

**WESTERN PLACER UNIFIED SCHOOL DISTRICT**  
**600 SIXTH STREET, SUITE 400,**  
**LINCOLN, CALIFORNIA 95648**  
**Phone: 916.645.6350 Fax: 916.645.6356**

**MEMBERS OF THE GOVERNING BOARD**

Kris Wyatt - President  
 Brian Haley - Vice President  
 Damian Armitage - Clerk  
 Paul Long - Member  
 Paul Carras - Member

**DISTRICT ADMINISTRATION**

Scott Leaman, Superintendent  
 Mary Boyle, Deputy Superintendent of Educational Services  
 Audrey Kilpatrick, Assistant Superintendent of Business & Operation

<b>School</b>	<b><u>STUDENT ENROLLMENT</u></b>		
	<b>2012/13 CEBEDS</b>	<b>5/1/2013</b>	<b>6/1/2013</b>
Sheridan Elementary (K-5)	84	89	89
First Street Elementary (K-5)	465	462	462
Carlin C. Coppin Elementary (K-5)	412	414	412
Creekside Oaks Elementary (K-5)	559	605	601
Twelve Bridges Elementary (K-5)	717	722	720
Foskett Ranch Elementary (K-5)	552	545	544
Lincoln Crossing Elementary (K-5)	684	683	680
Glen Edwards Middle School (6-8)	686	679	677
Twelve Bridges Middle School (6-8)	853	872	869
Lincoln High School (9-12)	1,516	1,451	1,443
Phoenix High School (10-12)	65	61	49
<b>TOTAL</b>	<b>6593</b>	<b>6583</b>	<b>6546</b>

**State Preschool**

First & L Street 24 A.M. /24 P.M.  
 Carlin Coppin 24 A.M.

**Pre-K/Special Ed**

Foskett 23  
 FSS PPPIP 82  
 CCC 0

**Adult Education** 85

**First-5 Program**

First Street 22 A.M. /21 P.M.  
 Sheridan 14 A.M. /14 P.M.

**GLOBAL DISTRICT GOALS**

- Develop and continually upgrade a well articulated K-12 academic program that challenges all students to achieve their highest potential.
- Foster a safe, caring environment where individual differences are valued and respected.
- Provide facilities for all district programs and functions that are suitable in terms of function, space, cleanliness and attractiveness.
- Promote the involvement of the community, local government, business, service organizations, etc. as partners in the education of our students.
- Promote student health and nutrition in order to enhance readiness for learning.

Western Placer Unified School District  
**Regular Meeting of the Board of Trustees**  
August 20, 2013, 7:00 P.M.  
Lincoln High School, Multi-Purpose Room  
790 J Street, Lincoln, CA 95648

## **AGENDA**

**2013-2014 Goals & Objectives (G & O) for the Management Team:** Component I: Quality Student Performance; Component II: Curriculum Themes; Component III: Special Student Services; Component IV: Staff & Community Relations; Component V: Facilities/Administration/Budget.

All Open Session Agenda related documents are available to the public for viewing at the Western Placer Unified School District Office located at 600 Sixth Street, Fourth Floor in Lincoln, CA 95648.

### **6:00 P.M. START**

1. **CALL TO ORDER** – Lincoln High School – Performing Arts Theater

### **6:05 P.M.**

2. **CLOSED SESSION** – Lincoln High School - Office Conference Room
  - 2.1 **CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION**  
Case No. SCV0032309, Western Placer Unified School District vs. City of Lincoln
  - 2.2 **CONFERENCE WITH LABOR NEGOTIATOR**  
Bargaining groups: WPTA & CSEA Negotiations  
Agency Negotiators: Scott Leaman, Superintendent, Mary Boyle, Deputy Superintendent of Educational Services, Ryan Davis, Director of Human Services  
Audrey Kilpatrick, Assistant Superintendent of Business and Operations
  - 2.3 **PERSONNEL**  
**PUBLIC EMPLOYEE DISCIPLINE/DISMISSAL/RELEASE**
  - 2.4 **INTERDISTRICT ATTENDANCE APPEAL**
    - a. Interdistrict Request Appeal 13/14 – 20
    - b. Interdistrict Request Appeal 13/14 – 21
    - c. Interdistrict Request Appeal 13/14 – 22

### **7:00 P.M.**

3. **ADJOURN TO OPEN SESSION/PLEDGE OF ALLEGIANCE**—Lincoln High School Performing Arts Building.  
The Board of Trustees will disclose any action taken in Closed Session regarding the following items:
  - 3.1 **CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION**  
Case No. SCV0032309, Western Placer Unified School District vs. City of Lincoln
  - 3.2 **CONFERENCE WITH LABOR NEGOTIATOR**  
Bargaining groups: WPTA & CSEA Negotiations



# Regular Meeting of the Board of Trustees

August 20, 2013

## Agenda

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Agency Negotiators: Scott Leaman, Superintendent, Mary Boyle, Deputy Superintendent of Educational Services, Ryan Davis, Director of Human Services  
Audrey Kilpatrick, Assistant Superintendent of Business and Operations

### 3.3 PERSONNEL

#### PUBLIC EMPLOYEE DISCIPLINE/DISMISSAL/RELEASE

### 3.4 INTERDISTRICT ATTENDANCE APPEAL

- a. Interdistrict Request Appeal 13/14 – 20
- b. Interdistrict Request Appeal 13/14 – 21
- c. Interdistrict Request Appeal 13/14 – 22

## 4. CONSENT AGENDA

### **NOTICE TO THE PUBLIC**

All items on the Consent Agenda will be approved with one motion, which is not debatable and requires a unanimous vote for passage. If any member of the Board, Superintendent, or the public, so request, items may be removed from this section and placed in the regular order of business following the approval of the consent agenda.

- 4.1 Classified Personnel Report
- 4.2 Certificated Personnel Report
- 4.3 Report of Disclosure Requirements for Quarterly Reports of Investments.
- 4.4 2013-14 Agricultural Career Technical Education Incentive Grant.
- 4.5 Agreement to furnish food Service between KidZKount: Placer Community Action Council, Inc. and WPUUSD.

*Roll call vote:*

## 5. COMMUNICATION FROM THE PUBLIC

This portion of the meeting is set aside for the purpose of allowing an opportunity for individuals to address the Board regarding matters not on the agenda, but within the board's subject matter jurisdiction. The Board is not allowed to take action on any item, which is not on the agenda except as authorized by Government Code Section 54954.2. Request forms for this purpose "Request to Address Board of Trustees" are located at the entrance to the Performing Arts Theater. Request forms are to be submitted to the Board Clerk prior to the start of the meeting.

## 6. REPORTS & COMMUNICATION

- 6.1 Lincoln High School, Student Advisory – Jillian Loya
- 6.2 Western Placer Teacher's Association – Tara McCroskey
- 6.3 Western Placer Classified Employee Association – Mike Kimbrough
- 6.4 Deputy Superintendent – Mary Boyle

## 7. ♦ACTION ♦DISCUSSION ♦INFORMATION

Members of the public wishing to comment on any items should complete a yellow **REQUEST TO ADDRESS BOARD OF TRUSTEES** form located on the table at the entrance to the Performing Arts Theater. Request forms are to be submitted to the Board Clerk before each item is discussed.

# Regular Meeting of the Board of Trustees

August 20, 2013

## Agenda

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- 7.1 Discussion/ Action** **APPROVE RESOLUTION NO. 13/14.3 REGARDING AUTHORIZATION TO TEACH ASSIGNED SUBJECTS** – Boyle (13-14 G & O Component I, II, III, IV, V)

●Pursuant to Education Code 44256(b), and in order to ensure proper credentialing and teacher consistency for one of our assignments the District administration is making a recommendation that the Board approve Resolution No. 13/14.3 which will allow one certificated teacher to teach Social Science for the entire 2013-2014 school year in a middle school departmentalized setting at grades 6-8 at Glen Edwards Middle School. The teacher has consented to this assignment.

*Roll call vote:*

- 7.2 Information** **COMMON CORE STATE STANDARDS – OVERVIEW, HISTORY, MYTHS & PROGRESS CHECK** – Boyle (13-14 G & O Component I, II, III, IV, V)

●Common Core State Standards reflect an enormous shift in instructional strategies and learning expectations on the parts of school districts and students. The Common Core were adopted by the State of California on August 2, 2010, and have now been adopted by nearly all of the 50 United States.

- 7.3 Action** **COMMON CORE STATE STANDARDS ONE-TIME FUNDING PRELIMINARY ACTION PLAN** – Boyle (13-14 G & O Component I, II, III, IV, V)

●AB 86 Education Omnibus Trailer Bill appropriates \$1.25 billion statewide to support the integration of academic content standards instruction, apportioning these funds to school districts, county offices of education, charter schools and state special schools on an equal rate per pupil basis, based on prior year enrollment. The bill requires the receiving entities to adopt a plan delineating how the funds shall be spent and to report detailed expenditure information to the State Department of Education on or before July 1, 2015.

## 8. BOARD OF TRUSTEES

### 8.1 FUTURE AGENDA ITEMS

The following are a number of agenda items that the Board of Trustees has been monitoring. They are NOT action items for tonight's meeting, but are noted here for continuing purposes and to ensure that when there are changes or new information they will be called up as Action/Discussion/Information.

- Relationship with Sierra Community College
- Twelve Bridges High School
- Lincoln Crossing Elementary South/Facilities Update

### 8.2 BOARD MEMBER REPORTS/COMMENTS

## 9. ESTABLISHMENT OF NEXT MEETING(S)

The President will establish the following meeting(s):

➤**September 3, 2013 7:00 P.M.**, Regular Meeting of the Board of Trustee – Lincoln High School



# Regular Meeting of the Board of Trustees

August 20, 2013

## Agenda

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➤ **September 17, 2013 7:00 P.M.**, Regular Meeting of the Board of Trustee – Lincoln High School

### **10. ADJOURNMENT**

<p><b>BOARD BYLAW 9320:</b> Individuals requiring disability-related accommodations or modifications including auxiliary aids and services in order to participate in the Board meeting should contact the Superintendent or designee in writing at least two days prior to meeting date. (American Disabilities Act) Government Code 54954.1</p>
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**Posted: 081613**

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**DISCLOSURE  
OF ACTION  
TAKEN IN  
CLOSED SESSION,  
IF ANY**



# Western Placer Unified School District

## CLOSED SESSION AGENDA

Place: Lincoln High School – Main Office Conference Room

Date: Tuesday, August 20, 2013

Time: 6:05 P.M.

1. LICENSE/PERMIT DETERMINATION
  2. SECURITY MATTERS
  3. CONFERENCE WITH REAL PROPERTY NEGOTIATOR
  4. CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION
  5. CONFERENCE WITH LEGAL COUNSEL - ANTICIPATED LITIGATION
  6. LIABILITY CLAIMS
  7. THREAT TO PUBLIC SERVICES OR FACILITIES
  8. **PERSONNEL**
    - \* PUBLIC EMPLOYEE APPOINTMENT
    - \* PUBLIC EMPLOYEE EMPLOYMENT
    - \* PUBLIC EMPLOYEE PERFORMANCE EVALUATION
    - \* PUBLIC EMPLOYEE DISCIPLINE/DISMISSAL/RELEASE
    - \* COMPLAINTS OR CHARGES AGAINST AN EMPLOYEE
  9. CONFERENCE WITH LABOR NEGOTIATOR
  10. **STUDENTS**
    - \* STUDENT DISCIPLINE/EXPULSION PURSUANT TO E.C. 48918
    - \* STUDENT PRIVATE PLACEMENT
    - \* **INTERDISTRICT ATTENDANCE APPEAL**
    - \* STUDENT ASSESSMENT INSTRUMENTS
    - \* STUDENT RETENTION APPEAL, Pursuant to BP 5123
    - \* DISCLOSURE OF CONFIDENTIAL STUDENT RECORD INFORMATION
- 
1. LICENSE/PERMIT DETERMINATION
    - a. Specify the number of license or permit applications.
  2. SECURITY MATTERS
    - a. Specify law enforcement agency
    - b. Title of Officer,
  3. CONFERENCE WITH REAL PROPERTY NEGOTIATOR
    - a. Property: specify the street address, or if no street address the parcel number or unique other reference to the property under negotiation.

- b. Negotiating parties: specify the name of the negotiating party, not the agent who directly or through an agent will negotiate with the agency's agent.
  - c. Under negotiations: specify whether the instructions to the negotiator will concern price, terms of payment or both.
- 4. **CONFERENCE WITH LEGAL COUNSEL-EXISTING LITIGATION**
  - a. Name of case: specify by reference to claimant's name, names or parties, case or claim number.
  - b. Case name unspecified: specify whether disclosure would jeopardize service of process or existing settlement negotiations.
- 5. **CONFERENCE WITH LEGAL COUNSEL-ANTICIPATED LITIGATION**
  - a. Significant exposure to litigation pursuant to subdivision (b) of Government Code section 54956.9 (if the agency expects to be sued) and also specify the number of potential cases.
  - b. Initiation of litigation pursuant to subdivision (c) of Government Code Section 54956.9 (if the agency intends to initiate a suit) and specify the number of potential cases.
- 6. **LIABILITY CLAIMS**
  - a. Claimant: specify each claimants name and claim number (if any). If the claimant is filing a claim alleging district liability based on tortuous sexual conduct or child abuse, the claimant's name need not be given unless the identity has already been publicly disclosed.
  - b. Agency claims against.
- 7. **THREATS TO PUBLIC SERVICES OR FACILITIES**
  - a. Consultation with: specify name of law enforcement agency and title of officer.
- 8. **PERSONNEL:**
  - A. **PUBLIC EMPLOYEE APPOINTMENT**
    - a. Identify title or position to be filled.
  - B. **PUBLIC EMPLOYEE EMPLOYMENT**
    - a. Identify title or position to be filled.
  - C. **PUBLIC EMPLOYEE PERFORMANCE EVALUATION**
    - a. Identify position of any employee under review.
  - D. **PUBLIC EMPLOYEE DISCIPLINE/DISMISSAL/RELEASE**
    - a. It is not necessary to give any additional information on the agenda.
  - E. **COMPLAINTS OR CHARGES AGAINST AN EMPLOYEE, UNLESS EMPLOYEE REQUESTS OPEN SESSION**
    - a. No information needed
- 9. **CONFERENCE WITH LABOR NEGOTIATOR**
  - a. Name any employee organization with whom negotiations to be discussed are being conducted.
  - b. Identify the titles of unrepresented individuals with whom negotiations are being conducted.
  - c. Identify by name the agency's negotiator
- 10. **STUDENTS:**
  - A. **STUDENT DISCIPLINE/EXPULSION PURSUANT TO E.C. 48918**
  - B. **STUDENT PRIVATE PLACEMENT**
    - a. Pursuant to Board Policy 6159.2
  - C. **INTERDISTRICT ATTENDANCE APPEAL**
    - a. Education Code 35146 and 48918
  - D. **STUDENT ASSESSMENT INSTRUMENTS**
    - a. Reviewing instrument approved or adopted for statewide testing program.
  - E. **STUDENT RETENTION/ APPEAL**
    - a. Pursuant to Board Policy 5123
  - F. **DISCLOSURE OF CONFIDENTIAL STUDENT RECORD INFORMATION**
    - a. Prevent the disclosure of confidential student information.



**WESTERN PLACER UNIFIED SCHOOL DISTRICT  
BOARD OF TRUSTEE MEETING FACT SHEET**

**MISSION STATEMENT:** Empower Students with the skills, knowledge, and attitudes for Success in an Ever Changing World.

**DISTRICT GLOBAL GOALS**

1. **Develop and continually upgrade a well articulated K-12 academic program that challenges all students to achieve their highest potential, with a special emphasis on students**
2. **Foster a safe, caring environment where individual differences are valued and respected.**
3. **Provide facilities for all district programs and functions that are suitable in terms of function, space, cleanliness and attractiveness.**
4. **Promote the involvement of the community, parents, local government, business, service organizations, etc. as partners in the education of the students.**
5. **Promote student health and nutrition in order to enhance readiness for learning.**

**SUBJECT:**

CONFERENCE WITH LEGAL COUNSEL –  
EXISTING LITIGATION

**AGENDA ITEM AREA:**

Disclosure of Action Taken in  
Closed Session

**REQUESTED BY:**

Audrey Kilpatrick,  
Assistant Superintendent

**ENCLOSURES:**

No

**DEPARTMENT:**

Administration

**FINANCIAL INPUT/SOURCE:**

N/A

**MEETING DATE:**

August 20, 2013

**ROLL CALL REQUIRED:**

No

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**BACKGROUND:**

The Board of Trustees will disclose any action taken in closed session in regard to the Existing Litigation of Case No. SCV0032309, Western Placer Unified School District vs. City of Lincoln.

**RECOMMENDATION:**

Administration recommends the Board of Trustees disclose action taken in closed session in regard to Existing Litigation.

**WESTERN PLACER UNIFIED SCHOOL DISTRICT  
BOARD OF TRUSTEE MEETING FACT SHEET**

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**SUBJECT:**

Bargaining Groups:

WPTA & CSEA Negotiations

Agency Negotiators:

Scott Leaman, Superintendent

Mary Boyle, Deputy Superintendent

Ryan Davis, Director of Human Services

Audrey Kilpatrick, Assistant Superintendent

Business and Operations

**AGENDA ITEM AREA:**

Disclosure of action taken in  
closed session

**REQUESTED BY:**

Ryan Davis

Director of Human Services

**ENCLOSURES:**

No

**DEPARTMENT:**

Personnel

**FINANCIAL INPUT/SOURCE:**

N/A

**MEETING DATE:**

August 20, 2013

**ROLL CALL REQUIRED:**

No

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**BACKGROUND:**

Labor Negotiator will give the Board of Trustees an update on Western Placer Teachers Association & Classified Schools Employee Association Bargaining Groups.

**ADMINISTRATION RECOMMENDATION:**

Administration recommends the board of trustees be updated on negotiations.



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BOARD OF TRUSTEE MEETING FACT SHEET**

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**SUBJECT:**

PUBLIC EMPLOYEE DISCIPLINE/DISMISSAL/  
RELEASE

**AGENDA ITEM AREA:**

Closed Session

**REQUESTED BY:**

Ryan Davis  
Director, Human Services

**ENCLOSURES:**

No

**DEPARTMENT:**

Personnel

**FINANCIAL INPUT/SOURCE:**

N/A

**MEETING DATE:**

August 20, 2013

**ROLL CALL REQUIRED:**

No

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**BACKGROUND:**

The Board of Trustees will disclose any action taken in closed session in regard to Public Employee Discipline/Dismissal/Release.

**RECOMMENDATION:**

Administration recommends the Board of Trustees disclose action taken in closed session in regard to Public Employee Discipline/Dismissal/Release.

**WESTERN PLACER UNIFIED SCHOOL DISTRICT  
BOARD OF TRUSTEE MEETING FACT SHEET**

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5. **Promote student health and nutrition in order to enhance readiness for learning.**

**SUBJECT:**

Interdistrict Appeal

**AGENDA ITEM AREA:**

Disclosure of Action Taken in  
Closed Session

**REQUESTED BY:**

Mary Boyle,  
Deputy Superintendent

**ENCLOSURES:**

No

**DEPARTMENT:**

Administration

**FINANCIAL INPUT/SOURCE:**

N/A

**MEETING DATE:**

August 20, 2013

**ROLL CALL REQUIRED:**

No

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**BACKGROUND:**

The Board of Trustees will discuss disclose any action taken in closed session regarding the following transfer appeals:

- Interdistrict Request Appeal 13/14 – 20
- Interdistrict Request Appeal 13/14 – 21
- Interdistrict Request Appeal 13/14 – 22

**ADMINISTRATION RECOMMENDATION:**

Disclose any action taken.



