37.5
21-037	CUSTODIAN	M & O (Maintenance & Operations)	Vac	62.5
21-044	PARAEDUCATOR-1	LINCOLN CHILD DEVELOPMENT CENTER	Vac	50
21-051	INSTRUCTIONAL ASSISTANT-CLASSROOM	WEBSTER ELEMENTARY SCHOOL	Vac	37.5
21-052	PARAEDUCATOR-1	LINCOLN CHILD DEVELOPMENT CENTER	Vac	56.25
21-053	PARAEDUCATOR-3	WEBSTER ELEMENTARY SCHOOL	Vac	75
21-054	BILINGUAL COMMUNITY LIAISON (SPANISH)	EDISON LANGUAGE ACADEMY	Vac	100
21-055	BUS DRIVER	TRANSPORTATION	Vac	87.5
21-056	CHILDREN'S CENTER ASSISTANT-3	CHILD DEVELOPMENT SERVICES	New	43.75

**Filled Requisitions (02/02/21)**

	Req Title	Department	Date of Accepted Job Offer
20-117	BUS DRIVER	TRANSPORTATION	1/22/2021
21-045	CHILDREN'S CENTER ASSISTANT-2	CHILD DEVELOPMENT SERVICES	1/8/2021
21-047	CHILDREN'S CENTER ASSISTANT-2	CHILD DEVELOPMENT SERVICES	1/6/2021
21-048	CHILDREN'S CENTER ASSISTANT-2	CHILD DEVELOPMENT SERVICES	1/6/2021
21-049	CHILDREN'S CENTER ASSISTANT-2	CHILD DEVELOPMENT SERVICES	1/11/2021
21-050	CHILDREN'S CENTER ASSISTANT-2	CHILD DEVELOPMENT SERVICES	1/8/2021

**Classified Personnel – Merit**  
**1/14/21**

**NEW HIRES**

Bieber, Alexandra  
Roosevelt ES

Instructional Assistant-Classroom  
3 Hrs/SY/Range: 20 Step: B

**EFFECTIVE DATE**

12/7/20

**PROMOTION**

Ramos, Asuncion  
Special Ed-CDS-Rogers ES

Paraeducator-1  
4.5 Hrs/SY/Range: 22 Step: F  
From: Children's Center Assistant-3: 3.5 Hrs/SY

**EFFECTIVE DATE**

11/10/20

**CHANGE OF POSITION**

Gutierrez, Yoly  
Edison ES

Elementary Library Coordinator  
7 Hrs/10 Mo/Range: 28 Step: F  
From: Bilingual Community Liaison: 8 Hrs/SY

**EFFECTIVE DATE**

12/1/20

**PROVISIONAL ASSIGNMENTS**

Aspron-Ladesich, Alex  
Malibu MS/HS

Bilingual Community Liaison

**EFFECTIVE DATE**

9/24/20-10/16/20

**LIMITED TERM**

Casey, Brittany  
Child Development Services

Children's Center Assistant-2  
3.5 Hrs/SY/Range: 20 Step: F

**EFFECTIVE DATE**

11/30/20-1/29/21

**TEMP/ADDITIONAL ASSIGNMENTS**

Castillo, John  
Information Services

Network Engineer  
[overtime; distance learning support]

**EFFECTIVE DATE**

8/15/20-6/30/21

Dominguez-Morales, Yanet  
Information Services

Senior Technology Support Assistant  
[overtime; distance learning support]

8/15/20-6/30/21

Flores, Nancy  
Student Services

Health Office Specialist  
[additional hours; District health office support]

11/24/20-6/19/21

Gomez, Rodolfo  
Information Services

Computer Operator  
[overtime; distance learning support]

8/15/20-6/30/21

Itomura, Terrie  
Information Services

Computer Operator  
[overtime; distance learning support]

8/15/20-6/30/21

Magallanes, Joy  
Information Services

Systems Analyst  
[overtime; distance learning support]

