

Lowell Joint School District
Rancho Starbuck Intermediate School
16430 Woodbrier Drive, Whittier, CA 90604

REGULAR MEETING OF THE BOARD OF TRUSTEES
August 4, 2025 – 6:30 p.m.

AGENDA

Lowell Joint School District Character Education and Patriotic Education Focus of the Month:

- Character Trait: Respect - The process and outcome of successfully adapting to difficult or challenging life situations; toughness and flexibility.
- Patriotic Focus: Pledge of Allegiance & National Anthem
- Honoring Character & Patriotism in Action: Honoring the Armed Forces & Declaration of Independence

Rancho Starbuck Groundbreaking – Measure P

6:00 p.m.

I. Call to Order

6:30 p.m.

A. Comments from the Public

INFORMATION

1. Board Agenda Items: Any member of the audience may speak to any agenda item by submitting a “Presentation Card” (supply located on the table near double exit doors). Please hand the completed card to the secretary. When the item is considered by the Board, individuals submitting presentation cards will be called upon prior to Board action. Speakers must limit their comments to three (3) minutes. The Board shall limit the total time for public input on each item to 30 minutes. With Board consent, the president may increase or decrease the time allowed for public presentation, depending on the topic and the number of persons wishing to be heard.
2. Topics Not on Agenda: Anyone in attendance may address any issue by following the same identification process as shown in I-A-1 above. Since the Board cannot take action on items which are not on the agenda, such items will be referred to the Superintendent for handling. Individuals interested in speaking to items which are not on the agenda will be called upon under Item IV.

B. Closed Session

6:30 p.m.

1. Pupil Personnel Matters/Advice from Legal Counsel – Existing and Anticipated Litigation (Disclosure of Case Name Would Jeopardize Potential Settlement Negotiations)/Real Property/Liability Claims/Negotiations/ Public Employee Appointments – Discipline – Dismissal – Release (Government Code Section 54957)/ Employer/Employee Relations
2. Public Employee Negotiations – Certificated School Employees Association

(LJEA)/ Classified School Employees Association (CSEA); Agency
Negotiator: Mr. Coombs

3. Superintendent's Evaluation (Pursuant to Government Code Section 54957)

C. Regular Session

Approximately
7:30 p.m.

II. Preliminary Procedural – Board President

- A. Salute to the Flag
- B. Reporting Out Action (if any) Taken in Closed Session
- C. Introductions and Welcome of Guests
- D. Comments from the Public

INFORMATION

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2. Topics Not on Agenda: Anyone in attendance may address any issue by following the same identification process as shown in II-D-1 above. Since the Board cannot take action on items which are not on the agenda, such items will be referred to the Superintendent for handling. Individuals interested in speaking to items which are not on the agenda will be called upon under Item IV.

- E. Acknowledgement of Correspondence to the Board

INFORMATION

- F. Approval of Agenda

ACTION

- G. Approval of Minutes from the June 23, 2025, Regular Board Meeting

ACTION

III. Reports

INFORMATION

- A. Timely Information from Board and Superintendent – Board President

IV. Topics Not on the Agenda

V. General – Jim Coombs

A.	Resolution 2025/26 No. 979 Making Findings Under the Government Code 4217.12, in for Furtherance of Utilization of CalShape Funds for Improvements of Ventilation Systems District Wide	PUBLIC HEARING ACTION/ (RESOLUTION)
B.	Resolution 2025/26 No. 980 Approving Agreement for the SVPP (School Violence Prevention Program) - COPS (Office of Community Oriented Policing Services) Funding Opportunity	ACTION/ (RESOLUTION)

VI. Business Services – David Bennett

A.	Bond Sale Resolution 2025-2026 No. 981 Resolution of the Board Of Trustees of the Lowell Joint School District Authorizing the Issuance and Sale of Not To Exceed \$35,000,000 Aggregate Principal Amount of Bonds of the District, By Public Sale, Approving The Form Of A Continuing Disclosure Certificate, An Official Statement And An Official Notice Of Sale For the Bonds, And Authorizing Related Action	ACTION/ (RESOLUTION)
B.	Resolution 2025-26 No. 982 of the Board of Trustees of the Lowell Joint School District Resolution Requesting The Board of Supervisors of the County of Orange to Establish Tax Rate for Bonds of the Lowell Joint School District Expected to be Sold During Fiscal Year 2025-26, and Authorizing Necessary Actions in Connection Therewith	ACTION/ (RESOLUTION)
C.	2025-26 45 Day Budget Update	INFORMATION
D.	Approval of Piggyback Contract with CN School & Office Solutions, Inc. for Classroom Furniture (San Bernardino County Superintendent of Schools Bid #23/24-0005)	ACTION
E.	Approval of Architectural Services Agreement with Ghataode Bannon Architects (GBA) to Increase Reimbursable Expenses for the District's Rancho Starbuck Intermediate School Measure "P" Project	ACTION
F.	Resolution No. 2025/26 No. 983 Approving the Guaranteed Maximum Price of \$25,827,311.00 for the Lease-Leaseback Contract with Erickson Hall Construction Company, Inc., for the New Modular Buildings and Gymnasium/Performing Arts Center Project at Rancho Starbuck Intermediate School	ACTION/ (RESOLUTION)