**CONSENT**

**AGENDA**

**ITEMS**

**WESTERN PLACER UNIFIED SCHOOL DISTRICT  
BOARD OF TRUSTEE MEETING FACT SHEET**

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**SUBJECT:**

Classified Personnel Report

**AGENDA ITEM AREA:**

Consent Agenda

**REQUESTED BY:**

Ryan Davis   
Director, Human Services

**ENCLOSURES:**

**DEPARTMENT:**

Personnel

**FINANCIAL INPUT/SOURCE:**

General Fund/Categorical

**MEETING DATE:**

August 20, 2013

**ROLL CALL REQUIRED:**

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**BACKGROUND:**

The Board of Trustees will take action to approve the classified personnel report.

**RECOMMENDATION:**

Administration recommends ratification of the classified personnel report.

**WESTERN PLACER UNIFIED SCHOOL DISTRICT  
PERSONNEL REPORT**

**August 20, 2013**

**CLASSIFIED/MANAGEMENT**

**NEW HIRES**

- 1. Name: Kathleen Johnson**  
**Position: Preschool Inst. Aide**  
**Salary: CSEA, Range 15, Step D**  
**Hours: 3 Hours/Day**  
**Days: 10 Months/Year**  
**Effective: 8/21/13**  
**Site: Sheridan Elementary**
  
- 2. Name: Amanda Urrutia-Sanders**  
**Position: Business Administrative Asst.**  
**Salary: CCP, Step 3**  
**Hours: 8 Hours/Day**  
**Days: 12 Months/Year**  
**Effective: 8/8/13**  
**Site: District Office**  
**Replacement**

**RESIGNATIONS**

- 1. Name: Ruston Miller**  
**Position: Bus Driver**  
**Site: Transportation**  
**Hours: 4 Hours/Day**  
**Effective: 8/1/13**

4.1.1



WESTERN PLACER UNIFIED SCHOOL DISTRICT  
PERSONNEL DEPARTMENT  
600 SIXTH STREET, 4<sup>th</sup> FLOOR  
LINCOLN, CA 95648  
(916) 645-5293

**NOTIFICATION** OF CLASSIFIED/CLASSIFIED MANAGEMENT EMPLOYMENT

You are hereby notified that: Kathleen Johnson has  
(Applicant's name)

been offered employment. The offer of employment is based on the following criteria:

Position Title: Preschool Instructional Aide

Effective Date of Assignment: 8/21/13  
(To Be Determined By Personnel Department)

Assignment Location: Sheridan Elementary

Range: 15 Step: D Amount \$ 15.13 (As Per WPCSEA Contract)

Number of Hours Assigned Per Day: 3

☒ Newly Approved Position

☐ Replacement:

If Replacement, Name of Prior Employee: \_\_\_\_\_

The Personnel Department will contact applicant regarding new employee orientation, health and welfare benefits, **T.B. clearance**, fingerprints, and pre-employment physical if applicable.

**\*\* If this position is for an instructional aide, applicant must pass NCLB test.**

Kathleen Johnson 8/7/13  
Applicant's signature Date

[Signature] 8/8/13  
Administrator's signature Date

WESTERN PLACER UNIFIED SCHOOL DISTRICT  
PERSONNEL DEPARTMENT  
600 SIXTH STREET, 4<sup>th</sup> FLOOR  
LINCOLN, CA 95648  
(916) 645-5293

**NOTIFICATION** OF CLASSIFIED/CLASSIFIED MANAGEMENT EMPLOYMENT

You are hereby notified that: Amanda Urrutia-Sanders has  
(Applicant's name)

been offered employment. The offer of employment is based on the following criteria:

Position Title: Business Administrative Assistant

Effective Date of Assignment: 8/8/13  
(To Be Determined By Personnel Department)

Assignment Location: District Office

Range: CCP Step: 3 Amount \$ 22.84 (As Per WPCSEA Contract)

Number of Hours Assigned Per Day: 8

☐ Newly Approved Position


☒ Replacement:

If Replacement, Name of Prior Employee: Virginia Garcia

The Personnel Department will contact applicant regarding new employee orientation, health and welfare benefits, **T.B. clearance**, fingerprints, and pre-employment physical if applicable.

**\*\* If this position is for an instructional aide, applicant must pass NCLB test.**

 8/15/13  
Applicant's signature Date

 7/30/13  
Administrator's signature Date

Dear Mark

I, Ruston T. Miller, resign from the permanent School Bus Driver on Thursday August 1, 2013. I still would like to be a Substitute School Bus Driver. Thank you for your time and making this change happen for me.

Ruston T. Miller



8/8/13  
AL  
4.1.4



**WESTERN PLACER UNIFIED SCHOOL DISTRICT  
BOARD OF TRUSTEE MEETING FACT SHEET**

**MISSION STATEMENT:** Empower Students with the skills, knowledge, and attitudes for Success in an Ever Changing World.

**DISTRICT GLOBAL GOALS**

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**SUBJECT:**

Certificated Personnel Report

**AGENDA ITEM AREA:**

Consent Agenda

**REQUESTED BY:**

  
Ryan Davis  
Director of Human Services

**ENCLOSURES:**

Yes

**DEPARTMENT:**

Personnel

**FINANCIAL INPUT/SOURCE:**

Categorical/General

**MEETING DATE:**

August 20, 2013

**ROLL CALL REQUIRED:**

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**BACKGROUND:**

The Board of Trustees will take action to approve the certificated personnel report.

**RECOMMENDATION:**

Administration recommends ratification of the certificated personnel report.

**WESTERN PLACER UNIFIED SCHOOL DISTRICT**

**PERSONNEL REPORT**

**August 20, 2013**

**CERTIFICATED/MANAGEMENT**

**NEW HIRE:**

1.     **Name:**                 Sheila Bane  
       **Position:**         Temporary Elementary Science Teacher  
       **FTE:**                 .60  
       **Effective Date:**     August 15, 2013  
       **Site:**                Foskett Ranch Elementary
  
2.     **Name:**                 Danielle O'Malley  
       **Position:**         English Teacher  
       **FTE:**                 1.0  
       **Effective Date:**     August 15, 2013  
       **Site:**                Twelve Bridges Middle

**RESIGNATIONS:**

1.     **Name:**                 Allyson Popp  
       **Position:**         3rd Grade Teacher  
       **FTE:**                 1.0  
       **Effective Date:**     August 5, 2013  
       **Site:**                Lincoln Crossing Elementary

42.1

**WESTERN PLACER UNIFIED SCHOOL DISTRICT  
BOARD OF TRUSTEE MEETING FACT SHEET**

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5. Promote student health and nutrition in order to enhance readiness for learning.

**SUBJECT:**

Report of Disclosure Requirements for Quarterly Reports of Investments.

**AGENDA ITEM AREA:**

Consent

**REQUESTED BY:**

Audrey Kilpatrick   
Assistant Superintendent of Business Services and Operations

**ENCLOSURES:**

Yes

**DEPARTMENT:**

Business Services

**FINANCIAL INPUT/SOURCE:**

N/A

**MEETING DATE:**

August 20, 2013

**ROLL CALL REQUIRED:**

No

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**BACKGROUND:**

Government Code 53646 requires that if a local agency has placed all of its investments in the Local Agency Investment Fund or in a Federal Deposit Insurance Corporation insured accounts in a bank or savings and loan association, in a county investment pool or any combination of these, the chief financial officer needs to provide to the Board of Trustees the most recent statement of statements received by the local agency from these institutions.

The District maintains its entire reserve in the County of Placer investment pool. Therefore, to meet the requirements of Government Code 53646, the County of Placer Treasurer's Investment Reports are submitted to the District's Board of Trustees on a quarterly basis for their review.

**RECOMMENDATION:**

Accept the report of disclosure requirements for quarterly reports of investments.

43



# WESTERN PLACER UNIFIED SCHOOL DISTRICT

PERSONNEL DEPARTMENT  
600 SIXTH STREET, SUITE 400  
LINCOLN, CA 95648  
(916) 645-5293

# 1030  
TD Bd 8/20/13  
livescan OK  
4486

## **NOTIFICATION OF TEMPORARY CERTIFICATED/CERTIFICATED MANAGEMENT EMPLOYMENT**

Consideration is being given to \*\*

NAME: Shila Bane

for employment for the \*\* 2013-2014 school year. Tentative assignment will be

\*\* Temporary Elem. Science Teacher School FRE

Newly Approved Position X OR Replacement \_\_\_\_\_  
To Fill, to Science

If Replacement, Name of Prior Employee \_\_\_\_\_

Please complete the following:

- \*\* ● Hire date 8/15/13 (First contract workday)
- Full Day \_\_\_\_\_ (Length of service \_\_\_\_\_)
- Part Day 100% (Length of service \_\_\_\_\_)
- Substitute \_\_\_\_\_
- Temporary X
- Probationary \_\_\_\_\_

Salary classification D-08 \$ 56,842 @ 100% = \$34,105.20 /yr,  
based on A.B. + 54.27 units and 7 years of teaching experience. (Salary schedule placement will be determined only by personnel department)

### **FIRST YEAR TEACHERS MUST WORK 50% OF THE YEAR TO RECEIVE NEXT STEP**

The TEMPORARY contract is being issued based on the following credential(s):

\*\* Science Single Subject Teaching Credential & CLAD.

\*\* This offer of employment is contingent upon the candidate's receipt of the appropriate Science Single Subject Teaching Credential & CLAD.

\*\*Salary Placement is contingent upon verification of previous employment and official transcripts.

**I have attached his/her credential (MA degree, if applicable), application, transcript, verification of service years, unused sick leave, and a current T.B. clearance for final processing.**

\*\* Shila M Bane 8/15/13 10:46am [Signature] 8/6/13  
(Applicant signature) (Date) (Time) (Administrator's signature) (Date)

NOTE: Contract pending Board of Trustee ratification.

**\* TO BE COMPLETED BY PERSONNEL DEPARTMENT \***

CERTNOT

42.2

# WESTERN PLACER UNIFIED SCHOOL DISTRICT

PERSONNEL DEPARTMENT  
600 SIXTH STREET, SUITE 400  
LINCOLN, CA 95648  
(916) 645-5293

Wilson OK  
TO Bd 8/20/13  
3857

## **NOTIFICATION** OF CERTIFICATED/CERTIFICATED MANAGEMENT EMPLOYMENT

Consideration is being given to \*\*

NAME: Danielle O'Malley

for employment for the \*\* 2013/2014 school year. Tentative assignment will be

\*\* English Teacher School TRMS

Newly Approved Position \_\_\_\_\_ OR Replacement X

If Replacement, Name of Prior Employee Cindy Cygan

Please complete the following:

- \*\* ● Hire date 8/15/13 (First contract workday)
- Full Day X (Length of service \_\_\_\_\_)
- Part Day \_\_\_\_\_ (Length of service \_\_\_\_\_)
- Substitute \_\_\_\_\_
- Temporary \_\_\_\_\_
- Probationary X

Salary classification D-01 \$43,929 + MA \$1216 yr = \$45,145 /yr,  
based on A.B. + 44 (MA+0) units and 0 years of teaching experience. (Salary schedule  
placement will be determined only by personnel department)

### **FIRST YEAR TEACHERS MUST WORK 50% OF THE YEAR TO RECEIVE NEXT STEP**

The contract is being issued based on the following credential(s):

\*\* Appropriate English Credential

\*\* This offer of employment is contingent upon the candidate's receipt of the appropriate English Credential.

\*\*Salary Placement is contingent upon verification of previous employment and official transcripts.

***I have attached his/her credential (MA degree, if applicable), application, transcript, verification of service years, unused sick leave, and a current T.B. clearance for final processing.***

Danielle O'Malley 8/1/13 10:00 am [Signature] 7/30/13  
(Applicant signature) (Date) (Time) (Administrator's signature) (Date)

NOTE: Contract pending Board of Trustee ratification.

**\* TO BE COMPLETED BY PERSONNEL DEPARTMENT \***

Allyson Popp  
1826 Meridian Way  
Rocklin, CA 95765

8/5/2013

Western Placer Unified School District  
Lincoln Crossing Elementary School  
600 Sixth Street  
Suite 400  
Lincoln, CA 95648

To Whom It May Concern:

Thank you for the wonderful opportunity to work for you at Lincoln Crossing and Carlin C. Coppin Elementary Schools. Over the last seven years, I enjoyed meeting and working with fantastic people including the faculty, and especially Western Placer's students.

I would like to extend my gratitude to everyone that made Western Placer Unified School District such a great place to work, grow, and learn. While I was excited at the opportunity to continue my career with Lincoln Crossing next year as a third grade teacher, unfortunately I am moving and I will not be able to be work for Western Placer Unified School District in the future.

Therefore, I am tendering the resignation of my position effective today, August 5, 2013.

Regards,



Allyson Popp

8/5/13  
4.2.4



Office of  
Jenine Windeshausen  
Treasurer-Tax Collector  
County of Placer

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## COUNTY OF PLACER

### TREASURER'S POOLED INVESTMENT REPORT

For the Month of APRIL 30, 2013

4.3.1

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2976 Richardson Drive • Auburn, California 95603  
Tax Collector / Business Licenses (530) 889-4120 • Treasurer (530) 889-4140 • Bonds (530) 889-4146

## **PREFACE**

### **Placer County Treasurer's Pooled Investment Report**

**April 30, 2013**

For the purpose of clarity the following glossary of investment terms has been provided.

**Book Value** is the purchase price of a security plus amortization of any premium or discount. This may be more or less than face value, depending upon whether the security was purchased at a premium or at a discount.

**Par Value** is the principal amount of a security and the amount of principal that will be paid at maturity.

**Market Value** is the value at which a security can be sold at the time it is priced or the need to sell arises.

Market values are only relevant if the investment is sold prior to maturity. Profit or loss would be realized only if the specific investment were to be sold.

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### **Government Code 53646 Compliance Report**

The following information is a monthly update of funds on deposit in the Placer County Treasury pursuant to California Government code Section 53646. Further details of individual investments are included in the Treasurer's Monthly Investment Report. All investment transactions and decisions have been made with full compliance with California Government Code and Placer County's Statement of Investment Policy.

Individual securities are priced at the end of each month by Wells Fargo Bank.

The Weighted Average Maturity of the investments with the Treasury is 1,528 days.

The ability of the Placer County Treasury to meet its cash flow needs is demonstrated by \$ 373,170,840.90 in cash and investments maturing in the next 180 days.



Placer County

**General Fund  
Portfolio Management  
Portfolio Summary  
April 30, 2013**

Investments	Par Value	Market Value	Book Value	% of Portfolio	Term	Days to Maturity	YTM 360 Equiv.	YTM 365 Equiv.
U.S. Treasury Coupons	40,000,000.00	41,094,300.00	40,256,008.67	3.64	1,517	578	1.547	1.569
Federal Agency Coupons	490,000,000.00	491,117,741.66	490,066,896.26	44.27	1,801	1,674	1.079	1.094
Medium Term Notes	223,985,000.00	226,794,751.91	224,211,251.47	20.25	1,259	808	1.313	1.331
Negotiable Certificates of Deposit	150,000,000.00	150,012,200.00	150,000,011.09	13.55	175	58	0.267	0.270
Commercial Paper Disc. -Amortizing	90,000,000.00	89,966,254.00	89,966,255.55	8.13	91	66	0.202	0.205
Municipal Bonds	3,007,134.76	3,007,134.76	3,007,134.76	0.27	435	425	0.395	0.400
PFA - HELICOPTER	674,413.00	674,413.00	674,413.00	0.06	2,559	1,076	2.442	2.476
Local Agency GO Bond	65,000.00	65,000.00	65,000.00	0.01	1,468	61	0.492	0.499
Local Agency Bonds	77,685,694.00	77,685,694.00	77,685,694.00	7.02	10,961	8,371	3.817	3.870
Rolling Repurchase Agreements - 2	30,074,788.10	30,074,788.10	30,074,788.10	2.72	1	1	0.120	0.122
mPower Placer	990,894.25	990,894.25	990,894.25	0.09	1	1	3.452	3.500
<b>Investments</b>	<b>1,106,482,924.11</b>	<b>1,111,483,171.68</b>	<b>1,106,998,347.15</b>	<b>100.00%</b>	<b>1,911</b>	<b>1,528</b>	<b>1.129</b>	<b>1.145</b>

<b>Cash</b>								
Passbook/Checking (not included in yield calculations)	37,031,052.80	37,031,052.80	37,031,052.80		1	1	0.000	0.000
<b>Total Cash and Investments</b>	<b>1,143,513,976.91</b>	<b>1,148,514,224.48</b>	<b>1,144,029,399.95</b>		<b>1,911</b>	<b>1,528</b>	<b>1.129</b>	<b>1.145</b>

Total Earnings	April 30	Month Ending	Fiscal Year To Date
Current Year	1,014,275.74		11,913,038.81
Average Daily Balance	1,136,457,780.30		984,541,047.04
Effective Rate of Return	1.09%		1.45%

*Kimberly Hawley*  
KIMBERLY HAWLEY, CHIEF DEPUTY TREASURER

Reporting period 04/01/2013-04/30/2013  
Data Updated: FUNDSNAP: 05/01/2013 15:07  
Run Date: 05/01/2013 - 15:07