8/15/20-6/30/21

Manzur, Juan  
Information Services

Senior Technology Support Assistant  
[overtime; distance learning support]

8/15/20-6/30/21

Marmolejo, David  
Information Services

Network Engineer  
[overtime; distance learning support]

8/15/20-6/30/21

Stanton, Kevin Dean  
Information Services

Computer Operator  
[overtime; distance learning support]

8/15/20-6/30/21

**SUBSTITUTES**

		<b><u>EFFECTIVE DATE</u></b>
Avalos, Marlen Muir ES	Senior Office Specialist	10/1/20-3/31/21
Monroe, Lisa Special Education	Paraeducator-1	12/1/20-6/11/21
Morton, Amy Special Education	Paraeducator-1	12/10/20-6/11/21
Osanitsch, Gregory Special Education	Paraeducator-1	11/24/20-6/11/21
Richardson, Anthony Operations	Custodian	11/4/20-6/30/21
Wilson, Terry Operations	Custodian	11/4/20-6/30/21

**PROFESSIONAL GROWTH**

		<b><u>EFFECTIVE DATE</u></b>
Bilotti, Scott Special Ed-Malibu HS	Paraeducator-1	1/1/21
Friedman, Talia Special Education	Occupational Therapist	1/1/21
Gonzalez, Gary Maintenance	Plumber	1/1/21
Johnson, Kerri Special Ed-Roosevelt ES	Paraeducator-3	1/1/21
Kramer, Quinton Special Ed-Malibu HS	Paraeducator-1	1/1/21
Sinai, Farimah Facility Use	Accounting Assistant II	1/1/21

**CHANGE IN ASSIGNMENT**

		<b><u>EFFECTIVE DATE</u></b>
Gutierrez, Cindy Grant/McKinley ES	Health Office Specialist 6 Hrs/SY From: 3.5 Hrs/SY/Grant/McKinley ES	11/12/20

**LEAVE OF ABSENCE (PAID)**

		<b><u>EFFECTIVE DATE</u></b>
Abramson, Neal Transportation	Director of Transportation FFCRA	11/16/20-12/2/20
Baxter, Isaac Facility Use	Swimming Instructor/Lifeguard Medical/FMLA/CFRA	11/21/20-12/18/20
Carrillo, Steven Transportation	Transportation Supervisor FFCRA	11/18/20-11/25/20
Coleman, Daniel Franklin ES	Physical Activities Specialist Medical/FMLA/CFRA	12/2/20-6/1/21

Dixon, Gregory Special Ed-Muir ES	Paraeducator-3 FFCRA	11/20/20-11/30/20
Dixon, Guadalupe Malibu HS	Bilingual Community Liaison FFCRA	11/14/20-12/1/20
Dixon, Guadalupe Malibu HS	Bilingual Community Liaison Medical	12/2/20-12/4/20
Frazier, Jeffrey Operations	Plant Supervisor Medical/FMLA/CFRA	12/16/20-1/25/21
Kachurka, Sabrina FNS-Santa Monica HS	Cafeteria Worker II FFCRA	11/19/20-12/4/20
Patterson, Pete Information Services	Technology Support Assistant FFCRA	12/1/20-12/14/20
Peters, Lakisha Special Ed-Franklin ES	Paraeducator-1 FFCRA	11/27/20-12/10/20
Quintana, Anthony Operations-Malibu ES	Custodian FFCRA	12/7/20-12/31/20
Vargas, Marlyn Special Ed-Webster ES	Paraeducator-1 Medical	11/19/20-11/25/20
Vargas, Marlyn Special Ed-Webster ES	Paraeducator-1 FFCRA	11/30/20-12/13/20
Vielman Hernandez, Miriam FNS-Santa Monica HS	Cafeteria Worker I FFCRA	12/7/20-12/18/20

**LEAVE OF ABSENCE (UNPAID)**

Muhammed, Fatimoh Santa Monica HS	Campus Security Officer Personal	<b><u>EFFECTIVE DATE</u></b> 11/29/20-1/26/21
Quintana, Anthony Operations-Malibu ES	Custodian Personal	1/4/21-1/8/21
Vasquez, Erin FNS-Santa Monica HS	Cafeteria Cook/Baker Personal	12/7/20-12/11/20

**WORKING OUT OF CLASS**

Navarro, Nancy Muir ES	Administrative Assistant From: Senior Office Specialist	<b><u>EFFECTIVE DATE</u></b> 10/1/20-3/31/21
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**SUSPENSION WITHOUT PAY**

TE1038594 Transportation	Bus Driver	<b><u>EFFECTIVE DATE</u></b> 12/16/20;12/17/20;12/18/20 1/4/21;1/5/21;1/6/21;1/7/21
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**RESIGNATION**

Hernandez, Yolanda Webster ES	Campus Monitor	<b><u>EFFECTIVE DATE</u></b> 11/24/20
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**Classified Personnel – Merit  
2/4/21**

**NEW HIRES**

		<b><u>EFFECTIVE DATE</u></b>
Becherer, Gretchen McKinley ES	Elementary Library Coordinator 7 Hrs/10 Mo/Range: 20 Step: F	1/19/21
Bersche, Haley Grant ES	Instructional Assistant-Classroom 3 Hrs/SY/Range: 20 Step: B	1/4/21
Chiang, Faline Grant ES	Instructional Assistant-Classroom 3 Hrs/SY/Range: 20 Step: B	1/4/21
Gomez, Aida Rogers ES	Instructional Assistant-Classroom 3 Hrs/SY/Range: 20 Step: F	1/19/21
Herbrechtsmeier, Erika Muir ES	Physical Activities Specialist 3 Hrs/SY/Range: 28 Step: A	1/4/21
Moton, Amy Special Ed-Lincoln MS	Paraeducator-1 6 Hrs/SY/Range: 22 Step: A	1/7/21
Pedroza, Lorena Grant ES	Instructional Assistant-Classroom 3 Hrs/SY/Range: 20 Step: B	1/20/21

**PROMOTION**

		<b><u>EFFECTIVE DATE</u></b>
Peters, Lakisha Special Ed-Franklin ES	Paraeducator-3 6 Hrs/SY/Range: 28 Step: A From: Paraeducator-1: 6 Hrs/SY	1/4/21

**LIMITED TERM/ADDITIONAL ASSIGNMENTS**

		<b><u>EFFECTIVE DATE</u></b>
Arriaga, Jennifer Child Development Services	Children's Center Assistant-2 Not to exceed: 50 Hrs	12/1/20-1/29/21
Carbajal, Patricia Child Development Services	Children's Center Assistant-2 Not to exceed: 50 Hrs	12/1/20-1/29/21
Casey, Brittany Child Development Services	Children's Center Assistant-2 Not to exceed: 120 Hrs	12/1/20-1/29/21

**TEMP/ADDITIONAL ASSIGNMENTS**

		<b><u>EFFECTIVE DATE</u></b>
Bacich, Nicholas Grant ES	Instructional Assistant - Classroom [additional hours; student supplies pickup]	8/21/20
Cooper, Raymond Santa Monica HS	Campus Security Officer [overtime; school security]	8/24/20-6/30/21
Cornejo, Natalie Santa Monica HS	Campus Security Officer [overtime; school security]	8/24/20-6/30/21
Friedman, Talia Special Education	Occupational Therapist [overtime; assessments & consultations]	10/1/20-6/11/21
Jelks, Curtis Santa Monica HS	Campus Security Officer [overtime; school security]	8/24/20-6/30/21