Portfolio PLCR  
NLI AC  
PM (PRE\_PM1) 7.3.0  
Report Ver. 7.3.3

7.3.3



**General Fund**  
**Portfolio Management**  
**Investment Status Report - Investments**  
**April 30, 2013**

Page 1

CUSIP	Investment #	Issuer	Par Value	Stated Rate	Maturity Date	Purchase Date	YTM 360	YTM 365	Market Value	Accrued Interest At Purchase	Current Principal	Book Value
<b>U.S. Treasury Coupons</b>												
912828JD3	09394	UST	10,000,000.00	3.375	06/30/2013	03/30/2010	1.742	1.767	10,055,100.00	Received	10,506,250.00	10,025,568.18
912828PJ3	10046	UST	10,000,000.00	1.375	11/30/2015	12/02/2010	1.569	1.591	10,281,300.00	Received	9,896,875.00	9,946,684.83
912828PJ3	10047	UST	10,000,000.00	1.375	11/30/2015	12/02/2010	1.627	1.650	10,281,300.00	Received	9,868,750.00	9,932,144.33
912828CJ7	10063	UST	10,000,000.00	4.750	05/15/2014	12/14/2010	1.261	1.279	10,476,600.00	Received	11,157,812.50	10,351,611.33
<b>U.S. Treasury Coupons Totals</b>			<b>40,000,000.00</b>				<b>1.547</b>	<b>1.569</b>	<b>41,094,300.00</b>	<b>0.00</b>	<b>41,429,687.50</b>	<b>40,256,008.67</b>
<b>Federal Agency Coupons</b>												
3133ECB45	12038	FFCB	10,000,000.00	0.900	12/26/2017	12/26/2012	0.908	0.921	10,027,300.00		9,990,000.00	9,990,684.44
3133ECDE1	12043	FFCB	10,000,000.00	0.940	01/22/2018	01/24/2013	0.947	0.961	10,036,822.22	522.22	9,990,000.00	9,991,061.71
3133ECEQ3	12048	FFCB	10,000,000.00	1.100	02/06/2018	02/06/2013	1.085	1.100	10,049,700.00		10,000,000.00	10,000,000.00
3133ECFA7	12049	FFCB	10,000,000.00	1.080	02/13/2018	02/13/2013	1.065	1.080	10,046,800.00		10,000,000.00	10,000,000.00
3133ECJX3	12059	FFCB	10,000,000.00	1.040	03/26/2018	03/26/2013	1.041	1.055	10,031,100.00		9,992,645.83	9,992,645.83
3133ECL44	12072	FFCB	10,000,000.00	1.000	04/11/2018	04/11/2013	0.991	1.005	10,016,100.00		9,997,527.78	9,997,527.78
313380TD9	12013	FHLB	10,000,000.00	1.000	10/16/2017	10/16/2012	0.986	1.000	10,001,100.00		10,000,000.00	10,000,000.00
3133814L6	12019	FHLB	10,000,000.00	1.050	11/15/2017	11/15/2012	1.036	1.050	10,003,800.00		10,000,000.00	10,000,000.00
3133813R4	12036	FHLB	10,000,000.00	1.000	11/09/2017	12/19/2012	0.986	1.000	10,013,211.11	11,111.11	10,000,000.00	10,011,111.11
313382Z25	12050	FHLB	10,000,000.00	0.750	02/15/2018	02/15/2013	1.081	1.096	10,002,800.00		9,985,000.00	9,985,633.33
313382Z25	12051	FHLB	10,000,000.00	0.750	02/15/2018	02/15/2013	1.050	1.065	10,002,800.00		10,000,000.00	10,000,000.00
3133826K4	12054	FHLB	10,000,000.00	0.750	02/27/2018	02/27/2013	1.275	1.292	10,010,600.00		10,000,000.00	10,000,000.00
313382QF3	12069	FHLB	10,000,000.00	1.010	04/09/2018	04/09/2013	1.001	1.015	10,023,100.00		9,997,500.00	9,997,530.56
313382RQ8	12079	FHLB	10,000,000.00	0.750	04/30/2018	04/30/2013	1.224	1.241	10,013,100.00		10,000,000.00	10,000,000.00
3134G2U42	11068	FHLMC	10,000,000.00	0.375	10/15/2013	12/16/2011	0.407	0.413	10,011,600.00	Received	9,993,100.00	9,998,282.85
3136FTK57	11095	FNMA	10,000,000.00	0.875	02/13/2017	02/13/2012	1.345	1.363	10,062,300.00		10,000,000.00	10,000,000.00
3136G0KV2	11122	FNMA	10,000,000.00	1.000	06/07/2017	06/07/2012	1.276	1.294	10,008,700.00		10,000,000.00	10,000,000.00
3136G0NC1	11124	FNMA	10,000,000.00	0.750	06/28/2017	06/28/2012	1.336	1.355	9,996,500.00		9,992,500.00	9,993,762.50
3136G0ZV6	12003	FNMA	10,000,000.00	0.700	08/28/2017	08/28/2012	1.158	1.174	10,021,200.00		10,000,000.00	10,000,000.00
3136G0XQ9	12005	FNMA	10,000,000.00	0.625	08/22/2017	09/14/2012	1.133	1.149	10,002,100.00	Received	10,000,000.00	10,000,000.00
3136G0B59	12007	FNMA	10,000,000.00	0.700	09/20/2017	09/20/2012	1.080	1.095	10,021,800.00		10,000,000.00	10,000,000.00
3136G0K34	12008	FNMA	10,000,000.00	0.625	09/25/2017	09/25/2012	1.173	1.190	10,002,200.00		10,000,000.00	10,000,000.00
3136G0H46	12009	FNMA	10,000,000.00	0.600	09/26/2017	09/26/2012	1.046	1.060	10,054,600.00		10,000,000.00	10,000,000.00
3136G0N72	12015	FNMA	10,000,000.00	0.700	10/25/2017	10/25/2012	1.029	1.044	10,030,600.00		10,000,000.00	10,000,000.00
3136G0Y88	12017	FNMA	10,000,000.00	0.500	11/08/2017	11/08/2012	0.990	1.003	10,019,100.00		9,995,000.00	9,997,402.78
3135G0QW6	12018	FNMA	10,000,000.00	1.000	11/08/2017	11/08/2012	0.986	1.000	10,019,200.00		10,000,000.00	10,000,000.00
3136G04F5	12024	FNMA	10,000,000.00	0.750	11/21/2017	11/21/2012	1.104	1.120	10,030,700.00		10,000,000.00	10,000,000.00
3136G12J7	12027	FNMA	10,000,000.00	0.600	12/05/2017	12/05/2012	1.117	1.133	10,020,200.00		10,000,000.00	10,000,000.00

Portfolio PLCR  
 NLI AC  
 PM (PRF\_PMS) 7.3.0  
 Report Ver. 7.3.3

Data Updated: FUNDSNAP: 05/01/2013 15:07  
 Run Date: 05/01/2013 - 15:07

4.3.4

**General Fund**  
**Portfolio Management**  
**Investment Status Report - Investments**  
**April 30, 2013**

CUSIP	Investment #	Issuer	Par Value	Stated Rate	Maturity Date	Purchase Date	YTM 360	YTM 365	Market Value	Accrued Interest At Purchase	Current Principal	Book Value
<b>Federal Agency Coupons</b>												
3136G07K1	12028	FNMA	10,000,000.00	0.700	12/06/2017	12/06/2012	0.998	1.012	10,019,000.00		9,995,000.00	9,995,402.78
3136G07K1	12029	FNMA	10,000,000.00	0.700	12/06/2017	12/06/2012	0.988	1.002	10,019,000.00		10,000,000.00	10,000,000.00
3136G12A6	12033	FNMA	10,000,000.00	0.700	12/13/2017	12/13/2012	1.069	1.084	10,019,300.00		10,000,000.00	10,000,000.00
3136G15C9	12035	FNMA	10,000,000.00	0.700	12/19/2017	12/19/2012	1.094	1.109	10,007,500.00		10,000,000.00	10,000,000.00
3136G15K1	12039	FNMA	10,000,000.00	0.500	12/27/2017	12/27/2012	1.116	1.131	10,013,700.00		10,000,000.00	10,000,000.00
3136G16W4	12040	FNMA	10,000,000.00	0.650	12/27/2017	12/27/2012	0.645	0.654	10,022,600.00		9,998,000.00	9,998,137.78
3136G18A6	12045	FNMA	10,000,000.00	0.700	01/30/2018	01/30/2013	1.134	1.150	10,014,700.00		9,998,000.00	9,998,101.11
3136G18D0	12046	FNMA	10,000,000.00	0.750	01/30/2018	01/30/2013	1.031	1.045	10,010,800.00		10,000,000.00	10,000,000.00
3136G18F7	12047	FNMA	10,000,000.00	0.750	01/30/2018	01/30/2013	1.031	1.045	10,034,800.00		10,000,000.00	10,000,000.00
3136G18U1	12053	FNMA	10,000,000.00	0.750	02/21/2018	02/22/2013	1.135	1.151	10,027,908.33	208.33	9,985,000.00	9,985,783.65
3136G18B2	12055	FNMA	10,000,000.00	1.000	02/28/2018	02/28/2013	1.170	1.186	10,024,500.00		10,000,000.00	10,000,000.00
3135G0UX9	12056	FNMA	10,000,000.00	1.200	02/28/2018	02/28/2013	1.184	1.200	10,027,200.00		10,000,000.00	10,000,000.00
3136G1F95	12057	FNMA	10,000,000.00	0.750	02/28/2018	02/28/2013	1.259	1.276	10,018,100.00		9,995,000.00	9,995,175.00
3135G0VG5	12058	FNMA	10,000,000.00	1.500	03/13/2018	03/13/2013	1.184	1.200	10,180,700.00		10,145,000.00	10,141,133.33
3136G1GS2	12060	FNMA	10,000,000.00	0.500	03/27/2018	03/27/2013	1.226	1.243	10,005,400.00		10,000,000.00	10,000,000.00
3136G1HB8	12061	FNMA	10,000,000.00	0.800	03/28/2018	03/28/2013	1.100	1.115	10,036,100.00		10,000,000.00	10,000,000.00
3136G1J77	12073	FNMA	10,000,000.00	0.750	04/11/2018	04/11/2013	1.178	1.195	10,012,400.00		10,000,000.00	10,000,000.00
3136G1JY6	12077	FNMA	10,000,000.00	0.800	04/24/2018	04/24/2013	1.134	1.150	10,017,200.00		9,997,500.00	9,997,509.72
3136G1JY6	12078	FNMA	10,000,000.00	0.800	04/24/2018	04/24/2013	1.129	1.145	10,017,200.00		10,000,000.00	10,000,000.00
3136G1K99	12080	FNMA	10,000,000.00	0.750	04/30/2018	04/30/2013	1.104	1.120	9,997,100.00		10,000,000.00	10,000,000.00
3136G1K81	12081	FNMA	10,000,000.00	0.750	04/30/2018	04/30/2013	1.104	1.120	10,013,400.00		10,000,000.00	10,000,000.00
<b>Federal Agency Coupons Totals</b>									<b>491,117,741.66</b>	<b>11,841.66</b>	<b>490,046,600.00</b>	<b>490,066,896.26</b>

**Medium Term Notes**

2254C0TC1	09347	CS	5,000,000.00	5.000	05/15/2013	01/29/2010	2.512	2.547	5,007,800.00	Received	5,385,000.00	5,004,544.69
36962G4Q4	10026	GE	5,000,000.00	1.875	09/16/2013	10/15/2010	1.502	1.523	5,028,900.00	Received	5,050,000.00	5,008,422.45
36962GN1	10002	GE CAP	10,000,000.00	1.042	08/11/2015	08/11/2010	1.360	1.379	10,063,300.00		9,995,000.00	9,997,722.22
36962G4N1	10003	GE CAP	10,000,000.00	1.042	08/11/2015	08/18/2010	1.387	1.406	10,078,900.00	Received	9,980,000.00	9,990,853.32
36962G4S0	10056	GE CAP	10,000,000.00	0.934	09/30/2015	12/08/2010	1.258	1.275	10,019,100.00	Received	9,965,000.00	9,982,439.38
36962G4L5	11053	GE CAP	10,000,000.00	3.500	06/29/2015	11/21/2011	2.103	2.132	10,568,900.00	Received	10,472,200.00	10,283,028.97
36962G5Q3	11090	GE CAP	10,000,000.00	1.026	01/30/2015	01/31/2012	1.149	1.165	9,999,400.00		10,000,000.00	10,000,000.00
36962G5U4	12014	GE CAP	7,985,000.00	1.200	04/13/2015	10/22/2012	1.091	1.106	7,942,120.55	Received	8,003,365.50	7,999,469.79
36962G6Q2	12071	GE CAP	10,000,000.00	0.880	01/08/2016	04/11/2013	0.678	0.688	10,065,133.67	733.67	10,052,300.00	10,051,973.89
46623EJC4	10034	JPM	10,000,000.00	1.034	09/30/2013	11/08/2010	0.957	0.970	10,029,100.00	Received	10,043,900.00	10,006,312.96
46625HHW3	11094	JPM	10,000,000.00	2.600	01/15/2016	02/13/2012	2.101	2.130	10,422,900.00	Received	10,175,800.00	10,121,267.14

Portfolio PLCR  
NLI AC  
PM (PRF\_PMS) 7.3.0

Data Updated: FUNDSNAP: 05/01/2013 15:07

Run Date: 05/01/2013 - 15:07

4.3.5



**General Fund**  
**Portfolio Management**  
**Investment Status Report - Investments**  
**April 30, 2013**

Page 3

CUSIP	Investment #	Issuer	Par Value	Stated Rate	Maturity Date	Purchase Date	YTM 360	YTM 365	Market Value	Accrued Interest At Purchase	Current Principal	Book Value
<b>Medium Term Notes</b>												
46625HUA9	11099	JPM	10,000,000.00	3.150	07/05/2016	03/09/2012	2.348	2.380	10,631,500.00	Received	10,314,200.00	10,231,005.66
48126EAA5	12010	JPM	10,000,000.00	2.000	08/15/2017	09/26/2012	1.706	1.730	10,262,000.00	Received	10,125,900.00	10,110,511.43
46625HHB9	12022	JPM	16,000,000.00	4.750	05/01/2013	11/19/2012	0.283	0.287	16,038,000.00	38,000.00	16,320,880.00	16,038,000.00
594918AG9	10069	MSFT	10,000,000.00	1.625	09/25/2015	12/17/2010	2.150	2.180	10,288,900.00	Received	9,749,600.00	9,874,071.25
89233PA89	11121	TOYOTA	10,000,000.00	3.200	06/17/2015	05/30/2012	1.126	1.142	10,545,000.00	Received	10,614,600.00	10,429,155.52
91159HGZ7	12025	USB	10,000,000.00	1.125	10/30/2013	11/29/2012	0.411	0.417	10,034,600.00	Received	10,068,400.00	10,033,859.14
949746NA5	11025	WELLS	10,000,000.00	0.476	10/28/2015	09/20/2011	1.900	1.928	9,976,000.00	Received	9,450,000.00	9,686,204.33
949746NA5	11081	WELLS	10,000,000.00	0.476	10/28/2015	01/13/2012	1.845	1.871	9,976,000.00	Received	9,484,800.00	9,661,440.00
94974BFK1	12075	WELLS	10,000,000.00	0.906	04/23/2018	04/23/2013	0.906	0.919	10,014,700.00	Received	10,000,000.00	10,000,000.00
94980VAF5	12016	WF	10,000,000.00	0.500	05/16/2016	10/25/2012	1.061	1.076	9,881,000.00	Received	9,803,300.00	9,831,767.74
92976GAC5	12026	WFC	10,000,000.00	0.693	11/03/2014	11/30/2012	0.868	0.880	10,011,900.00	Received	9,967,800.00	9,974,762.16
929903DU3	12062	WFC	10,000,000.00	0.550	06/15/2017	04/01/2013	0.752	0.763	9,909,597.69	2,597.69	9,912,100.00	9,916,439.43
<b>Medium Term Notes Totals</b>			<b>223,985,000.00</b>				<b>1.313</b>	<b>1.331</b>	<b>226,794,751.91</b>	<b>41,331.36</b>	<b>224,934,145.50</b>	<b>224,211,251.47</b>
<b>Negotiable Certificates of Deposit</b>												
06417FRX0	12066	BNSHTX	20,000,000.00	0.180	07/02/2013	04/03/2013	0.180	0.183	19,999,400.00		20,000,000.00	20,000,000.00
65558EKD9	12068	NDAFNY	20,000,000.00	0.190	08/05/2013	04/05/2013	0.190	0.193	19,999,000.00		20,000,000.00	20,000,000.00
74977MV33	12012	RABONY	40,000,000.00	0.390	05/02/2013	10/04/2012	0.380	0.385	40,000,400.00		40,002,328.00	40,000,011.09
8912WHR1	12020	TORDNY	10,000,000.00	0.300	08/12/2013	11/15/2012	0.300	0.304	10,004,900.00		10,000,000.00	10,000,000.00
8912WJ40	12065	TORDNY	20,000,000.00	0.190	09/03/2013	04/03/2013	0.190	0.193	20,002,800.00		20,000,000.00	20,000,000.00
90527M2X3	12021	UBKCTD	10,000,000.00	0.280	07/08/2013	11/15/2012	0.280	0.284	10,001,500.00		10,000,000.00	10,000,000.00
90527M4C7	12032	UBKCTD	30,000,000.00	0.260	06/11/2013	12/10/2012	0.260	0.264	30,004,200.00		30,000,000.00	30,000,000.00
<b>Negotiable Certificates of Deposit Totals</b>			<b>150,000,000.00</b>				<b>0.267</b>	<b>0.270</b>	<b>150,012,200.00</b>	<b>0.00</b>	<b>150,002,328.00</b>	<b>150,000,011.09</b>
<b>Commercial Paper Disc. -Amortizing</b>												
0027A0SA0	12070	ABLLC	40,000,000.00	0.210	05/10/2013	04/10/2013	0.210	0.213	39,997,900.00		39,993,000.00	39,997,900.00
74977KUC1	12063	RABUSA	20,000,000.00	0.170	07/12/2013	04/03/2013	0.170	0.172	19,993,200.00		19,990,555.56	19,993,200.00
89233GWQ5	12064	TOYCC	20,000,000.00	0.220	09/24/2013	04/03/2013	0.220	0.223	19,982,154.00		19,978,733.33	19,982,155.55
89233GW44	12067	TOYCC	10,000,000.00	0.200	09/04/2013	04/05/2013	0.200	0.203	9,993,000.00		9,991,555.56	9,993,000.00
<b>Commercial Paper Disc. -Amortizing Totals</b>			<b>90,000,000.00</b>				<b>0.202</b>	<b>0.205</b>	<b>89,966,254.00</b>	<b>0.00</b>	<b>89,953,844.45</b>	<b>89,966,255.55</b>
<b>Municipal Bonds</b>												
SYS12076	12076	CICF	3,007,134.76	0.400	06/30/2014	04/21/2013	0.395	0.400	3,007,134.76		3,007,134.76	3,007,134.76
<b>Municipal Bonds Totals</b>			<b>3,007,134.76</b>				<b>0.395</b>	<b>0.400</b>	<b>3,007,134.76</b>	<b>0.00</b>	<b>3,007,134.76</b>	<b>3,007,134.76</b>

4.3.6

Portfolio PLCR  
NLI AC  
PM (PRF\_PMS) 7.3.0



**General Fund**  
**Portfolio Management**  
**Investment Status Report - Investments**  
**April 30, 2013**

Page 4

CUSIP	Investment #	Issuer	Par Value	Stated Rate	Maturity Date	Purchase Date	YTM 360	YTM 365	Market Value	Accrued Interest At Purchase	Current Principal	Book Value
PFA - HELICOPTER												
SYS08169	08169	PFA	674,413.00	2.476	04/11/2016	04/09/2009	2.442	2.476	674,413.00		674,413.00	674,413.00
	PFA - HELICOPTER Totals		674,413.00				2.442	2.476	674,413.00	0.00	674,413.00	674,413.00
Local Agency GO Bond												
SYS08244	08244	NEWSD	65,000.00	1.830	07/01/2013	06/24/2009	0.492	0.499	65,000.00		65,000.00	65,000.00
	Local Agency GO Bond Totals		65,000.00				0.492	0.499	65,000.00	0.00	65,000.00	65,000.00
Local Agency Bonds												
SYS05311	05311	MFJPA	77,685,694.00	3.870	04/01/2036	03/29/2006	3.817	3.870	77,685,694.00		77,685,694.00	77,685,694.00
	Local Agency Bonds Totals		77,685,694.00				3.817	3.870	77,685,694.00	0.00	77,685,694.00	77,685,694.00
Rolling Repurchase Agreements - 2												
SYS11085	11085	CF	0.00	0.130		01/17/2012	0.130	0.132	0.00		0.00	0.00
SYS12002	12002	CF	30,074,788.10	0.120		08/08/2012	0.120	0.122	30,074,788.10		30,074,788.10	30,074,788.10
SYS000SWEEP	SWEEP	WFB-S	0.00			03/01/2012	0.000	0.000	0.00		0.00	0.00
	Rolling Repurchase Agreements - 2 Totals		30,074,788.10				0.120	0.122	30,074,788.10	0.00	30,074,788.10	30,074,788.10
mPower Placer												
SYS09460	09460	MPP	990,894.25	3.500		06/24/2010	3.452	3.500	990,894.25		990,894.25	990,894.25
	mPower Placer Totals		990,894.25				3.452	3.500	990,894.25	0.00	990,894.25	990,894.25
	Investment Totals		1,106,482,924.11				1.129	1.145	1,111,483,171.68	53,173.02	1,108,864,529.56	1,106,998,347.15

4.3.7

Data Updated: FUNDSNAP: 05/01/2013 15:07  
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Portfolio PLCR  
NLI AC  
PM (PRF\_PMS) 7.3.0

**General Fund**  
**Portfolio Management**  
**Investment Status Report - Cash**  
**April 30, 2013**

Page 5

CUSIP	Investment #	Issuer	Par Value	Stated Rate	Maturity Date	Purchase Date	YTM 360	YTM 365	Market Value	Accrued Interest At Purchase	Current Principal	Book Value
<b>Cash at Bank</b>												
SYS00000	00000	PLACER	36,166,696.47				0.000	0.000	36,166,696.47		36,166,696.47	36,166,696.47
<b>Undeposited Receipts</b>												
SYS00000VAULT	00000VAULT	PLACER	864,356.33				0.000	0.000	864,356.33		864,356.33	864,356.33
<b>Cash Totals</b>			<b>37,031,052.80</b>							<b>0.00</b>	<b>37,031,052.80</b>	<b>37,031,052.80</b>
<b>Total Cash and Investments</b>			<b>1,143,513,976.91</b>				<b>1.129</b>	<b>1.145</b>	<b>1,148,514,224.48</b>	<b>53,173.02</b>	<b>1,145,895,582.36</b>	<b>1,144,029,399.95</b>

4.3.8

Data Updated: FUNDSNAP: 05/01/2013 15:07  
Run Date: 05/01/2013 - 15:07

Portfolio PLCR  
NLI AC  
PM (PRF\_PMS) 7.3.0



Placer County

General Fund  
Purchases Report  
Sorted by Fund - Fund  
April 1, 2013 - April 30, 2013

CUSIP	Investment #	Fund	Sec. Type	Original Par Value	Purchase Date	Payment Periods	Principal Purchased	Accrued Interest at Purchase	Rate at Purchase	Maturity Date	YTM	Ending Book Value
General Fund												
929903DU3	12062	1010	MTN WFC	10,000,000.00	04/01/2013	06/15 - Quarterly	9,912,100.00	2,597.69	0.550	06/15/2017	0.763	9,916,439.43
06477FRX0	12066	1010	NCB BNSHTX	20,000,000.00	04/03/2013	07/02 - At Maturity	20,000,000.00		0.180	07/02/2013	0.180	20,000,000.00
74977KUC1	12063	1010	ACP RABUSA	20,000,000.00	04/03/2013	07/12 - At Maturity	19,990,555.56		0.170	07/12/2013	0.170	19,993,200.00
89112WJ40	12065	1010	NCB TORNY	20,000,000.00	04/03/2013	09/03 - At Maturity	20,000,000.00		0.190	09/03/2013	0.190	20,000,000.00
89233GWQ5	12064	1010	ACP TOYCC	20,000,000.00	04/03/2013	09/24 - At Maturity	19,978,733.33		0.220	09/24/2013	0.220	19,982,155.55
65558EKD9	12068	1010	NCB NDAFNY	20,000,000.00	04/05/2013	08/05 - At Maturity	20,000,000.00		0.190	08/05/2013	0.190	20,000,000.00
89233GW44	12067	1010	ACP TOYCC	10,000,000.00	04/05/2013	09/04 - At Maturity	9,991,555.56		0.200	09/04/2013	0.200	9,993,000.00
313382QF3	12069	1010	FAC FHLB	10,000,000.00	04/09/2013	10/09 - 04/09	9,997,500.00		1.010	04/09/2018	1.015	9,997,530.56
0027A0SA0	12070	1010	ACP ABLLC	40,000,000.00	04/10/2013	05/10 - At Maturity	39,993,000.00		0.210	05/10/2013	0.210	39,997,900.00
3133ECL44	12072	1010	FAC FFCB	10,000,000.00	04/11/2013	10/11 - 04/11	9,997,500.00		1.000	04/11/2018	1.005	9,997,527.78
3136G1J77	12073	1010	FAC FNMA	10,000,000.00	04/11/2013	10/11 - 04/11	10,000,000.00		0.750	04/11/2018	1.195	10,000,000.00
36962G6Q2	12071	1010	MTN GE CAP	10,000,000.00	04/11/2013	07/08 - Quarterly	10,052,300.00	733.67	0.880	01/08/2016	0.688	10,051,973.89
0027A0RP8	12074	1010	ACP ABLLC	40,000,000.00	04/16/2013	04/23 - At Maturity	39,998,677.78		0.170	04/23/2013	0.170	0.00
SY512076	12076	1010	MUN CIGF	3,007,134.76	04/21/2013	06/30 - At Maturity	3,007,134.76		0.400	06/30/2014	0.400	3,007,134.76
949748FK1	12075	1010	MTN WELLFG	10,000,000.00	04/23/2013	07/23 - Quarterly	10,000,000.00		0.906	04/23/2018	0.906	10,000,000.00
3136G1JY6	12077	1010	FAC FNMA	10,000,000.00	04/24/2013	10/24 - 04/24	9,997,500.00		0.800	04/24/2018	1.150	9,997,509.72
3136G1JY6	12078	1010	FAC FNMA	10,000,000.00	04/24/2013	10/24 - 04/24	10,000,000.00		0.800	04/24/2018	1.145	10,000,000.00
313382RQ8	12079	1010	FAC FHLB	10,000,000.00	04/30/2013	10/30 - 04/30	10,000,000.00		0.750	04/30/2018	1.241	10,000,000.00
3136G1K99	12080	1010	FAC FNMA	10,000,000.00	04/30/2013	10/30 - 04/30	10,000,000.00		0.750	04/30/2018	1.120	10,000,000.00
3136G1K81	12081	1010	FAC FNMA	10,000,000.00	04/30/2013	10/30 - 04/30	10,000,000.00		0.750	04/30/2018	1.120	10,000,000.00
Subtotal				303,007,134.76			302,916,556.99	3,331.36				262,934,371.69
Total Purchases				303,007,134.76			302,916,556.99	3,331.36				262,934,371.69

43.9

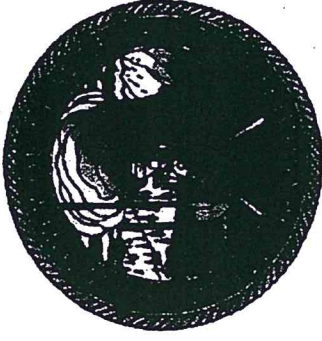
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Run Date: 05/01/2013 - 15:08

Portfolio PLCR  
NLI AC  
PU (PRF\_PU) 7.1.1  
Report Ver. 7.3.3



Office of  
Jenine Windeshausen  
Treasurer-Tax Collector  
County of Placer

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## COUNTY OF PLACER

### TREASURER'S POOLED INVESTMENT REPORT

For the Month of MAY 31, 2013

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2976 Richardson Drive • Auburn, California 95603  
Tax Collector / Business Licenses (530) 889-4120 • Treasurer (530) 889-4140 • Bonds (530) 889-4146

4.3.10

## **PREFACE**

### **Placer County Treasurer's Pooled Investment Report**

**May 31, 2013**

For the purpose of clarity the following glossary of investment terms has been provided.

**Book Value** is the purchase price of a security plus amortization of any premium or discount. This may be more or less than face value, depending upon whether the security was purchased at a premium or at a discount.

**Par Value** is the principal amount of a security and the amount of principal that will be paid at maturity.

**Market Value** is the value at which a security can be sold at the time it is priced or the need to sell arises.

Market values are only relevant if the investment is sold prior to maturity. Profit or loss would be realized only if the specific investment were to be sold.

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### **Government Code 53646 Compliance Report**

The following information is a monthly update of funds on deposit in the Placer County Treasury pursuant to California Government code Section 53646. Further details of individual investments are included in the Treasurer's Monthly Investment Report. All investment transactions and decisions have been made with full compliance with California Government Code and Placer County's Statement of Investment Policy.

Individual securities are priced at the end of each month by Wells Fargo Bank.

The Weighted Average Maturity of the investments with the Treasury is 1,717 days.

The ability of the Placer County Treasury to meet its cash flow needs is demonstrated by \$ 227,884,896.68 in cash and investments maturing in the next 180 days.

4.3.11



**General Fund  
Portfolio Management  
Portfolio Summary  
May 31, 2013**

Investments	Par Value	Market Value	Book Value	% of Portfolio	Term	Days to Maturity	YTM 360 Equiv.	YTM 365 Equiv.
U.S. Treasury Coupons	60,000,000.00	60,547,207.88	60,120,089.49	6.04	1,818	960	1.269	1.287
Federal Agency Coupons	490,000,000.00	487,696,197.22	490,104,035.42	49.21	1,801	1,655	1.082	1.097
Medium Term Notes	202,985,000.00	205,517,149.53	203,356,718.10	20.42	1,373	896	1.317	1.335
Negotiable Certificates of Deposit	110,000,000.00	110,011,500.00	110,000,000.00	11.04	162	47	0.225	0.229
Commercial Paper Disc. -Amortizing	50,000,000.00	49,976,794.45	49,976,794.45	5.02	140	81	0.196	0.199
Municipal Bonds	3,007,134.76	3,007,134.76	3,007,134.76	0.30	435	394	0.395	0.400
PFA - HELICOPTER	674,413.00	674,413.00	674,413.00	0.07	2,559	1,045	2.442	2.476
Local Agency GO Bond	65,000.00	65,000.00	65,000.00	0.01	1,468	30	0.492	0.499
Local Agency Bonds	77,685,694.00	77,685,694.00	77,685,694.00	7.80	10,961	8,340	3.817	3.870
mPower Placer	990,894.25	990,894.25	990,894.25	0.10	1	1	3.452	3.500
<b>Investments</b>	<b>995,408,136.01</b>	<b>996,171,985.09</b>	<b>995,980,773.47</b>	<b>100.00%</b>	<b>2,147</b>	<b>1,717</b>	<b>1.217</b>	<b>1.234</b>

<b>Cash</b>								
Passbook/Checking (not included in yield calculations)	22,819,896.68	22,819,896.68	22,819,896.68		1	1	0.000	0.000
<b>Total Cash and Investments</b>	<b>1,018,228,032.69</b>	<b>1,018,991,881.77</b>	<b>1,018,800,670.15</b>		<b>2,147</b>	<b>1,717</b>	<b>1.217</b>	<b>1.234</b>

Total Earnings	May 31	Month Ending	Fiscal Year To Date
Current Year	972,944.80		12,883,588.37
Average Daily Balance	1,086,756,513.17		993,999,791.67
Effective Rate of Return	1.05%		1.41%

*Kimberly Hawley*  
KIMBERLY HAWLEY, CHIEF DEPUTY TREASURER  
6/10/13

4.3.12



# General Fund

## Portfolio Management

### Portfolio Details - Investments

#### May 31, 2013

Page 1

CUSIP	Investment #	Issuer	Average Balance	Purchase Date	Par Value	Market Value	Book Value	Stated Rate	YTM 360 Days to Maturity	Maturity Date
<b>U.S. Treasury Coupons</b>										
912828JD3	09394	U. S. TREASURY COUPON		03/30/2010	10,000,000.00	10,024,200.00	10,012,357.95	3.375	1.742	29 06/30/2013
912828PJ3	10046	U. S. TREASURY COUPON		12/02/2010	10,000,000.00	10,239,100.00	9,948,437.50	1.375	1.569	912 11/30/2015
912828PJ3	10047	U. S. TREASURY COUPON		12/02/2010	10,000,000.00	10,239,100.00	9,934,375.00	1.375	1.627	912 11/30/2015
912828CJ7	10063	U. S. TREASURY COUPON		12/14/2010	10,000,000.00	10,434,800.00	10,322,851.56	4.750	1.261	348 05/15/2014
912828UJ1	12083	U. S. TREASURY COUPON		05/06/2013	10,000,000.00	9,804,919.02	9,953,273.48	0.625	0.714	1,794 04/30/2018
912828UJ1	12084	U. S. TREASURY COUPON		05/07/2013	10,000,000.00	9,805,088.86	9,948,794.00	0.625	0.701	1,794 04/30/2018
Subtotal and Average			56,606,968.76		60,000,000.00	60,547,207.88	60,120,089.49		1.269	960

#### Federal Agency Coupons

3133ECB45	12038	FEDERAL FARM CREDIT BANK		12/26/2012	10,000,000.00	9,903,500.00	9,990,861.11	0.900	0.908	1,669 12/26/2017
3133ECDE1	12043	FEDERAL FARM CREDIT BANK		01/24/2013	10,000,000.00	9,918,922.22	9,991,228.56	0.940	0.947	1,696 01/22/2018
3133ECEQ3	12048	FEDERAL FARM CREDIT BANK		02/06/2013	10,000,000.00	9,951,400.00	10,000,000.00	1.100	1.085	1,711 02/06/2018
3133ECFA7	12049	FEDERAL FARM CREDIT BANK		02/13/2013	10,000,000.00	9,941,900.00	10,000,000.00	1.080	1.065	1,718 02/13/2018
3133ECJX3	12059	FEDERAL FARM CREDIT BANK		03/26/2013	10,000,000.00	9,902,300.00	9,992,770.83	1.040	1.041	1,759 03/26/2018
3133ECL44	12072	FEDERAL FARM CREDIT BANK		04/11/2013	10,000,000.00	9,885,500.00	9,997,569.44	1.000	0.991	1,775 04/11/2018
313380TD9	12013	FEDERAL HOME LOAN BANK		10/16/2012	10,000,000.00	9,946,000.00	10,000,000.00	1.000	0.986	1,598 10/16/2017
3133813R4	12036	FEDERAL HOME LOAN BANK		12/19/2012	10,000,000.00	9,939,100.00	10,000,000.00	1.000	0.986	1,622 11/09/2017
3133826K4	12054	FEDERAL HOME LOAN BANK		02/27/2013	10,000,000.00	9,947,200.00	10,000,000.00	0.750	1.275	1,732 02/27/2018
313382QF3	12069	FEDERAL HOME LOAN BANK		04/09/2013	10,000,000.00	9,910,700.00	9,997,572.22	1.010	1.001	1,773 04/09/2018
313382RQ8	12079	FEDERAL HOME LOAN BANK		04/30/2013	10,000,000.00	9,918,500.00	10,000,000.00	0.750	1.224	1,794 04/30/2018
3134G2U42	11068	FED HOME LOAN MORT CORP		12/16/2011	10,000,000.00	10,010,100.00	9,998,596.97	0.375	0.407	136 10/15/2013
3136FTK57	11095	FEDERAL NATIONAL MORT. ASSOC.		02/13/2012	10,000,000.00	10,055,100.00	10,000,000.00	0.875	1.345	1,353 02/13/2017
3136G0KV2	11122	FEDERAL NATIONAL MORT. ASSOC.		06/07/2012	10,000,000.00	10,000,800.00	10,000,000.00	1.000	1.276	1,467 06/07/2017
3136G0NC1	11124	FEDERAL NATIONAL MORT. ASSOC.		06/28/2012	10,000,000.00	9,912,900.00	9,993,887.50	0.750	1.336	1,488 06/28/2017
3136G0ZV6	12003	FEDERAL NATIONAL MORT. ASSOC.		08/28/2012	10,000,000.00	10,009,900.00	10,000,000.00	0.700	1.158	1,549 08/28/2017
3136G0B59	12007	FEDERAL NATIONAL MORT. ASSOC.		09/20/2012	10,000,000.00	10,012,000.00	10,000,000.00	0.700	1.080	1,572 09/20/2017
3136G0K34	12008	FEDERAL NATIONAL MORT. ASSOC.		09/25/2012	10,000,000.00	9,928,100.00	10,000,000.00	0.625	1.173	1,577 09/25/2017
3136G0H46	12009	FEDERAL NATIONAL MORT. ASSOC.		09/26/2012	10,000,000.00	10,011,400.00	10,000,000.00	0.600	1.046	1,578 09/26/2017
3136G0N72	12015	FEDERAL NATIONAL MORT. ASSOC.		10/25/2012	10,000,000.00	10,000,800.00	10,000,000.00	0.700	1.029	1,607 10/25/2017
3136G0Y88	12017	FEDERAL NATIONAL MORT. ASSOC.		11/08/2012	10,000,000.00	9,998,300.00	9,997,819.44	0.500	0.990	1,621 11/08/2017
3136G0QW6	12018	FEDERAL NATIONAL MORT. ASSOC.		11/08/2012	10,000,000.00	9,993,400.00	10,000,000.00	1.000	0.986	1,621 11/08/2017
3136G04F5	12024	FEDERAL NATIONAL MORT. ASSOC.		11/21/2012	10,000,000.00	10,014,800.00	10,000,000.00	0.750	1.104	1,634 11/21/2017
3136G12J7	12027	FEDERAL NATIONAL MORT. ASSOC.		12/05/2012	10,000,000.00	9,999,600.00	10,000,000.00	0.600	1.117	1,648 12/05/2017
3136G07K1	12028	FEDERAL NATIONAL MORT. ASSOC.		12/06/2012	10,000,000.00	9,920,500.00	9,995,486.11	0.700	0.998	1,649 12/06/2017
3136G07K1	12029	FEDERAL NATIONAL MORT. ASSOC.		12/06/2012	10,000,000.00	9,920,500.00	10,000,000.00	0.700	0.988	1,649 12/06/2017
3136G12A6	12033	FEDERAL NATIONAL MORT. ASSOC.		12/13/2012	10,000,000.00	9,945,400.00	10,000,000.00	0.700	1.069	1,656 12/13/2017

Data Updated: FUNDSNAP: 06/06/2013 07:36

Run Date: 06/06/2013 - 07:37

Portfolio PLCR  
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PM (PRF\_PMT) 7.3.0

Report Ver. 7.3.3

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**General Fund**  
**Portfolio Management**  
**Portfolio Details - Investments**  
**May 31, 2013**

Page 2

CUSIP	Investment #	Issuer	Average Balance	Purchase Date	Par Value	Market Value	Book Value	Stated Rate	YTM 360	Days to Maturity	Maturity Date
<b>Federal Agency Coupons</b>											
3136G15C9	12035	FEDERAL NATIONAL MORT. ASSOC.		12/19/2012	10,000,000.00	9,910,700.00	10,000,000.00	0.700	1.094	1,662	12/19/2017
3136G15K1	12039	FEDERAL NATIONAL MORT. ASSOC.		12/27/2012	10,000,000.00	9,971,900.00	10,000,000.00	0.500	1.116	1,670	12/27/2017
3136G16W4	12040	FEDERAL NATIONAL MORT. ASSOC.		12/27/2012	10,000,000.00	9,929,800.00	9,998,171.11	0.650	0.645	1,670	12/27/2017
3136G1BA6	12045	FEDERAL NATIONAL MORT. ASSOC.		01/30/2013	10,000,000.00	9,974,200.00	9,998,134.44	0.700	1.134	1,704	01/30/2018
3136G1BD0	12046	FEDERAL NATIONAL MORT. ASSOC.		01/30/2013	10,000,000.00	9,933,300.00	10,000,000.00	0.750	1.031	1,704	01/30/2018
3136G1B57	12047	FEDERAL NATIONAL MORT. ASSOC.		01/30/2013	10,000,000.00	9,967,300.00	10,000,000.00	0.750	1.031	1,704	01/30/2018
3136G1CU1	12053	FEDERAL NATIONAL MORT. ASSOC.		02/22/2013	10,000,000.00	9,950,808.33	9,986,033.79	0.750	1.135	1,726	02/21/2018
3136G1DB2	12055	FEDERAL NATIONAL MORT. ASSOC.		02/28/2013	10,000,000.00	9,978,400.00	10,000,000.00	1.000	1.170	1,733	02/28/2018
3135G0JX9	12056	FEDERAL NATIONAL MORT. ASSOC.		02/28/2013	10,000,000.00	9,962,100.00	10,000,000.00	1.200	1.184	1,733	02/28/2018
3136G1F95	12057	FEDERAL NATIONAL MORT. ASSOC.		02/28/2013	10,000,000.00	10,007,500.00	9,995,258.33	0.750	1.259	1,733	02/28/2018
3135G0VG5	12058	FEDERAL NATIONAL MORT. ASSOC.		03/13/2013	10,000,000.00	10,107,700.00	10,138,716.67	1.500	1.184	1,746	03/13/2018
3136G1GS2	12060	FEDERAL NATIONAL MORT. ASSOC.		03/27/2013	10,000,000.00	9,967,600.00	10,000,000.00	0.500	1.226	1,760	03/27/2018
3136G1HB8	12061	FEDERAL NATIONAL MORT. ASSOC.		03/28/2013	10,000,000.00	9,951,100.00	10,000,000.00	0.800	1.100	1,761	03/28/2018
3136G1JT7	12073	FEDERAL NATIONAL MORT. ASSOC.		04/11/2013	10,000,000.00	9,956,200.00	10,000,000.00	0.750	1.178	1,775	04/11/2018
3136G1JV6	12077	FEDERAL NATIONAL MORT. ASSOC.		04/24/2013	10,000,000.00	9,929,400.00	9,997,551.39	0.800	1.134	1,788	04/24/2018
3136G1JV6	12078	FEDERAL NATIONAL MORT. ASSOC.		04/24/2013	10,000,000.00	9,929,400.00	10,000,000.00	0.800	1.129	1,788	04/24/2018
3136G1K99	12080	FEDERAL NATIONAL MORT. ASSOC.		04/30/2013	10,000,000.00	9,902,300.00	10,000,000.00	0.750	1.104	1,794	04/30/2018
3136G1K81	12081	FEDERAL NATIONAL MORT. ASSOC.		04/30/2013	10,000,000.00	9,947,600.00	10,000,000.00	0.750	1.104	1,794	04/30/2018
3135G0WB5	12082	FEDERAL NATIONAL MORT. ASSOC.		05/02/2013	10,000,000.00	9,928,466.67	10,034,377.51	1.200	1.110	1,782	04/18/2018
3136G1LA5	12086	FEDERAL NATIONAL MORT. ASSOC.		05/15/2013	10,000,000.00	9,923,200.00	10,000,000.00	0.500	1.126	1,809	05/15/2018
3136G1KV0	12087	FEDERAL NATIONAL MORT. ASSOC.		05/15/2013	10,000,000.00	9,874,400.00	10,000,000.00	0.750	1.090	1,809	05/15/2018
3136G1M63	12088	FEDERAL NATIONAL MORT. ASSOC.		05/22/2013	10,000,000.00	9,851,200.00	10,000,000.00	0.750	1.126	1,816	05/22/2018
Subtotal and Average					490,000,000.00	487,696,197.22	490,104,035.42		1.082	1,655	