Jones, Chancy Santa Monica HS	Campus Security Officer [overtime; school security]	8/24/20-6/30/21
Kyle, Yvonne Educational Services	Senior Administrative Assistant [overtime; LCAP DCC meeting support]	9/9/20-6/30/21
Mangum, Don Santa Monica HS	Campus Security Officer [overtime; school security]	8/24/20-6/30/21
Miller, Melvyn Santa Monica HS	Campus Security Officer [overtime; school security]	8/24/20-6/30/21
Niederberger-Beekman, Jenelle Adams MS	Senior Office Specialist [additional hours; clerical support]	8/24/20-6/11/21
Smith, Dunell Santa Monica HS	Campus Security Officer [overtime; school security]	8/24/20-6/30/21
Taylor, Inelle Santa Monica HS	Campus Security Officer [overtime; school security]	8/24/20-6/30/21
Uliantzeff, Elena Special Education	Bilingual Community Liaison [overtime; IEP interpretation]	9/18/20
Vasquez, Graciela Santa Monica HS	Campus Security Officer [overtime; school security]	8/24/20-6/30/21
Walker, LaShaun Educational Services	Education Data Specialist [overtime; CALPAD reporting]	5/19/20-6/30/20
White, Paula Rogers ES	Campus Monitor [additional hours; classroom support]	11/2/20-6/11/21
Wilson, Stanley Santa Monica HS	Campus Security Officer [overtime; school security]	8/24/20-6/30/21
Wolfe, Petra Educational Services	Elementary Library Coordinator [additional hours; teacher support]	9/21/20-9/22/20
<b><u>SUBSTITUTES</u></b>		<b><u>EFFECTIVE DATE</u></b>
Larkin, Amy Special Education	Paraeducator-1	1/7/21-6/11/21
Lyons, Debra Adams MS	Health Office Specialist	8/24/20-6/11/21
<b><u>PROFESSIONAL GROWTH</u></b>		<b><u>EFFECTIVE DATE</u></b>
Batmunh, Otgonbayar Maintenance	Electrician	1/1/21
Harris, Kenneth Operations	Custodian	2/1/21
Wilson, Terry Lincoln MS	Campus Security Officer	2/1/21

**CHANGE IN ASSIGNMENT**Hernandez, Edlin  
Webster ESCampus Monitor  
2 Hrs/SY  
From: 1.5 Hrs/SY/Webster ES**EFFECTIVE DATE**

1/4/21

**LEAVE OF ABSENCE (PAID)**Baxter, Isaac  
Facility UseSwimming Instructor/Lifeguard  
Medical/FMLA/CFRA**EFFECTIVE DATE**

12/21/20-1/5/21

Brooks, Victor  
Special Ed-Franklin ESParaeducator-1  
Personal

12/9/20-12/18/20

Bryan, Annette  
Special Ed-Santa Monica HSParaeducator-3  
FFCRA

12/9/20-12/18/20

Buchanan, Timothy  
Operations-Santa Monica HSCustodian  
COVID-19 Pandemic-Related

1/3/21-1/14/21

Burdick, Barton  
GroundsEquipment Operator/Sports Facilities  
Medical/FMLA/CFRA

12/10/20-1/31/21

Davis, Jeffery  
MaintenanceCarpenter  
FFCRA

12/16/20-12/30/20

Etchison, Chauncey  
Operations-Adams MSCustodian  
FFCRA

12/9/20-12/23/20

Gevorkyan, Art  
TransportationLead Vehicle and Equipment Mechanic  
FFCRA

11/30/20-12/11/20

Hatcher, Crystal  
Special Ed-Rogers ESParaeducator-2  
COVID-19 Pandemic-Related

12/29/20-1/11/21

Hernandez, Patricia  
Lincoln MSSenior Office Specialist  
FMLA (Intermittent)