<b>Medium Term Notes</b>											
037833AG5	12085	Apple Inc.		05/07/2013	10,000,000.00	10,029,581.22	10,040,135.50	0.523	0.436	1,797	05/03/2018
36982G4Q4	10026	General Electric Company		10/15/2010	5,000,000.00	5,022,300.00	5,004,995.24	1.875	1.502	107	09/16/2013
36982GN1	10002	GENERAL ELECTRIC CAPITAL CORP		08/11/2010	10,000,000.00	10,082,700.00	9,997,805.56	1.025	1.353	801	08/11/2015
36982G4N1	10003	GENERAL ELECTRIC CAPITAL CORP		08/18/2010	10,000,000.00	10,082,700.00	9,991,187.95	1.025	1.379	801	08/11/2015
36982G4S0	10056	GENERAL ELECTRIC CAPITAL CORP		12/08/2010	10,000,000.00	10,020,700.00	9,983,045.61	0.934	1.258	851	09/30/2015
36982G4L5	11053	GENERAL ELECTRIC CAPITAL CORP		11/21/2011	10,000,000.00	10,539,600.00	10,272,115.25	3.500	2.103	758	06/29/2015
36982G5Q3	11090	GENERAL ELECTRIC CAPITAL CORP		01/31/2012	10,000,000.00	9,999,600.00	10,000,000.00	1.026	1.149	608	01/30/2015
36982G5J4	12014	GENERAL ELECTRIC CAPITAL CORP		10/22/2012	7,985,000.00	7,944,036.95	7,998,851.42	0.777	0.754	681	04/13/2015
36982G6Q2	12071	GENERAL ELECTRIC CAPITAL CORP		04/11/2013	10,000,000.00	10,052,433.67	10,050,384.23	0.880	0.678	951	01/08/2016
46623EJC4	10034	JP MORGAN CHASE BANK		11/08/2010	10,000,000.00	10,023,200.00	10,005,025.45	1.034	0.957	121	09/30/2013
46625HHW3	11094	JP MORGAN CHASE BANK		02/13/2012	10,000,000.00	10,343,900.00	10,117,532.01	2.600	2.101	958	01/15/2016

Data Updated: FUNDSNAP: 06/06/2013 07:36

Run Date: 06/06/2013 - 07:37

Portfolio PLCR  
NLI AC  
PM (PRF\_PN2) 7.3.0

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**General Fund**  
**Portfolio Management**  
**Portfolio Details - Investments**  
**May 31, 2013**

Page 3

CUSIP	Investment #	Issuer	Average Balance	Purchase Date	Par Value	Market Value	Book Value	Stated Rate	YTM 360	Days to Maturity	Maturity Date
<b>Medium Term Notes</b>											
46625HJUA9	11089	JP MORGAN CHASE BANK		03/09/2012	10,000,000.00	10,536,500.00	10,224,947.81	3.150	2.348	1,130	07/05/2016
48126EAA5	12010	JP MORGAN CHASE BANK		09/26/2012	10,000,000.00	10,106,300.00	10,108,364.18	2.000	1.706	1,536	08/15/2017
594918AG9	10089	Microsoft Corp		12/17/2010	10,000,000.00	10,257,500.00	9,878,443.77	1.625	2.150	846	09/25/2015
89233P4B9	11121	TOYOTA MOTOR CREDIT		05/30/2012	10,000,000.00	10,501,800.00	10,412,347.86	3.200	1.126	746	06/17/2015
91159HGZ7	12025	US BANCORP		11/29/2012	10,000,000.00	10,025,700.00	10,027,041.86	1.125	0.411	151	10/30/2013
949746NA5	11025	WELLS FARGO & CO.		09/20/2011	10,000,000.00	9,976,600.00	9,677,388.06	0.476	1.900	879	10/28/2015
949746NA5	11081	WELLS FARGO & CO.		01/13/2012	10,000,000.00	9,976,600.00	9,672,763.08	0.476	1.845	879	10/28/2015
94974BFK1	12075	WELLS FARGO & CO.		04/23/2013	10,000,000.00	10,062,300.00	10,000,000.00	0.906	0.906	1,787	04/23/2018
92976GAC5	12026	WACHOVIA MORTGAGE FSB		11/30/2012	10,000,000.00	10,021,600.00	9,976,182.08	0.653	0.827	520	11/03/2014
929903DU3	12062	WACHOVIA MORTGAGE FSB		04/01/2013	10,000,000.00	9,911,497.69	9,918,181.18	0.550	0.752	1,475	06/15/2017
		<b>Subtotal and Average</b>	<b>207,805,652.22</b>		<b>202,985,000.00</b>	<b>205,517,149.53</b>	<b>203,356,718.10</b>		<b>1.317</b>	<b>896</b>	
<b>Negotiable Certificates of Deposit</b>											
06417FRX0	12086	BANK OF NOVA SCOTIA HOUS		04/03/2013	20,000,000.00	20,000,600.00	20,000,000.00	0.180	0.180	31	07/02/2013
65558EKD9	12088	NORDEA BANK FINLAND NY		04/05/2013	20,000,000.00	20,000,800.00	20,000,000.00	0.190	0.190	65	08/05/2013
89112WHR1	12020	Toronton Dominion Bank NY		11/15/2012	10,000,000.00	10,003,800.00	10,000,000.00	0.300	0.300	72	08/12/2013
89112WJ40	12065	Toronton Dominion Bank NY		04/03/2013	20,000,000.00	20,003,200.00	20,000,000.00	0.190	0.190	94	09/03/2013
90527M2X3	12021	Union Bank NA		11/15/2012	10,000,000.00	10,001,600.00	10,000,000.00	0.280	0.280	37	07/08/2013
90527M4C7	12032	Union Bank NA		12/10/2012	30,000,000.00	30,001,500.00	30,000,000.00	0.260	0.260	10	06/11/2013
		<b>Subtotal and Average</b>	<b>111,290,322.58</b>		<b>110,000,000.00</b>	<b>110,011,500.00</b>	<b>110,000,000.00</b>		<b>0.225</b>	<b>47</b>	
<b>Commercial Paper Disc. -Amortizing</b>											
74977KUC1	12063	RABOBANK USA FIN CORP		04/03/2013	20,000,000.00	19,996,127.78	19,996,127.78	0.170	0.170	41	07/12/2013
89233GWQ5	12064	Toyota Motor Credit Corp		04/03/2013	20,000,000.00	19,985,944.44	19,985,944.44	0.220	0.220	115	09/24/2013
89233GW44	12067	Toyota Motor Credit Corp		04/05/2013	10,000,000.00	9,994,722.23	9,994,722.23	0.200	0.200	95	09/04/2013
		<b>Subtotal and Average</b>	<b>61,585,343.37</b>		<b>50,000,000.00</b>	<b>49,976,794.45</b>	<b>49,976,794.45</b>		<b>0.196</b>	<b>81</b>	
<b>Municipal Bonds</b>											
SYS12076	12076	City of Colfax		04/21/2013	3,007,134.76	3,007,134.76	3,007,134.76	0.400	0.395	394	06/30/2014
		<b>Subtotal and Average</b>	<b>3,007,134.76</b>		<b>3,007,134.76</b>	<b>3,007,134.76</b>	<b>3,007,134.76</b>		<b>0.395</b>	<b>394</b>	
<b>PFA - HELICOPTER</b>											
SYS08169	08169	Public Finance Authority		04/09/2009	674,413.00	674,413.00	674,413.00	2.476	2.442	1,045	04/11/2016
		<b>Subtotal and Average</b>	<b>674,413.00</b>		<b>674,413.00</b>	<b>674,413.00</b>	<b>674,413.00</b>		<b>2.442</b>	<b>1,045</b>	

Portfolio PLCR  
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Data Updated: FUNDSNAP: 06/06/2013 07:36  
Run Date: 06/06/2013 - 07:37

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**General Fund**  
**Portfolio Management**  
**Portfolio Details - Investments**  
**May 31, 2013**

Page 4

CUSIP	Investment #	Issuer	Average Balance	Purchase Date	Par Value	Market Value	Book Value	Stated Rate	YTM 360	Days to Maturity	Maturity Date
<b>Local Agency GO Bond</b>											
SYS08244	08244	Newcastle Elem. School Distric		06/24/2009	65,000.00	65,000.00	65,000.00	1.830	0.492	30	07/01/2013
		Subtotal and Average	65,000.00		65,000.00	65,000.00	65,000.00		0.492	30	
<b>Local Agency Bonds</b>											
SYS05311	05311	MIDDLE FORK JPA		03/29/2006	77,685,694.00	77,685,694.00	77,685,694.00	3.870	3.817	8,340	04/01/2036
		Subtotal and Average	77,685,694.00		77,685,694.00	77,685,694.00	77,685,694.00		3.817	8,340	
<b>Rolling Repurchase Agreements - 2</b>											
SYS11085	11085	CANTOR FITZGERALD		01/17/2012	0.00	0.00	0.00	0.130	0.130	1	
SYS000SWEEP	SWEEP	WFB REPURCHASE-SWEEP		03/01/2012	0.00	0.00	0.00		0.000	1	
		Subtotal and Average	26,511,494.98		0.00	0.00	0.00		0.000	0	
<b>mPower Placer</b>											
SYS09460	09460	mPower Placer		06/24/2010	990,894.25	990,894.25	990,894.25	3.500	3.452	1	
		Subtotal and Average	990,894.25		990,894.25	990,894.25	990,894.25		3.452	1	
		Total and Average	1,086,756,513.17		995,408,136.01	996,171,985.09	995,980,773.47		1.217	1,717	

4.3.16

Portfolio PLCR  
NLI AC  
PM (PRF\_PM2) 7.3.0

**General Fund**  
**Portfolio Management**  
**Portfolio Details - Cash**  
**May 31, 2013**

Page 5

CUSIP	Investment #	Issuer	Average Balance	Purchase Date	Par Value	Market Value	Book Value	Stated Rate	YTM	Days to 360 Maturity
<b>Cash at Bank</b>										
SYS00000	00000	PLACER COUNTY CASH			22,564,504.55	22,564,504.55	22,564,504.55		0.000	1
<b>Undeposited Receipts</b>										
SYS00000VAULT	00000VAULT	PLACER COUNTY CASH			255,392.13	255,392.13	255,392.13		0.000	1
		Average Balance	0.00							1
<b>Total Cash and Investments</b>					1,018,228,032.69	1,018,991,881.77	1,018,800,670.15		1.217	1,717

Data Updated: FUNDSNAP: 06/06/2013 07:36  
Run Date: 06/06/2013 - 07:37

Portfolio PLCR  
NLI AC  
PM (PRF\_PM2) 7.3.0

43.17



Placer County

General Fund  
Purchases Report  
Sorted by Fund - Fund  
May 1, 2013 - May 31, 2013

CUSIP	Investment #	Fund	Sec. Type	Issuer	Original Par Value	Purchase Date	Payment Periods	Principal Purchased	Accrued Interest at Purchase	Rate at Purchase	Maturity Date	YTM	Ending Book Value
General Fund													
3135G0WB5	12082	1010	FAC	FNMA	10,000,000.00	05/02/2013	10/18 - 04/18	10,036,000.00	4,666.67	1.200	04/18/2018	1.125	10,034,377.51
912828UZ1	12083	1010	TRC	UST	10,000,000.00	05/06/2013	10/31 - 04/30	9,951,562.50	1,019.02	0.625	04/30/2018	0.724	9,953,273.48
037833AG5	12085	1010	MTN	AAPL	10,000,000.00	05/07/2013	08/03 - Quarterly	10,040,090.00	561.22	0.523	05/03/2018	0.442	10,040,135.50
912828UZ1	12084	1010	TRC	UST	10,000,000.00	05/07/2013	10/31 - 04/30	9,946,875.00	1,188.86	0.625	04/30/2018	0.710	9,948,794.00
3136G1LA5	12086	1010	FAC	FNMA	10,000,000.00	05/15/2013	11/15 - 05/15	10,000,000.00		0.500	05/15/2018	1.141	10,000,000.00
3136G1KV0	12087	1010	FAC	FNMA	10,000,000.00	05/15/2013	11/15 - 05/15	10,000,000.00		0.750	05/15/2018	1.105	10,000,000.00
3136G1M63	12088	1010	FAC	FNMA	10,000,000.00	05/22/2013	11/22 - 05/22	10,000,000.00		0.750	05/22/2018	1.141	10,000,000.00
			Subtotal		70,000,000.00			69,974,527.50	7,455.77				69,976,580.49
			Total Purchases		70,000,000.00			69,974,527.50	7,455.77				69,976,580.49

4.3.18

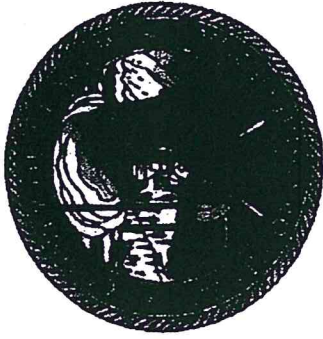
Data Updated: FUNDSNAP: 06/06/2013 07:36  
Run Date: 06/06/2013 - 07:36

Portfolio PLCR  
NLI AC  
PU (PRF,PU) 7.1.1  
Report Ver. 7.3.3



Office of  
Jenine Windeshausen  
Treasurer-Tax Collector  
County of Placer

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## COUNTY OF PLACER

### TREASURER'S POOLED INVESTMENT REPORT

For the Month of JUNE 30, 2013 (Corrected)

4.3.19

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2976 Richardson Drive • Auburn, California 95603  
Tax Collector / Business Licenses (530) 889-4120 • Treasurer (530) 889-4140 • Bonds (530) 889-4146

## **PREFACE**

### **Placer County Treasurer's Pooled Investment Report**

**June 30, 2013**

For the purpose of clarity the following glossary of investment terms has been provided.

**Book Value** is the purchase price of a security plus amortization of any premium or discount. This may be more or less than face value, depending upon whether the security was purchased at a premium or at a discount.

**Par Value** is the principal amount of a security and the amount of principal that will be paid at maturity.

**Market Value** is the value at which a security can be sold at the time it is priced or the need to sell arises.

Market values are only relevant if the investment is sold prior to maturity. Profit or loss would be realized only if the specific investment were to be sold.

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### **Government Code 53646 Compliance Report**

The following information is a monthly update of funds on deposit in the Placer County Treasury pursuant to California Government code Section 53646. Further details of individual investments are included in the Treasurer's Monthly Investment Report. All investment transactions and decisions have been made with full compliance with California Government Code and Placer County's Statement of Investment Policy.

Individual securities are priced at the end of each month by Wells Fargo Bank.

The Weighted Average Maturity of the investments with the Treasury is 1,688 days.

The ability of the Placer County Treasury to meet its cash flow needs is demonstrated by \$ 165,065,000.00 in cash and investments maturing in the next 180 days.

4.3.20



Placer County

General Fund  
Portfolio Management  
Portfolio Summary  
June 30, 2013

Investments	Par Value	Market Value	Book Value	% of Portfolio	Term	Days to Maturity	YTM 360 Equiv.	YTM 365 Equiv.
U.S. Treasury Coupons	50,000,000.00	50,151,907.88	50,085,428.95	5.10	1,704	1,117	1.175	1.191
Federal Agency Coupons	470,000,000.00	461,443,497.22	470,103,023.02	47.85	1,800	1,633	1.073	1.087
Medium Term Notes	202,985,000.00	203,967,878.69	203,219,293.18	20.69	1,392	909	1.267	1.285
Negotiable Certificates of Deposit	80,000,000.00	80,005,500.00	80,000,000.00	8.14	154	31	0.213	0.215
Commercial Paper Disc. -Amortizing	50,000,000.00	49,984,961.11	49,984,961.11	5.09	140	51	0.196	0.199
PFA - HELICOPTER	674,413.00	674,413.00	674,413.00	0.07	2,559	1,015	2.442	2.476
Local Agency GO Bond	65,000.00	65,000.00	65,000.00	0.01	1,468	0	0.492	0.499
Local Agency Bonds	79,785,694.00	79,785,694.00	79,785,694.00	8.12	10,683	8,101	3.736	3.788
Rolling Repurchase Agreements - 2	46,544,113.17	46,544,113.17	46,544,113.17	4.74	1	1	0.000	0.000
mPower Placer	952,488.18	952,488.18	952,488.18	0.10	1	1	3.452	3.500
Municipal Bonds *	1,007,134.76	1,007,134.76	1,007,134.76	0.10	435	364	0.395	0.400
Investments	982,013,843.11	974,582,588.01	982,421,549.37	100.00%	2,126	1,691	1.171	1.188

Cash, Pending Redemptions	56,259,879.87	56,259,879.87	56,259,879.87	1	1	0.000	0.000
Passbook/Checking (not included in yield calculations)							
Pending Redemptions	10,000,000.00	10,000,000.00	10,000,000.00				
Subtotal		66,259,879.87	66,259,879.87				
Total Cash, Pending Redemptions and Investments	1,048,273,722.98	1,040,842,467.88	1,048,681,429.24	2,126	1,691	1.171	1.188

Total Earnings	June 30 Month Ending	Fiscal Year To Date	Fiscal Year Ending
Current Year	1,096,858.64	13,980,314.90	13,980,314.90
Average Daily Balance	1,007,384,063.18	995,099,868.78	
Effective Rate of Return	1.32%	1.40%	

*Jennie Windhausen*  
JENNIE WINDESHAUSEN, TREASURER-TAX COLLECTOR

Reporting period 06/01/2013-06/30/2013  
Data Updated: FUNDSNAP: 07/23/2013 09:25  
Run Date: 07/23/2013 - 09:25

Portfolio FY13  
NLI AC  
PM (PRF\_PMT) 7.3.0  
Report Ver. 7.3.3

4,321



**General Fund**  
**Portfolio Management**  
**Portfolio Details - Pending Redemptions**  
**June 30, 2013**

Page 1

Security #	Investment #	Issuer	Purchase Settlement Date	Mat/Sale Settlement Date	Par Value
U.S. Treasury Coupons					
912828JD3	09394	U. S. TREASURY COUPON	03/30/2010	06/30/2013	10,000,000.00
				Subtotal	10,000,000.00
		Total Pending Redemptions			10,000,000.00

Data Updated: FUNDSNAP: 07/19/2013 15:05  
Run Date: 07/19/2013 - 15:05

Portfolio FY13  
NLI AC  
PM (PRE\_PMT) 7.3.0  
Report Ver: 7.3.3

4.3.22

**General Fund**  
**Portfolio Management**  
**Portfolio Details - Investments**  
**June 30, 2013**

Page 4

CUSIP	Investment #	Issuer	Average Balance	Purchase Date	Par Value	Market Value	Book Value	Stated Rate	YTM 360	Days to Maturity	Maturity Date
<b>Rolling Repurchase Agreements - 2</b>											
SYS11085	11085	CANTOR FITZGERALD		01/17/2012	0.00	0.00	0.00	0.130	0.130	1	
SYS000SWEEP	SWEEP	WFB REPURCHASE-SWEEP		03/01/2012	46,544,113.17	46,544,113.17	46,544,113.17		0.000	1	
		<b>Subtotal and Average</b>	<b>7,144,321.57</b>		<b>46,544,113.17</b>	<b>46,544,113.17</b>	<b>46,544,113.17</b>		<b>0.000</b>	<b>1</b>	
<b>mPower Placer</b>											
SYS09460	09460	mPower Placer		06/24/2010	952,488.18	952,488.18	952,488.18	3.500	3.452	1	
		<b>Subtotal and Average</b>	<b>960,169.39</b>		<b>952,488.18</b>	<b>952,488.18</b>	<b>952,488.18</b>		<b>3.452</b>	<b>1</b>	
<b>Municipal Bonds *</b>											
12076	12076	City of Colfax		04/21/2013	1,007,134.76	1,007,134.76	1,007,134.76	0.400	0.395	364	06/30/2014
		<b>Subtotal and Average</b>	<b>2,607,134.76</b>		<b>1,007,134.76</b>	<b>1,007,134.76</b>	<b>1,007,134.76</b>		<b>0.395</b>	<b>364</b>	
		<b>Total and Average</b>	<b>1,007,384,063.18</b>		<b>982,013,843.11</b>	<b>974,582,588.01</b>	<b>982,421,549.37</b>		<b>1.171</b>	<b>1,691</b>	

Data Updated: FUNDSNAP: 07/19/2013 15:06  
Run Date: 07/19/2013 - 15:06

Portfolio FY13  
NL: AC  
PM (PRF\_PMT) 7.3.0

4.3.23

**General Fund**  
**Portfolio Management**  
**Portfolio Details - Cash**  
**June 30, 2013**

Page 5

CUSIP	Investment #	Issuer	Average Balance	Purchase Date	Par Value	Market Value	Book Value	Stated Rate	YTM	Days to 360 Maturity
<b>Cash at Bank</b>										
SYS00000	00000	PLACER COUNTY CASH			55,276,629.93	55,276,629.93	55,276,629.93		0.000	1
<b>Undeposited Receipts</b>										
SYS00000VAULT	00000VAULT	PLACER COUNTY CASH			983,249.94	983,249.94	983,249.94		0.000	1
		Average Balance	0.00							1
<b>Total Cash and Investments</b>					1,038,273,722.98	1,030,842,467.88	1,038,681,429.24		1.171	1,691

43.24



# WESTERN PLACER UNIFIED SCHOOL DISTRICT BOARD OF TRUSTEES MEETING FACT SHEET

**MISSION STATEMENT:** Empower Students with the skills, knowledge, and attitudes for Success in an Ever Changing World.

## DISTRICT GLOBAL GOALS

1. Develop and continually upgrade a well articulated K-12 academic program that challenges all students to achieve their highest potential, with a special emphasis on students
2. Foster a safe, caring environment where individual differences are valued and respected.
3. Provide facilities for all district programs and functions that are suitable in terms of function, space, cleanliness and attractiveness.
4. Promote the involvement of the community, parents, local government, business, service organizations, etc. as partners in the education of the students.
5. Promote student health and nutrition in order to enhance readiness for learning.

**SUBJECT:**

2013-14 Agricultural Career Technical Education  
Incentive Grant

**AGENDA ITEM AREA:**

Consent

**REQUESTED BY:**

Audrey Kilpatrick  
Assistant Superintendent, Business & Operations

**ENCLOSURES:**

Yes

**DEPARTMENT:**

Business Services

**FINANCIAL INPUT/SOURCE:**

Grant Revenues

**MEETING DATE:**

August 20, 2013

**ROLL CALL REQUIRED:**

No

---

**BACKGROUND:**

Each year the District applies for, and receives, an Agricultural Career Technical Education Incentive Grant from the State of California. Funds from the grant are used for supplies, travel, conference fees and vehicle payments at the Lincoln High School Farm.

**RECOMMENDATION:**

Administration recommends the Board approve the 2013-14 Agricultural Career Technical Education Incentive Grant.

California Department of Education  
**DRAFT AGRICULTURAL CAREER TECHNICAL EDUCATION INCENTIVE GRANT**  
**2013-14 APPLICATION FOR FUNDING**

(Due Date: To be received in Regional Supervisor's Office by June 30, 2013)

**DATES OF PROJECT DURATION - JULY 1, 2013, TO JUNE 30, 2014**

Lincoln High School

(School Site)

Western Placer Unified

(District)

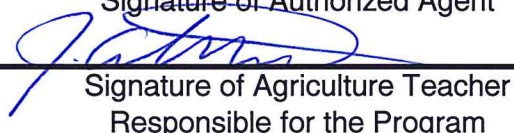
**Certification:** I hereby certify that all applicable state and federal rules and regulations will be observed; that to the best of my knowledge, the information contained in this application is correct and complete; and that the attached assurances are accepted as the basic conditions of the operations in this project/program for local participation and assistance.



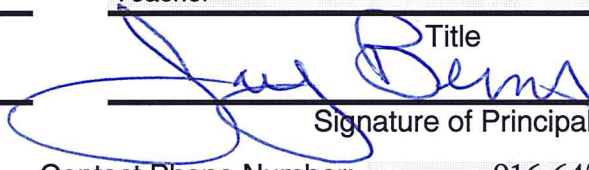
Signature of Authorized Agent

Teacher

Title



Signature of Agriculture Teacher  
Responsible for the Program



Signature of Principal

Contact Phone Number: 916-645-6360

Date of Approval of Local Agency Board:

8/20/2013

Funds Requested - Part I

\$5,000.00

Part II

\$2,232.00

Part III

\$8,000.00

Part IV

\$0.00

Total

\$15,232.00

Number of Different Agriculture Teachers at Site:

3

**PART I - QUALITY CRITERIA 1-9 (REQUIRED) ALLOCATION**

Quality Criteria	Will Meet Criteria	Variance Requested
1. Curriculum and Instruction	x	
2. Leadership and Citizenship Development	x	
3. Practical Application of Occupational Skills	x	
4. Qualified and Competent Personnel	x	
5. Facilities, Equipment, and Materials	x	
6. Community, Business, and Industry Involvement	x	
7. Career Guidance	x	
8. Program Promotion	x	
9. Program Accountability and Planning	x	

**Formal Variance Request must be included if requesting a variance.** A variance is a proposed plan for bringing the program into compliance with required quality criteria. Variances should result in compliance prior to the following year's application. All variances must be approved with the application. Non-compliance with the terms of the approved variance will result in a loss of funds.



PART I - CONTINUED

Departmental Allocation: Meeting the criteria in PART I makes the program eligible for the following amounts based on the number of teachers in the program.

Total Number of Teachers	Amount Eligible	Amount Requested
One Teacher or Less	\$4,000	
Two Teachers	\$4,500	
Three Teachers or More	\$5,000	\$5,000.00

PART II - PROGRAM ENROLLMENT ALLOCATION

Total Number of Students	2012-13 R2 Number	Amount Requested
List Number from R2 Report (\$8/Member)	279	\$2,232.00

PART III - QUALITY CRITERIA 10-11 (OPTIONAL) ALLOCATION

Schools which qualify for a Departmental Allocation may apply for additional amounts for each specific Quality Criteria (10 and 11) met.

- \* Amounts requested in Quality Criterion 10 will be the indicated amount for that criterion, multiplied by the full-time equivalent (FTE). To count a preparation period, the teacher must be teaching Career Technical Education courses in Agriculture for 50 percent or more of their teaching periods.
- \* Amounts requested in Quality Criterion 11A will be the indicated amount for each teacher who was compensated a minimum of \$2,000 for year-round employment.
- \* Amounts requested in Quality Criterion 11B will be the indicated amount for each teacher who is provided a project supervision period. Project periods will be counted if the teacher has a preparation period as part of the regular teaching day.

Number of FTE Agriculture Teachers at Site:

3

List the Names of the Agriculture Teachers:

Barret Hess

Jessica Armistead

Cassandra Walker

5.

Mike Trueblood

6.

	Number Meeting Criteria	Amount Requested
Criterion 10 - Student/Teacher Ratio	0	\$0.00
Criterion 11A - Year-Round Employment	4	\$8,000.00
Criterion 11B - Project Supervision Period	0	\$0.00

TOTAL FUNDS REQUESTED PART IV

\$8,000.00

PART IV - QUALITY CRITERION 12 (OPTIONAL) ALLOCATION

Quality Criterion 12 Form is attached and all criteria has been met. If the answer is yes, list \$7,500 (funds requesting) in space to the right.



PART V - FINANCIAL SCHEDULE

Part A

			A	B		C
Line	Acct. No.	Classification	Description of Item for Which Funds Will be Expended	Incentive Grant Funds		Matching Funds
1	4000	Books & Supplies		8,632.00		8,632.00
2			Subtotal for 4000	<b>\$8,632.00</b>		<b>\$8,632.00</b>
3	5000	Services and Other Operating Expenses such as: Services of Consultants, Staff Travel, and Conference; Rentals, Leases, and Repairs; Bus Transportation	1. National Convention	2,000.00		2,000.00
4			2. CATA Conference	3,000.00		3,000.00
5			3. FFA Field days and C	800.00		800.00
6			4. State FFA Conv	800.00		800.00
			5.			
7			6.			
8			Subtotal for 5000	<b>\$6,600.00</b>		<b>\$6,600.00</b>
9	6000	Capital Outlay: Includes Sites and Improvements of Sites; Buildings and Improvement of Buildings; Equipment	1.			
10			2.			
11			3.			
			4.			
12			5.			
13			Subtotal for 6000	<b>\$0.00</b>		<b>\$0.00</b>
14			Total for 4000–6000 Lines 2, 8, 13	<b>\$15,232.00</b>		<b>\$15,232.00</b>

TOTAL 2013–14 Incentive Grant Allocation:

**\$15,232.00**

Part B - Complete this portion if a waiver of the matching requirement is requested:

			A	B		C
Line	Acct. No.	Classification	Description of Item for Which Funds Were Expended	Incentive Grant Funds		Amount of Salary and Benefits
15	1000	Salaries	Teachers' Summer Service Salaries			
16	1000	Salaries	Teachers' Salaries for Project Supervision Period			
17	3000	Benefits	Benefits for the Above Items (1000)			
18			TOTAL			<b>\$0.00</b>

TOTAL Amount of Waiver Requested:

# WESTERN PLACER UNIFIED SCHOOL DISTRICT BOARD OF TRUSTEES MEETING FACT SHEET

**MISSION STATEMENT:** Empower Students with the skills, knowledge, and attitudes for Success in an Ever Changing World.

## DISTRICT GLOBAL GOALS

1. Develop and continually upgrade a well articulated K-12 academic program that challenges all students to achieve their highest potential, with a special emphasis on students
2. Foster a safe, caring environment where individual differences are valued and respected.
3. Provide facilities for all district programs and functions that are suitable in terms of function, space, cleanliness and attractiveness.
4. Promote the involvement of the community, parents, local government, business, service organizations, etc. as partners in the education of the students.
5. Promote student health and nutrition in order to enhance readiness for learning.

### SUBJECT:

Agreement to Furnish Food Service between  
KidZKount: Placer Community Action Council, Inc.,  
and WPUSD

### AGENDA ITEM AREA:

Consent

### REQUESTED BY:

Audrey Kilpatrick   
Assistant Superintendent , Business & Operations

### ENCLOSURES:

Yes

### DEPARTMENT:

Business Services

### FINANCIAL INPUT/SOURCE:

Food Service

### MEETING DATE:

August 20, 2013

### ROLL CALL REQUIRED:

No

---

### BACKGROUND:

In order to meet the nutritional needs of students enrolled in the KidZKount Program, the district has contracted with KidZKount: Placer Community Action Council, Inc., to provide lunch meals to students enrolled in the Carlin C. Coppin Head Start program during the 2013-14 school year. The meals will be provided on a cost reimbursement basis.

### RECOMMENDATION:

Staff recommends the Board of Trustees ratify the agreement for food service between KidZKount: Placer Community Action Council, Inc., and Western Placer Unified School District.



## AGREEMENT TO FURNISH FOOD SERVICE

Between a Child Care Food Program Sponsor  
And a Food Service Management Company

School Year 2013-2014

This agreement is entered into between:

Agency: **KidZKount: Placer Community Action Council, Inc.**  
1166 High Street  
Auburn, CA 95603  
*hereinafter referred to as the KidZKount, and*

Vendor: **Western Placer Unified School District**  
600 6<sup>th</sup> Street, Suite 400  
Lincoln, CA 95648  
*hereinafter referred to as the Vendor*

**WHEREAS**, it is not within the capacity of **KidZKount** to prepare specified meals under the Child Care Food Program for enrolled participating children, and

**WHEREAS**, the facilities and capabilities of the **Vendor** are adequate to prepare and deliver specified meals to **KidZKount's** facilities, and

**WHEREAS**, the **Vendor** is willing to provide such services to the **KidZKount** on a cost reimbursement basis:

**THEREFORE**, both parties hereto agree as follows:

### THE VENDOR AGREES TO:

1. Prepare and deliver the meals, inclusive of milk, to the following sites:

C.C Coppin Head Start  
C.C. Coppin Elementary School  
150 East 12<sup>th</sup> Street  
Lincoln, CA 95648

This will be done by 10:30 a.m. each day in accordance with the number of meals requested and the costs per each meal listed below:

Breakfast:	N/A	Lunch:	\$2.75
Supplemental Snack:	N/A	1% Milk:	Included, No extra cost



2. Provide **KidZKount**, for approval by **KidZKount's** Nutrition Services Unit, with a proposed menu for each month at least ten (10) days prior to the month to which the menu applies. Any changes to the menu made after **KidZKount's** approval must be agreed upon by **KidZKount** and documented on the menu records.
3. Assure that each meal provided to **KidZKount** under this contract meets the minimum requirements as to the nutritional content as specified by the Child and Adult Care Food Program Meal Pattern, Schedule B (attached) which is excerpted from the regulations 7 CFR Part 226.20. Schedule B requirements are component-based, but meals are prepared under the guidelines of the *allowable* nutrient-based system. **KidZKount** also acknowledges that **Vendor** may furnish meals that additionally meet component-based requirements; however, this is not a requirement under the nutrient-based system, supported by the nutritional analyses.
4. Maintain full and accurate records which document:
  - a. The menus listing all meals provided to **KidZKount** during the term of this contract.
  - b. A listing of all nutritional components of each meal, and
  - c. An itemization of the quantities of each component used to prepare said meal.

The **Vendor** also agrees to provide meal preparation documentation by using yield factors for each food item as listed in the USDA Food Buying Guide or the CNFDD Simplified Buying Guide when calculating and recording the quantity of food prepared for each meal.

5. Maintain such cost records as invoices, receipts, and/or other documentation that exhibit the purchase, or otherwise availability to the **Vendor**, of the meal components and quantities itemized in the meal preparation records.
6. Maintain on a daily basis an accurate count of the number of meal orders, as needed.
7. Allow **KidZKount** to increase or decrease the number of meal orders, as needed.
8. Present to **KidZKount** an invoice accompanied by reports no later than the tenth (10<sup>th</sup>) day of each month which itemizes the previous month's delivery. The **Vendor** agrees to forfeit payment for meals which are not ready within one hour of the agreed upon delivery time, or are spoiled or unwholesome at the time of delivery or do not otherwise meet the meal requirements contained in this Agreement.
9. Provide **KidZKount** with a copy of current health certifications for the food service facility in which it prepares meals for use in the CACFP. The vendor shall ensure that all health and sanitation requirements of the California Retail Food Facilities Law, Chapter 4 of the California Health and Safety Code are met at all times.
10. Operate in accordance with current CACFP regulations.

11. Retain all required records for a period of three years after the end of the fiscal year to which they pertain (or longer, if an audit is in progress); and upon request to make all accounts and records pertaining to the Agreement available to the Certified Public Accountant hired by **KidZKount**, representatives of the California State Department of Education, the US Department of Agriculture, and the US General Accounting Office for audit or administrative review at a reasonable time and place.
12. Not subcontract for the total meal, with or without milk, or for the assembly of the meal.

**KIDZKOUNT AGREES TO:**

1. Request by telephone, no later than 9:00 a.m. the day of, an accurate number of meals to be delivered to **KidZKount**.
2. Ensure that a **KidZKount** representative is available at each delivery site, at the specified time on each specified delivery day to receive, inspect, and sign for the requested number of meals. **KidZKount** assures the **Vendor** that this individual will be trained and knowledgeable in the record keeping and meal requirements of the CACFP, and in health and sanitation practices.
3. Provide personnel to serve meals, clean the serving and eating areas, and assemble transport carts and auxiliary items for pickup by the **Vendor** no later than 3:30 p.m. daily.
4. Notify the vendor within ten days of receipt of the next month's proposed menu of any changes, additions or deletions which will be required in the menu request.
5. Provide the **Vendor** with a copy of 7 CFR Part 226, the Child and Adult Care Food Program Meal Pattern, Schedule B; the USDA Food Buying Guide or the CNFDD Simplified Buying Guide (as applicable); and all other technical assistance materials pertaining to the food service requirements of the CACFP. **KidZKount** will within 24 hours of receipt from the State Agency, advise the **Vendor** of any changes in the food service requirements of CACFP.
6. Pay the **Vendor** by the 20<sup>th</sup> day of each month the full amount as presented on the monthly itemized invoice. **KidZKount** agrees to notify the **Vendor** within 48 hours of receipt of any discrepancy in the invoice.

**MISCELLANEOUS AGREEMENTS:**

**Vendor** will complete the required daily Transport Record indicating number of meals, menu item, and service size per person of item. In addition, for food safety purposes, **Vendor** will also indicate time the food was packed and the temperature of the food at packing time. Receiving **KidZKount** staff member will sign for food received. Staff member will also be responsible for taking the temperature of the food received, as applicable, for the duration of time before the food is served.

**Vendor** will furnish insulated transport containers that maximize temperature-holding capacity. In general, these containers will be picked up the following day as new lunches are delivered. If any food



trays are also furnished, **KidZKount** will wash them out and understands that the **Vendor** will take responsibility for sterilizing them before the next use.

**KidZKount** agrees to accept all responsibility for cleanliness, prevention of contamination, and hold of food products immediately upon receipt of such food products from the **Vendor**. **KidZKount** further agrees to ensure and hold harmless the **Vendor** from all liability claims resulting from actions occurring after receipt of food products from the **Vendor**.

**TERMS OF THE AGREEMENT:**

This agreement will take effect commencing the first day of August in the year signed below, and shall be for a period of one calendar year. It may be terminated by notification given by either party hereto to the other party at least 30 days prior to the date of termination. The agreement is contingent upon the agency being annually re-funded by the Department of Health and Human Services each February 1.