8/17/20-6/14/21

Isaac, Arthur  
OperationsCustodian  
FFCRA

12/3/20-12/16/20

Jackson, Latasha  
Special Ed-Lincoln MSParaeducator-2  
FFCRA

12/4/20-12/31/20

Kubicz-Preis, Anna  
SMASHAdministrative Assistant  
Medical/FMLA/CFRA

12/7/20-12/11/20

Lyles, Michelle  
Special Ed-Santa Monica HSParaeducator-3  
FFCRA

12/7/20-12/18/20

Montes, Linda  
Special Ed-Muir ESParaeducator-3  
CFRA

1/4/21-3/26/21

Ochoa, Alberto  
GroundsGardener  
COVID-19 Pandemic-Related

1/1/21-1/11/21

Pegue, Forrest  
TransportationBus Driver  
Medical

1/1/21-3/1/21

Preciado, Edwin Special Ed-Adams MS	Paraeducator-3 FFCRA	12/9/20-12/22/20
Rodriguez, Maria Operations-Grant ES	Custodian Medical/FMLA/CFRA	12/3/20-12/28/20
Rodriguez, Sara Special Ed-Rogers ES	Paraeducator-1 COVID-19 Pandemic-Related	12/30/20-1/9/21
Serna, Maria Fiscal Services	Senior Administrative Assistant COVID-19 Pandemic-Related	1/4/21-1/15/21
Suaste, Eduardo Operations-Malibu HS	Lead Custodian COVID-19 Pandemic-Related	1/2/21-1/12/21
Tirado, Fortino Grounds	Equipment Operator FFCRA	12/7/20-12/11/20
Vigoren, Jeanne Special Education	Occupational Therapist Pregnancy Disability/Maternity/FMLA	1/5/21-2/16/21
Watson, Natasha Special Education	Workability Assistant COVID-19 Pandemic-Related	1/4/21-1/15/21

**LEAVE OF ABSENCE (UNPAID)**

Baxter, Isaac Facility Use	Swimming Instructor/Lifeguard Personal	<b><u>EFFECTIVE DATE</u></b> 1/5/21-2/15/21
Gudiel Ruano, Ana Special Ed-Roosevelt ES	Paraeducator-1 Personal	12/9/20-6/11/21
Sullivan, Brianna Grant ES	Instructional Assistant-Classroom Personal	11/2/20-12/18/20

**APPOINTMENT OF COMMISSIONER-EXTENSION**

Stewart, Maria Personnel Commission	Personnel Commissioner	<b><u>EFFECTIVE DATE</u></b> 12/1/20-1/31/21
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**ABOLISHMENT OF POSITION**

Children's Center Assistant-2 3.5 Hrs/SY/CDS-Adams MS	<b><u>EFFECTIVE DATE</u></b> 9/18/20
Children's Center Assistant-2 3.5 Hrs/SY/CDS-Grant ES	9/18/20
Children's Center Assistant-2 3.5 Hrs/SY/CDS-Roosevelt ES	9/18/20
Children's Center Assistant-2 3.5 Hrs/SY/CDS-Washington West	9/18/20
Children's Center Assistant-2 3.5 Hrs/SY/CDS-Webster ES	9/18/20
Office Specialist 8 Hrs/12 Mo/Human Resources	9/30/20

Paraeducator-1 4 Hrs/SY/Special Ed-Adams MS	8/24/20
Paraeducator-1 6 Hrs/SY/Special Ed-Adams MS	8/24/20
Paraeducator-1 6 Hrs/SY/Special Ed-Grant ES	8/24/20
Paraeducator-1 6 Hrs/SY/Special Ed-Malibu HS	8/24/20
Paraeducator-1 6 Hrs/SY/Special Ed-Malibu HS	8/24/20
Paraeducator-1 6 Hrs/SY/Special Ed-Malibu HS	8/24/20
Paraeducator-1 4.5 Hrs/SY/Special Ed-Muir ES	8/24/20
Paraeducator-1 6 Hrs/SY/Special Ed-Rogers ES	8/24/20
Paraeducator-1 6 Hrs/SY/Special Ed-Santa Monica HS	8/24/20
Paraeducator-2 7.5 Hrs/SY/Special Ed-Lincoln MS	8/24/20
Paraeducator-3 6 Hrs/SY/Special Ed-Franklin ES	8/24/20
Paraeducator-3 6 Hrs/SY/Special Ed-Franklin ES	8/24/20
Paraeducator-3 6 Hrs/SY/Special Ed-Grant ES	8/24/20