**IT WITNESS WHEREOF, THE PARTIES HERETO HAVE EXECUTED THIS AGREEMENT AS OF THE DATES INDICATED BELOW.**

\_\_\_\_\_  
Agency Official Signature

Denyse Cardoza  
Executive Director

1166 High Street  
Auburn, CA 95603  
(530) 886-4130

Date: \_\_\_\_\_

EIN: 94-164-7240



\_\_\_\_\_  
Vendor Official Signature

Jeff Dardis  
Food Service Director

810 J Street  
Lincoln, CA 95648  
(530) 645-6373

Date: 8/14/13

EIN: 94-159-9904

**AUDITED BY:**

\_\_\_\_\_  
Nancy Myers, Finance Director

Date: \_\_\_\_\_

4.5.4



**CACFP**  
**MEAL PATTERNS FOR CHILDREN AGE 1-5**

<b>FOOD COMPONENTS</b>	<b>Amount of serving</b>	
<b>BREAKFAST</b> <b>Select all three components</b>	<b>1-2 YEARS OLD</b>	<b>3-5 YEARS OLD</b>
• <b>Milk, fluid</b>	½ cup	¾ cup
• <b>Vegetable, fruit, or full-strength (100%) juice</b>	¼ cup	½ cup
• <b>Grain/bread (whole grain/enriched)</b> Or rolls, muffins Or cold dry cereal Or cooked cereal, pasta, grains	½ slice ½ serving ¼ cup or 1/3 oz ¼ cup	½ slice ½ serving 1/3 cup or ½ oz ¼ cup
<b>LUNCH</b> <b>Select all four components</b>		
• <b>Milk, fluid</b>	½ cup	¾ cup
• <b>Vegetable and/or fruit (two or more kinds)</b>	¼ cup total	½ cup total
• <b>Grain/bread (whole or enriched):</b> Or rolls, muffins Or cooked pasta, noodle products, grains	½ slice ½ serving ¼ cup	½ slice ½ serving ¼ cup
• <b>Meat/meat alternate</b> Lean meat, fish, or poultry Or cheese (natural or processed) Or cottage cheese Or egg (large) Or yogurt, plain or flavored, unsweetened Or cooked dried beans or dried peas* Or peanut butter, reduced-fat peanut butter Or other nut or seed butters Or peanuts, soynuts, tree nuts, roasted peas or seeds** Or an equivalent quantity of any combination of the above	1 oz 1 oz ¼ cup or 2 oz ½ egg ½ cup ¼ cup 2 Tbsp  ½ oz**	1-1/2 oz 1-1/2 oz 3/8 cup or 3 oz ¾ egg ¾ cup 3/8 cup 3 Tbsp  ¾ oz**
<b>AM or PM SUPPLEMENT</b> <b>Select two of these four components***</b>		
• <b>Milk, fluid</b>	½ cup	½ cup
• <b>Vegetable or fruit, or full strength (100%) juice</b>	½ cup	½ cup
• <b>Grain/bread (whole or enriched):</b> Or rolls, muffins Or cold dry cereal Or cooked cereal, pasta or grains	½ slice ½ serving ¼ cup or 1/3 oz ¼ cup	½ slice ½ serving 1/3 cup or ½ oz ¼ cup
• <b>Meat/meat alternate</b> Lean meat, fish, or poultry Or cheese Or cottage cheese Or egg (large) Or yogurt, plain or flavored, unsweetened**** Or cooked dried beans or peas* Or peanut butter, reduced fat peanut butter Or other nut or seed butters Or peanuts, soynuts, tree nuts, roasted peas, or seeds Or an equivalent quantity of any combination of the above	½ oz ½ oz 1/8 cup or 1 oz ½ egg ¼ cup 1/8 cup 1 Tbsp  ½ oz	½ oz ½ oz 1/8 cup or 1 oz ½ egg ¼ cup 1/8 cup 1 Tbsp  ½ oz

\*Dried beans or dried peas may be used as a meat alternate or vegetable component, but cannot be counted as both components in the same meal.

\*\* No more than 50% of the requirement shall be met with nuts or seeds. Nuts or seeds must be combined with another meat/meat alternate to fulfill the requirement. To determine combinations, 1 oz of nuts or seeds is equal to 1 oz of cooked lean meat, poultry or fish. Roasted peas can count as a meat alternate or vegetable component, but cannot be counted as both in the same meal.

\*\*\*Juice cannot be served when milk is served as the only other component.

\*\*\*\*If yogurt is used as the meat alternate component in supplements, milk cannot be used to satisfy the second component requirement. Commercially added fruit or nuts in flavored yogurt cannot be used to satisfy the second component requirement in supplements.

4.5.5

**INFORMATION**

**DISCUSSION**

**ACTION**

**ITEMS**

**WESTERN PLACER UNIFIED SCHOOL DISTRICT  
BOARD OF TRUSTEE MEETING FACT SHEET**

**MISSION STATEMENT:** Empower Students with the skills, knowledge, and attitudes for Success in an Ever Changing World.

**DISTRICT GLOBAL GOALS**

1. Develop and continually upgrade a well articulated K-12 academic program that challenges all students to achieve their highest potential, with a special emphasis on students
2. Foster a safe, caring environment where individual differences are valued and respected.
3. Provide facilities for all district programs and functions that are suitable in terms of function, space, cleanliness and attractiveness.
4. Promote the involvement of the community, parents, local government, business, service organizations, etc. as partners in the education of the students.
5. Promote student health and nutrition in order to enhance readiness for learning.

**SUBJECT:**

Approve Resolution No 13/14.3 Regarding  
Authorization to Teach Assigned Subjects

**AGENDA ITEM AREA:**

Discussion/ Action

**REQUESTED BY:**

Ryan Davis  
Assistant Superintendent of  
Personnel Services



**ENCLOSURES:**

Yes  
Resolution No. 13/14.3 &  
Consent form

**DEPARTMENT:**

Personnel

**FINANCIAL INPUT/SOURCE:**

N/A

**MEETING DATE:**

August 20, 2013

**ROLL CALL REQUIRED:**

Yes

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**BACKGROUND:**

Pursuant to Education Code 44256(b), and in order to ensure proper credentialing and teacher consistency for one of our assignments the District administration is making a recommendation that the Board approve Resolution No 13/14.3 which will allow one certificated teacher to teach Social Science for the entire 2013-2014 school year in a middle school departmentalized setting at grades 6-8 at Glen Edwards Middle School. The teacher has consented to this assignment.

**RECOMMENDATION:**

Administration recommends the Board of Trustees approve Resolution 13/14.3.

7.1



## Western Placer Unified School District Teacher Consent Form

**PURPOSE:** Pursuant with *Education Code section 44256(b)* Western Placer Unified School District obtained the teacher's consent prior to making assignment(s) outside of the teacher's current credential authorization.

District: Western Placer Unified School District School Year: 2013-2014

School Site: Glen Edwards Middle School Grade Level: 6-8

Teacher: Tim Kerrigan

Credential Held: Multiple Subject

1. Assignment: Social Science 6<sup>th</sup>-8<sup>th</sup> Legal Authorization per Ed Code §44256(b)

I mutually agree and consent to this assignment.

Teachers Signature: 

Printed/Typed Name: Tim Kerrigan

Date: 8/15/13

**WESTERN PLACER UNIFIED SCHOOL DISTRICT  
RESOLUTION NO. 13/14.3**

**AUTHORIZATION TO TEACH ASSIGNED SUBJECTS  
FOR THE 2013-2014 SCHOOL YEAR**

WHEREAS, the Western Placer Unified School District always seeks to hire fully credentialed teachers to teach all subjects. However, when credentialed teachers are not available, some teachers may be assigned to classes that are outside their credential authorizations but still in compliance with the law;

WHEREAS, Education Code section 44256(b) authorizes the holder of a multiple subject teaching credential or standard elementary credential to teach any subject in departmentalized classes to students below grade nine (9), provided he/she has completed at least twelve (12) semester units or six (6) upper division or graduate units, of coursework at an accredited institution in each subject to be taught. The teacher's consent to the assignment is required;

WHEREAS, the District finds that Tim Kerrigan has satisfied the unit requirement of Education Code section 44256(b) in order to teach social science at Glen Edwards Middle School during the 2013-2014 school year; and

WHEREAS, Tim Kerrigan has consented to teaching social science at Glen Edwards Middle School during the 2013-2014 school year.

NOW, THEREFORE, BE IT RESOLVED that the Governing Board of the Western Placer Unified School District authorizes Tim Kerrigan to teach social science at Glen Edwards Middle School for the 2013-2014 school year.

PASSED AND ADOPTED this \_\_\_\_ day of August, 2013 by the Board of Trustees of the Western Placer Unified School District by the following vote:

AYES:            NOES:            ABSENT:            ABSTAIN:

\_\_\_\_\_  
President  
Board of Trustees  
Western Placer Unified School District

Attested:  
I certify that the foregoing resolution was adopted by the Board of Trustees of the Western Placer Unified School District, County of Placer, on the date shown above.

\_\_\_\_\_  
Clerk  
Board of Trustees  
Western Placer Unified School District

7.1.2

**WESTERN PLACER UNIFIED SCHOOL DISTRICT  
BOARD OF TRUSTEE MEETING FACT SHEET**

**MISSION STATEMENT:** Empower Students with the skills, knowledge, and attitudes for Success in an Ever Changing World.

**DISTRICT GLOBAL GOALS**

1. Develop and continually upgrade a well articulated K-12 academic program that challenges all students to achieve their highest potential, with a special emphasis on students
2. Foster a safe, caring environment where individual differences are valued and respected.
3. Provide facilities for all district programs and functions that are suitable in terms of function, space, cleanliness and attractiveness.
4. Promote the involvement of the community, parents, local government, business, service organizations, etc. as partners in the education of the students.
5. Promote student health and nutrition in order to enhance readiness for learning.

**SUBJECT:**

Common Core State Standards – Overview,  
History, Myths & Progress Check

**AGENDA ITEM AREA:**

Information

**REQUESTED BY:**

Mary Boyle  
Deputy Superintendent Educational Services

**ENCLOSURES:**

Yes

**DEPARTMENT:**

Educational Services

**FINANCIAL INPUT/SOURCE:**

General Fund

**MEETING DATE:**

August 20, 2013

**ROLL CALL REQUIRED:**

No

**BACKGROUND:**

Common Core State Standards reflect an enormous shift in instructional strategies and learning expectations on the parts of school districts and students. The Common Core were adopted by the State of California on August 2, 2010, and have now been adopted by nearly all of the 50 United States. The Common Core State Standards attempt to align the learning standards for students in grades K – 12 across the nation on a par with international standards. The Common Core State Standards are a major revision for California from the previously adopted 1997 California State Standards, being more rigorous, more clearly organized, sequentially organizing skills for easier reference K/12, and focusing on higher levels of thinking on the part of students.

New national assessments are being developed that will in part replace our current STAR testing in the areas of Mathematics and English/Language Arts. California had the option of choosing one of the two developing assessments, choosing Smarter Balanced Assessment Consortium (SBAC). SBAC will “go live” in the 2014/15 school year, with the option of a trial run in the 2013/14 school year. SBAC is aligned with the new Common Core State Standards.


WPUSD has been providing professional development to our administrators and instructional staff over the last year. A series of Common Core State Standards presentations will be made during the 2013/14 school year to inform our Board of Trustees and general public regarding the impact and importance of these new standards.

**RECOMMENDATION:**

Information only.


7.2



 <b>COMMON CORE</b> <b>Instructional Practices</b> Move instruction toward requiring students' use of higher order thinking skills (HOTS) to prepare them for college/career	Phase I (2011/12 ~ 2012/13)		Phase II (2013 ~ 2014)		Phase III (2014 ~ 2015)	
	In the Classroom (What teachers do; what students see)	Behind the Scenes (What teachers and/or admin do)	In the Classroom (What teachers do; what students see)	Behind the Scenes (What teachers and/or admin do)	In the Classroom (What teachers do; what students see)	Behind the Scenes (What teachers and/or admin do)
<b>Curricula</b> Infuse literacy & writing in all content areas to prepare students for college/career	Focus on CCSS, Depth of Knowledge (DOK), Rigor/Relevance (RR) in ELA/Math (Soc/Sci)	Attend county <b>Professional Development (PD)</b> ; facilitate district & site PD; <b>PLC Planning/Reflection; Peer Coaching</b>	Refine and strengthen implementation and focus on instructional practices (DOK, RR in ALL depts)	District and site <b>PD</b> at grade levels/depts on Rigor/Relevance & <b>DOK; PLC Planning/Reflection; Peer Coaching</b>	Continue to refine and strengthen implementation and focus practices toward DOK & RR	Continue district & site PD on Rigor/Relevance & DOK; PLC Planning/Reflection; Peer Coaching
	Continue current curricula; special attention to new CCSS; emphasis on deep thinking, understanding, writing/application	<b>Identify topics in existing curricula needing additional attention to fully implement CCSS;</b> study current graduation/C/TE requirements	Enhance and extend to topics/subtopics present in CCSS	<b>Align, revise and pace grade level curricula for use in 2014 - 2015; phase in any graduation/CTE requirement changes</b>	<b>Fully implement new curriculum</b>	Facilitate reflection and revise/adjust as needed
<b>Resources, Materials, Textbooks</b> Identify, secure and implement materials to address college/career readiness	Use existing resources, materials, noting any gaps between them and CCSS	Evaluate current materials for gaps; review "Bridge" materials as they become available; <b>revise lessons &amp; assignments</b>	Use existing resources in ELA, Soc, Sci with supplement materials to address CCSS; <b>Math adoption</b>	Facilitate ongoing reflection on "hybrid" & other materials to fill gaps/ continue implementation of CCSS	<b>Fully implement materials, supports, assignments to complete CCSS; New Math textbooks</b>	Facilitate reflection; monitor timeline for new adoptions <b>(New ELA/Soc/Sci textbook adoptions @ 2016!)</b>
<b>Assessments</b> Utilize assessments to inform instruction toward student college/career readiness	Use current formative and summative site and district assessments	Investigate/ <b>Pilot</b> new Smarter Balanced sample assessments as available	Supplement existing formative site assessments with items aligned to CCSS	Facilitate continued <b>PD on CCSS sample</b> assessm't items; <b>review SBAC formative assessments</b>	<b>Utilize fully aligned CCSS formative &amp; summative assessments</b>	Prepare schedules for online SBAC assessment

7.2.1



 <b>COMMON CORE</b>	Phase I (2011/12 ~ 2012/13)		Phase II (2013 ~ 2014)		Phase III (2014 ~ 2015)	
	In the Classroom (What teachers do; what students see)	Behind the Scenes (What teachers and/or admin do)	In the Classroom (What teachers do; what students see)	Behind the Scenes (What teachers and/or admin do)	In the Classroom (What teachers do; what students see)	Behind the Scenes (What teachers and/or admin do)
<b>Accountability</b> Meet State and Federal accountability requirements	Focus on AYP indicators - % PRO/ADV; API; Grad Rate; STAR Testing	Attend to AYP/API/ PI requirements	Focus on AYP indicators - % PRO/ADV; API; Grad Rate; STAR Testing & Pilot SBAC	Attend to AYP/API/ PI requirements; <b>Prepare for new SBAC measures</b>	<b>New SBAC Assessment;</b> Possible continued STAR requirements (Sci/Soc)	Focus on State & SBAC indicators & requirements
<b>Technology/Reporting Systems</b> Utilize technology to meet assessment and accountability requirements	Maintain use of OARS, AERIES, tech equipment	Consider use of "Quick Checks" in OARS itembank for CCSS local assessments; consider future use of Datawise; <b>analyze tech infrastructure</b>	Maintain use of OARS/Datawise, AERIES, tech equipment	<b>Use OARS to realign common assessments using CCSS Item Bank; develop aligned K, 1/3 &amp; 4/5 report cards;</b> prepare to pilot (SBAC)	Maintain use of OARS/Datawise as appropriate; Utilize new K, 1/3, 4/5 report cards; Utilize aligned OARS assessments	Utilize identified technology for online assessments; review technology grade level outcomes; revise District Tech Plan

**GLOSSARY TO NEW TERMINOLOGY:**

**CCSS** - Common Core State Standards - The standards adopted for 48 states in 2010 - internationally benchmarked - **include DOK** (below)

**CCCSS** - CA Common Core State Standards - Not to be outdone, CA's adoption of CCSS + 10% extra!

**HOTS** - Higher Order Thinking Skills "Old" term - Bloom's Taxonomy, focusing on top 3 knowledge levels- analysis, synthesis, evaluation

**DOK** - Depth of Knowledge - 4 learning levels: 1-Recall/Reproduction; 2-Applying Skills/Concepts; 3-Strategic Thinking; 4-Extended Thinking

**R & R** - Rigor/Relevance - Framework w/ 4 quadrants plotting knowledge/application: A-Acquisition; B-Application; C-Assimilation; D-Adaptation

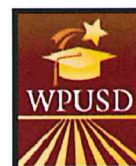
**SBAC** - Smarter Balanced Assessment Consortium (SBAC) - One of two national assessments (adopted by CA) to meet CCSS requirements

**PARCC** - Partnership for Assessment of Readiness for College and Careers - the other national assessment - see SBAC

**REFERENCES:**

**DOK** - Norman Webb, University of Wisconsin; **Rigor & Relevance** - International Center for Leadership in Education (Daggett)

7.2.2



Western Placer Unified School District

## Common Core State Standards ~

### Overview, History/Myths, & Progress Check

Mary Boyle, Deputy Supt Educational Services

August 20, 2013

## Common Core State Standards – Overview & Progress Check

- 2011/12 ~ Admin Prof Development (PD)
- 2012/13 ~ Intensive Teacher/Admin PD ~ K/5 ELA/Literacy, 6/12 Literacy & Math; Peer Coach Positions; Mapping of Current Standards Against CCSS; Technology Evaluation; SBAC Trials
- 2013/14 ~ Intensive Teacher/Admin PD; Board and Parent Outreach/Communication; Assessment & Report Card Revisions; Math Textbook Review; Current ELA/Literacy Curriculum; SBAC ELA/Math Trial Testing; Implementation Preparation
- 2014/15 ~ Implementation of CCSS K/12 for ELA/Literacy & Math; New Assessments; New Math Textbooks; New K/5 Report Cards; SBAC begins!



## Common Core State Standards – 2013/14 Board/Community Outreach

- ❑ Series of CCSS Informational Board Presentations
  - August – CCSS Overview, History/Myths & Progress Check
  - September – CCSS Literacy ~ Is it Just for English/Language Arts?
  - October – CCSS Mathematics ~ What's the Difference?
  - November ~ SPSA's (Single Plans for Student Achievement) & LCAP (Local Control Accountability Plan)
  - January ~ SBAC (Smarter Balanced Assessment Consortium) Assessment & Preparation
  - March ~ Accountability ~ What About NCLB, AYP, API, & PI??
  - May ~ Report on Progress/Next Steps
- ❑ CCSS Information at Site Levels
  - Back to School Night & Open House Information
  - Parent Information Brochures
- ❑ Website Information

## Common Core State Standards Pre/Post-test

**Name & explain:**

1. CCSS
2. CCCSS
3. SBAC
4. HOTS
5. R & R
6. DOK
7. SMP
8. HOM
9. PLC
10. MTSS



**BONUS QUESTION:**

★ Name & Explain RtI



## How Does Common Core Fit with WPUUSD's Priorities?

### ***DISTRICT MISSION:***

- *Empower students with the skills, knowledge and attitudes for success in an ever-changing world.*



### Our mission is focused through 5 Strategic Goals....

- GOAL 1: **Student Achievement**
- GOAL 2: Safe Caring Environment
- GOAL 3: Learning Environment/Facilities
- GOAL 4: Community Involvement
- GOAL 5: Student Health/Nutrition



## Goal 1: **Student Achievement**

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- All students will achieve their highest potential.



## Related Recent & Ongoing District Efforts Toward Student Achievement:

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- Professional Learning Communities (PLC's)
- Best First Instruction/Student Engagement
- Multi-Tiered Systems of Support (MTSS)
  - Differentiated Instruction
  - Tier III Academic Vocabulary
  - Behavioral (PBIS) and Academic (RtI) Supports
  - Enrichments (GATE/HA, Honors, AP)
- **Common Core State Standards (CCSS) Transition**



## What are the Common Core State Standards?

- A shared set of clear educational standards.
  - *Common Standards are intended to ensure students are receiving a high-quality education consistently from school to school and state to state.*
- CCSS are designed to be robust and relevant to the real world, reflecting the knowledge and skills that our young people need for success in college and careers.
- CCCSS ~ CA's additional standards; since minimized

## What Prompted the Common Core State Standards?

- Need for comparability of student achievement state to state (federal funding purposes; student/family mobility).
- Assurance of college-ready high school graduates (students not needing remedial college classes)
- Need for career-ready high school graduates (business ~ focus on academics not always applicable to non-academia environments)
- Needed shift from NCLB emphasis of "skills" to "critical thinking/problem solving"

## Who Wrote the Common Core?

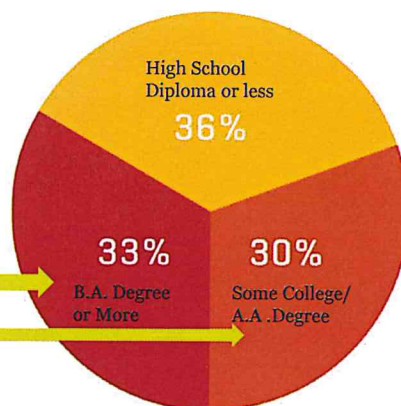
- ❑ Coalition of Chief State School Officers (CCSSO) & National Governors' Assn (NGA) ~ 2008/09 drafts
  - Influence of Coalitions of Business, Policy Makers & Education (including USDOE & NEA)?
    - ❑ Hunt Institute ~ Affiliated Center of UofNC ,Chapel Hill ~ “strategic catalyst for transforming public education & securing our country’s future” ~ 2001
    - ❑ P21~ Partnership for 21<sup>st</sup> Century Skills – emphasis on 3R’s/4C’s critical thinking, communication, collaboration, creativity ~ 2002
- ❑ Involvement of higher education reps ~ 2009
- ❑ K/12 teacher input ~ 2009/10 (10,000 submissions)
- ❑ Adopted by CA ~ 2010
- ❑ Adopted by 46 of 50 states by 2013
  - Texas, Alaska, Virginia, Nebraska – “holdouts”
  - Michigan and Indiana – “pausing” – studying \$\$

## Common Core Intended to Fill the “Preparation Gap”

- ❑ Post-secondary education has become necessary to compete in the global economy.

- ❑ In 2018, **63%** of all U.S. jobs will require at least some college.

- ❑ Source: Center on Education and the Workforce, Georgetown University



Source: March CPS data, various years; Center on Education and the Workforce forecast of educational demand to 2018

## CCSS Correlated to 21<sup>st</sup> Century Competencies

### The Four C's - Partnership for 21<sup>st</sup> Century Skills – P21Coalition

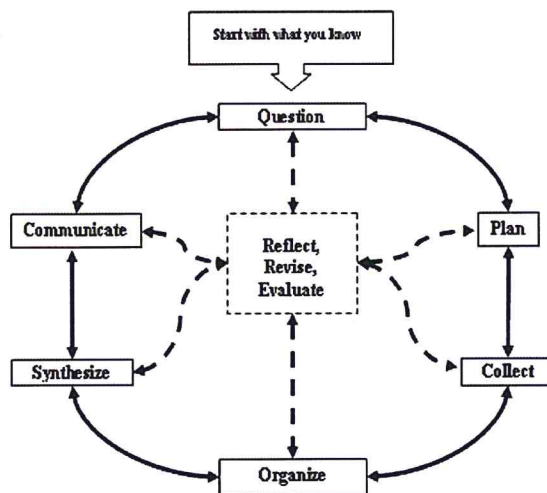
- **Critical thinking and problem solving**—including the ability to make decisions, solve problems, and take action as appropriate;
- **Communication skills**—the ability to synthesize and transmit ideas in written (incl tech) and oral formats;
- **Collaboration and team building**—the ability to work effectively with others, including those from diverse groups & with opposing viewpoints;
- **Creativity and innovation**—the ability to see what's NOT there and make something happen.
- (Character –“5th C” – grit, work ethic, perseverance not specifically included in CCSS)

We must move learning from this....





To this...



## Strengths of the New Common Core

- Focus on **Literacy and Mathematics across all content areas**
- Aligned with expectations for **College and Career Readiness**
- Developed to provide **consistency** from state to state
- Include content understanding requiring **deep thinking and complex solutions** on the parts of **students** in response to **complex questioning** on the parts of **teachers**
- For California: more of a shift in **how we teach** and **what** we expect students to do ~ students develop **Habits of Mind (HOM)** as they approach problems/questions

### CCSS *Habits of Mind (HOM)* ~ *ELA//Literacy Capacities*

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- ❑ Demonstrate independence
- ❑ Build strong content knowledge
- ❑ Respond to varying demands of audience, task, purpose, and discipline
- ❑ Comprehend as well as critique
- ❑ Value evidence
- ❑ Use technology and digital media strategically
- ❑ Understand other cultures and perspectives

### CCSS *Habits of Mind (HOM)* ~ *MATH* *Standards for Mathematical Practice (SMP)*

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1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning of others.
4. Model with mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

## Common Core State Standards – So what does this look like in the classroom?

- ❑ Deeper questioning techniques - **teachers**
- ❑ More complex assignments/projects with real-life applications - **teachers**
- ❑ More use of textbooks & challenge of student answers - **teachers**
- ❑ Defense of answers showing greater understanding of concepts & detailed evidence from text - **students**
- ❑ More research-based & project-based learning – **students**
- ❑ More use of technology – **students**

## CCSS Habits of Mind ~

### All content area teachers:

- ❑ Design deeper learning environments where students develop **Habits of Mind**
  - Lead high-level, text-based discussions
  - Focus on the process, not just content
  - Create assignments for real audiences and with real purposes
  - Teach argument (logic/reasoning), not just persuasion (emotion)
  - Increase text complexity~use challenging text!



## CCSS Habits of Mind

### All content area teachers:

- Intentionally sequence instructional strategies to progressively engage students in **Habits:**
  - Think, Pair-Share (or Think, Write, Pair-Share)
  - Show/model “thinking” in classrooms
  - Practice questioning and wait time
  - Group students and use engaging problems
  - Use deep questions and prompts with student groups
  - Allow struggle time; require evidential responses
  - Encourage/model logical reasoning

## *The Myths of Common Core....*

### What the CCSS “are not” .....

- A national/business dictation of curriculum content
  - CCSS define skills (literacy) **not content** in ELA, Social Studies, Science, & Technical Subjects
  - 40 of 500 possible Race to Top Points – “CCSS”
  - P21 / Other Corporate influence
- A “dumbing down” of current CA standards
  - CCSS require higher reading levels than current CA standards; use of higher lexicon textbooks and ancillary materials
  - CCSS require extending thinking; creating viable arguments; citing text/proof to support arguments
  - Algebra CAN be taught before Grade 9 IF student is ready; if not, Grade 8 Math curriculum exists

## *The Myths of Common Core ....*

### What the CCSS “are not” .....

- ❑ A definitive change in content in English Language Arts classes deemphasizing the classics
  - CCSS suggests 70% use of non-fiction reading in grades 7 – 12; however, this is NOT limited to ELA classes – includes Science, Social Studies & Technical Subjects
  - Classical literature will continue to be taught in ELA!
  - Cursive writing can be taught (WPUSD currently teaches cursive in Grade 3)
- ❑ A new vehicle to track sensitive family demographics
  - This already exists re poverty, ethnicity, parent ed, etc. as required for federal and state accountability; monitoring subgroup progress
  - There is NO additional iris scanning, tracking of religion, fingerprints, DNA, blood type etc. in CCSS!

## CCSS ~ What about the assessments?

- ❑ SMARTER Balanced Assessment Consortium (SBAC) – replaces STAR CST/CMA ELA & Math ONLY ~ Grades 3 – 8 & 11
- ❑ Begins in 2014-2015 school year.
  - *Smarter Balanced assessments will go beyond multiple-choice questions and include short constructed response, extended constructed response, and performance tasks that will allow students to complete in-depth work that demonstrates analytical skills and real-world problem solving.*
- ❑ STAR CST Science & Social Studies? CAPA? CAHSEE? CELDT? PFT?
- ❑ Assessments for Grades 2, 9, 10??

## Common Core State Standards

Status	SMART Goal Focus
<ul style="list-style-type: none"> <li>❑ Overall awareness of CCSS</li> <li>❑ Professional development designed to bridge from NCLB to CCSS               <ul style="list-style-type: none"> <li>■ Math CCSS mapping/text reviews</li> <li>■ ELA - CCSS mapping /use of current curriculum</li> <li>■ <b>HOTS</b> (Higher Order Thinking Skills), <b>DOK</b> (Depth of Knowledge)</li> <li>■ Depth &amp; complexity; iconic teaching</li> <li>■ Soc/Science/Technical Subjects applications of literacy skills</li> </ul> </li> <li>❑ Technology Preparation</li> </ul>	<ul style="list-style-type: none"> <li>❑ Analysis of overlap between current California Standards and CCSS in core content areas</li> <li>❑ Develop curriculum mapping of essential standards; plan timeline for implementation throughout 2013-14</li> <li>❑ Continue to align best practices with CCSS <b>HOTS/DOK</b>:               <ul style="list-style-type: none"> <li>■ Student engagement</li> <li>■ Critical thinking/HOTS/Iconic Teaching</li> <li>■ DOK/R&amp;R (<b>Rigor/Relevance</b>)</li> <li>■ Literacy across the curriculum</li> <li>■ Assignment/Project/Assessment design</li> </ul> </li> <li>❑ Align professional development to CCSS – Intensive PD/Peer Coaching</li> </ul>

## Common Core State Standards Pre/Post-test

Name & explain:

1. CCSS
2. CCCSS
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4. HOTS
5. R & R
6. DOK
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**BONUS QUESTION:**

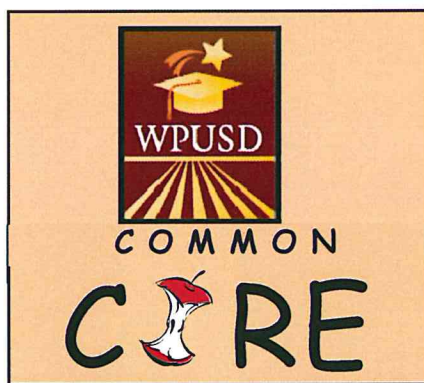
★ Name & Explain RtI





## *Peeling the Common Core Apple!*

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See WPUSD Handout - Aug 10, 2012; Revised March 1, 2013  
**NEXT Board Presentation ~ Focus on Literacy!**

**WESTERN PLACER UNIFIED SCHOOL DISTRICT  
BOARD OF TRUSTEE MEETING FACT SHEET**

**MISSION STATEMENT:** Empower Students with the skills, knowledge, and attitudes for Success in an Ever Changing World.

**DISTRICT GLOBAL GOALS**

1. Develop and continually upgrade a well articulated K-12 academic program that challenges all students to achieve their highest potential, with a special emphasis on students
2. Foster a safe, caring environment where individual differences are valued and respected.
3. Provide facilities for all district programs and functions that are suitable in terms of function, space, cleanliness and attractiveness.
4. Promote the involvement of the community, parents, local government, business, service organizations, etc. as partners in the education of the students.
5. Promote student health and nutrition in order to enhance readiness for learning.

**SUBJECT:**

Common Core State Standards One-Time Funding  
Preliminary Action Plan

**AGENDA ITEM AREA:**

Action

**REQUESTED BY:**

Mary Boyle  
Deputy Superintendent Educational Services

**ENCLOSURES:**

Yes

**DEPARTMENT:**

Educational Services

**FINANCIAL INPUT/SOURCE:**

One-Time CCSS Funding

**MEETING DATE:**

August 20, 2013

**ROLL CALL REQUIRED:**

No

**BACKGROUND:**

AB 86 Education Omnibus Trailer Bill appropriates \$1.25 billion statewide to support the integration of academic content standards in instruction, apportioning these funds to school districts, county offices of education, charter schools and state special schools on an equal rate per pupil basis, based on prior year enrollment. The bill requires the receiving entities to adopt a plan delineating how the funds shall be spent and to report detailed expenditure information to the State Department of Education on or before July 1, 2015. Funds are of a one-time nature, are approximately \$200/student, and must be spent during the 2013 – 2014 and/or 2014 – 2015 school year. Funding apportioned pursuant to this section is specifically intended to fund the costs of any new programs or higher levels of services associated with implementation of the Common Core State Standards. Expenditures must fall within one or more of the following areas: technology enhancement, instructional materials, or professional development.

The Preliminary Allocation Plan was presented at the August 6, 2013 Board of Trustees meeting for discussion. Based on the discussion, adjustments were made and it is now presented for action.

**RECOMMENDATION:**

Approve Common Core State Standards One-Time Funding Preliminary Allocation Plan 2013 – 2015.

Common Core State Standards (CCSS) One-Time Funding  
Preliminary Allocation Plan  
2013 - 2015

	CCSS Allocation		
	Per Student	# Stu	Total
<b>REVENUES</b>	\$200	6450	\$1,290,000
<b>EXPENDITURES</b>			
1 Technology Enhancement: Smarter Balanced Assessment Consortium (SBAC) Hardware	\$25	6450	\$161,250
2 Technology Enhancement: Infrastructure	\$25	6450	\$161,250
3 Professional Development	\$17	6450	\$109,650
4 Instructional Materials - CCSS Based	\$33	6450	\$212,850
5 Other	\$100	6450	\$645,000
<b>TOTAL</b>			<b>\$1,290,000</b>

<b>EXPLANATION OF POSSIBLE EXPENDITURES</b>	Cost/Item	# Items	Total
1 Purchase of PC's for Computer Lab Testing	\$800	201	\$160,800
<b>OR</b>			
1 Purchase of Tablets for Testing	\$300	537	\$161,100
2 Infrastructure - wiring; cabling; fiber			\$161,250
3 Cost of PD for Teachers (12 hours/teacher at \$36/hour)	\$432	254	\$109,728
4 Purchase of CCSS-Aligned Textbooks	\$65	3275	\$212,875
To Be Determined as District Plan is Developed - Must Meet			
5 CCSS Funding Guidelines and Requirements			\$645,000
<b>TOTAL</b>			<b>\$1,289,953</b>

7.3.1



## AB 86: EDUCATION OMNIBUS TRAILER BILL

This bill would appropriate \$1,250,000,000 from the General Fund to the Superintendent of Public Instruction for transfer to Section A of the State School Fund to support the integration of academic content standards in instruction, as specified. The bill would require the Superintendent to apportion these funds to school districts, county offices of education, charter schools, and the state special schools using an equal rate per pupil based on prior year enrollment. The bill would require the school districts, county offices of education, charter schools, or state special schools receiving these funds to use them for certain purposes, including professional development of teachers, administrators, and paraprofessional educators or other classified employees involved in the direct instruction of pupils, as specified. The bill would require, as a condition of receiving funds apportioned pursuant to the bill, a school district, county office of education, charter school, or state special school to adopt a plan delineating how the funds shall be spent and to report detailed expenditure information to the State Department of Education on or before July 1, 2015, as specified. The bill would require the department to provide a summary of the expenditure information provided to it to the appropriate budget subcommittees and policy committees of the Legislature and to the Department of Finance on or before January 1, 2016. (AB 86 p.9)

SEC. 85.(a)(1)The sum of one billion two hundred fifty million dollars(\$1,250,000,000) is hereby appropriated from the General Fund to the Superintendent of Public Instruction for transfer to Section A of the State School Fund. The sum of six hundred twenty-five million dollars (\$625,000,000) shall be transferred in July 2013 and the sum of six hundred twenty-five million dollars (\$625,000,000) shall be transferred in August 2013.

(2) It is the intent of the Legislature that school districts, county offices of education, charter schools, and the state special schools use funds allocated pursuant to subdivision (b) to support the integration of academic content standards in instruction adopted pursuant to Sections 60605.8, 60605.85, 60605.10, 60605.11, and 60811.3 of the Education Code, for kindergarten and grades 1 to 12, inclusive, for purposes of establishing high-quality instructional programs for all pupils.

(b) The Superintendent of Public Instruction shall apportion funds to school districts, county offices of education, charter schools, and the state special schools using an equal rate per pupil based on prior year enrollment.

(c) A school district, county office of education, charter school, or state special school may encumber funds apportioned pursuant to this section at any time during the 2013–14 or 2014–15 fiscal year.

(d) A school district, county office of education, charter school, or state special school shall expend funds allocated pursuant to this section for any of the following purposes:

(1) Professional development for teachers, administrators, and paraprofessional educators or other classified employees involved in the direct instruction of pupils that is aligned to the academic content standards adopted pursuant to Sections 60605.8, 60605.11, 60605.85, and 60811.3 of the Education Code.

(2) Instructional materials aligned to the academic content standards adopted pursuant to Sections 60605.8, 60605.85, 60605.11, and 60811.3 of the Education Code, including, but not limited to, supplemental instructional materials as provided in Sections 60605.86, 60605.87, and 60605.88 of the Education Code.

(3) Integration of these academic content standards through technology-based instruction for purposes of improving the academic performance of pupils, including, but not necessarily limited to, expenditures necessary to support the administration of computer-based assessments and provide high-speed, high-bandwidth Internet connectivity for the purpose of administration of computer-based assessments.

(e) As a condition of receiving funds allocated pursuant to this section, a school district, county office of education, charter school, or state special school shall do both of the following:

7.3.2



(1) Develop and adopt a plan delineating how funds allocated pursuant to this section shall be spent. The plan shall be explained in a public meeting of the governing board of the school district, county board of education, or governing body of the charter school, before its adoption in a subsequent public meeting.

(2) On or before July 1, 2015, report detailed expenditure information to the State Department of Education, including, but not limited to, specific purchases made and the number of teachers, administrators, or paraprofessional educators that received professional development. The State Department of Education shall determine the format for this report.

(f) The State Department of Education shall summarize the information reported pursuant to paragraph (2) of subdivision (e) and shall submit the summary to the appropriate budget subcommittees and policy committees of the Legislature and to the Department of Finance on or before January 1, 2016.

(g) Funding apportioned pursuant to this section is specifically intended to fund, and shall first be used to offset, the costs of any new programs or higher levels of service associated with implementation of the academic content standards adopted by the State Board of Education pursuant to Sections 60605.8, 60605.85, 60605.10, 60605.11, and 60811.3 of the Education Code, including those required by this section or Article 3.8(commencing with Section 52060) of Chapter 6.1 of Part 28 of Division 4 of Title 2 of the Education Code.

(h) Funding apportioned pursuant to this section is subject to the annual audits required by Section 41020 of the Education Code.

(i) For purposes of making the computations required by Section 8 of Article XVI of the California Constitution, of the funds appropriated by this section:

(1) One billion dollars (\$1,000,000,000) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision(c) of Section 41202 of the Education Code, for the 2012–13 fiscal year, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202 of the Education Code, for the 2012–13 fiscal year.

(2) Two hundred fifty million dollars (\$250,000,000) shall be deemed to be "General Fund revenues appropriated for school districts," as defined in subdivision (c) of Section 41202 of the Education Code, for the 2013–14 fiscal year, and included within the "total allocations to school districts and community college districts from General Fund proceeds of taxes appropriated pursuant to Article XIII B," as defined in subdivision (e) of Section 41202 of the Education Code, for the 2013–14 fiscal year.