**RESIGNATION**

Anzoleaga, Eleazar  
Special Ed-Webster ES

Paraeducator-3

**EFFECTIVE DATE**

1/1/21

Clonts, Christopher  
Business Services/Facility Improvement Projects

Communications Specialist

1/8/21

Johnson, Hilary  
Special Ed-Lincoln MS

Paraeducator-1

12/31/20

Sanburg, Garland  
Special Ed-Adams MS

Paraeducator-3

1/29/21

**RETIREMENT**

Davis, Kenrick  
Transportation

Bus Driver

**EFFECTIVE DATE**

1/30/21

**Classified Personnel – Non-Merit**  
**1/14/21**

**TECHNICAL SPECIALIST – LEVEL III**

Strand-Polyak, Lindsey	Santa Monica HS [Viola Instructor-Orchestra] - Funding: Santa Monica Arts Parents Association	8/31/20-6/11/21
Tyler, Charles	Santa Monica HS [Cello Instructor-Orchestra] - Funding: Santa Monica Arts Parents Association	8/31/20-6/11/21

**Classified Personnel – Non-Merit**  
**2/4/21**

**COACHING ASSISTANT**

Burdick, Bart	Santa Monica HS	8/24/20-6/11/21
Campbell, Leigh	Santa Monica HS	8/24/20-6/11/21

**ADMINISTRATIVE SPECIALIST – LEVEL II**

Gittleman, Marni	Santa Monica Alternative School House [Art Coordinator] - Funding: Formula & Old Tier III	9/3/20-6/11/21
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**TECHNICAL SPECIALIST – LEVEL II**

Ostrovsky, Julianna	Santa Monica Alternative School House [Visual Art Instructor] - Funding: VSS: Stretch Grant	2/1/21-5/31/21
Pace, Kristy	Santa Monica Alternative School House [Drama Instructor] - Funding: VSS: Stretch Grant	2/1/21-5/31/21

**TECHNICAL SPECIALIST – LEVEL III**

Aliabadi, Sogol	Santa Monica HS [Viola Instructor-Orchestra] - Funding: Santa Monica Arts Parents Association	10/19/20-6/11/21
Ciang, Fuchou	Adams MS [Music Clinician] - Funding: Formula & Old Tier III	8/24/20-6/11/21
Parise, Christopher	Adams MS [Music Clinician] - Funding: Formula & Old Tier III	8/24/20-6/11/21
Rettig, Elizabeth	Adams MS [Music Clinician] - Funding: Formula & Old Tier III	8/24/20-6/11/21

**Classified Personnel – Special Services Employees**  
**2/4/21**

<u>Name/Location</u>	<u>Not to Exceed</u>	<u>Effective Dates</u>	<u>Rate</u>
Carson, Carrieann	\$5000	11/3/20-6/30/21	\$162/day
Gubbins, Sarah	\$5000	11/3/20-6/30/21	\$162/day
McElvain, Naomi	\$5000	11/3/20-6/30/21	\$162/day
Parsa, Theresa	\$5000	11/3/20-6/30/21	\$162/day
Sanchez-Rivera, Kimberly	\$5000	11/3/20-6/30/21	\$162/day
Smith, Lorraine	\$5000	11/3/20-6/30/21	\$162/day

Health/Student Services; substitute Nursing services	
FUNDING: 01-00000-0-11100-31400-2917-041-1501	-100%
Unrestricted Resource	

MOTION MADE BY:  
SECONDED BY:  
STUDENT ADVISORY VOTE:  
AYES:  
NOES:



**SANTA MONICA – MALIBU UNIFIED SCHOOL DISTRICT  
PERSONNEL COMMISSION  
MEETING CALENDAR  
2020 – 2021**

<b>Date</b>	<b>Time</b>	<b>Location</b>	<b>Notes</b>
<b>2020</b>			
July 8, 2020	4:30 p.m.	Zoom	
August 11, 2020	4:30 p.m.	Zoom	
September 9, 2020	4:30 p.m.	Zoom	
October 14, 2020	4:30 p.m.	Zoom	
<b>November 10, 2020</b>	<b>4:30 p.m.</b>	<b>Zoom</b>	<b>Moved to Tuesday due to Veteran's Day</b>
December 9, 2020	4:30 p.m.	Zoom	
<b>2021</b>			
January 13, 2021	4:30 p.m.	Zoom	
February 10, 2021	4:30 p.m.	Zoom	
March 10, 2021	4:30 p.m.	Zoom	
April 14, 2021	4:30 p.m.	Zoom	Budget – First Reading
May 12, 2021	4:30 p.m.	Board Room – District Office	Budget – Public Hearing and Adoption
June 9, 2021	4:30 p.m.	Board Room – District Office	



## School Board Meetings: 2020-2021

Thurs., July 16, 2020 District Office Hybrid  
Thurs., August 13, 2020 District Office A  
Tues., August 25, 2020 District Office Special Meeting  
Thurs., September 3, 2020 District Office A  
Thurs., September 17, 2020 District Office B  
Thurs., October 1, 2020 Malibu A  
Thurs., October 15, 2020 District Office B  
Thurs., November 5, 2020 Malibu A  
Tues., November 17, 2020 District Office Special Meeting  
Thurs., November 19, 2020 District Office B  
Thurs., December 10, 2020 District Office Hybrid  
Thurs., January 14, 2021 District Office Hybrid  
Tues., January 21, 2021 District Office Special Meeting  
Thurs., February 4, 2021 Malibu A  
Thurs., February 18, 2021 District Office B  
Thurs., March 4, 2021 District Office A  
Weds., March 17, 2021 Malibu B  
Weds., March 24, 2021 District Office Special Meeting  
Thurs., April 22, 2021 District Office Hybrid  
Thurs., May 6, 2021 Malibu A  
Thurs., May 20, 2021 District Office B  
Thurs., June 3, 2021 District Office A  
Thurs., June 17, 2021 District Office Special Meeting  
Thurs., June 24, 2021 District Office B

### Meeting Format Structures:

#### Meeting "A"

1. Closed Session
2. Commendations/Recognitions
3. Study Session
4. Communications
5. Executive Staff Reports
6. Consent Calendar
7. General Public Comments (max. 30 minutes)
8. Discussion Items (as needed)
9. Major Items
10. Continuation of General Public Comments (if needed)

#### Meeting "B"

1. Closed Session
2. Consent Calendar
3. Study Session

4. Discussion Items
5. Major Items (as needed)
6. General Public Comments

**Hybrid of "A" and "B"**

1. Closed Session
2. Commendations/Recognitions
3. Study Session
4. Communications
5. Executive Staff Reports
6. Consent Calendar
7. General Public Comments (max. 30 minutes)
8. Discussion Items
9. Major Items
10. Continuation of General Public Comments (if needed)

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## **VII. Personnel Commission Business:**

### **A. Future Items:**

<b>Subject</b>	<b>Action Steps</b>	<b>Tentative Date</b>
Tucker Eligibility	Commissioner Training/Briefing	April 14, 2021

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**VIII. Next Regular Personnel Commission Meeting:**

Wednesday, March 10, 2021, at 4:30 pm, *via Zoom*

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**IX. Public Comments for Closed Session Items Only:**

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## **X. Closed Session:**

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**XI. Adjournment:**