VII. Human Resources – Jim Coombs

A.	Approval of a Variable Term Waiver for Melissa Lozano Assigned to be a Speech Language Pathologist Teacher for Lowell Joint School District for the	ACITON

2025/2026 School Year

VIII. Educational Services – Rhonda Overby

No Items Except on Consent

IX. Administrative Services – Carl Erickson

A.	Approval to Utilize San Gabriel Valley Food Services Cooperative Purchasing Group School Districts/Agency Bids for Food and Supplies for the 2025/26 School Year	ACTION

X. Consent Calendar

Action by the Board in adoption of the “Consent Calendar” means that all items appearing in this section are adopted by one single motion, unless a Member of the Board or the Superintendent requests that any such item be removed from the “Consent Calendar” and voted upon separately. Generally, “Consent Calendar” items are enacted upon in one action to conserve time and permit focus on other-than-routine matters

A. General – Jim Coombs

1.	Approval of Memorandum of Understanding Between Lowell Joint School District and California State University, East Bay Student Teaching Agreement, effective July 1, 2025 through June 30, 2030	ACTION/ (RATIFICATION)
2.	Approval of Agreement with Administrative Services Cooperative, Inc. for Student Transportation Services for the 2025/2026 School Year Not to Exceed \$150,000	ACTION/ (RATIFICATION)
3.	Approval of Independent Contract with Dr. Doug Stephey OD MS to provide a Developmental Vision Assessment for the 2025/2026 School Year	ACTION/ (RATIFICATION)
4.	Approval of Independent Contract with Dr. Fabian of Synapse Advance Audiology Inc. to provide a Central Auditory Processing Disorder Evaluation for the 2025/2026 School Year	ACTION/ (RATIFICATION)
5.	Approval of Independent Contractor Agreement with Katelyn Allsman, to provide a BCBA Services, for the 2025-2026 School Year	ACTION/ (RATIFICATION)
6.	Approval of Memorandum of Understanding (MOU) Between Lowell Joint School District and <i>California Southern University, Inc.</i> for the 2025/2026 School Year	ACTION/ (RATIFICATION)
7.	Approval of Independent Contract with Darlene Hanson, SLP of Kindred Speech and Language Inc. to provide a AAC/AT IEE for the 2025/2026 School Year	ACTION/ (RATIFICATION)

B. Business Services – David Bennett

1. Purchase Order Report 2025/26 #1 ACTION/
(RATIFICATION)
2. Consolidated Check Register Listing Report 2025/26 #1 ACTION/
(RATIFICATION)
3. Approval of Agreement with PQBids for Web-Based Program used to Prequalify Contractors ACTION/
(RATIFICATION)
4. Ratification of Professional Services Agreement, Hauffe Company Inc., (HCI) Program Management Services, District Wide (Capital Outlay Projects Fund) ACTION/
(RATIFICATION)
5. Approval of Contract with Whittier Christian High School, for Student Transportation to and from the El Portal Elementary School and Maybrook Campuses During El Portal Elementary Modernization ACTION
6. Approval of Professional Services Agreement, Nigro and Nigro, A Professional Accountancy Corporation, Provide a Performance Audit for State Facilities Program Expenditure Reporting for 57/64766-003, El Portal Elementary School ACTION
7. Approval of Professional Services Agreement, Nigro and Nigro, A Professional Accountancy Corporation, Provide a Performance Audit for State Facilities Program Expenditure Reporting for 57/64766-002, Macy Elementary School ACTION
8. Approval of Professional Services Agreement, Nigro and Nigro, A Professional Accountancy Corporation, Provide a Savings Audit for State Facilities Program Expenditure Reporting for 57/64766-001, Olita Elementary School ACTION

C. Human Resources – Jim Coombs

1. Employer-Employee Relations/Personnel Report 2025/26 #1 Which Includes Hiring, Resignations, Contract Adjustments, and Retirements for Certificated, Classified, and Confidential Employees ACTION/
(RATIFICATION)

D. Education Services – Rhonda Overby

1. Approval of Agreement with Autism Learning Partners to provide ABA Therapy Services for a District Student During Expanded Learning Opportunities Program for the 2025-26 School Year ACTION

2.	Approval of Consultant Agreement with Andy Fierro to Provide Video Recording for Lowell Joint Youth Theatre during the 2025-26 School Year	ACTION
3.	Approval of Ratified Amendment to Agreement with Boys & Girls Club La Habra to provide services for Expanded Learning Opportunities Program for the 2025-26 School Year	ACTION/ (RATIFICATION)
4.	Approval of Consultant Agreement with Eric Chittum to be a Set Constructor/Designer for Lowell Joint School District Performing Arts Lowell Joint Youth Theatre/PowerSource Productions during the 2025-26 School Year	ACTION
5.	Approval of Agreement with Learning Genie to Provide a Software Subscription for use in The Transitional Kindergarten (TK) Program during the 2025–2026 school year	ACTION
6.	Approval of Agreement with YMCA Orange County to provide services for Expanded Learning Opportunities Program during the 2025/26 School Year	ACTION

E. Administrative Services – Carl Erickson

1.	Approval of Agreement with All City Management Services Inc. – Crossing Guard Services	ACTION
2.	Approval of Agreement with West Coast Protection, LLC, dba: Interquest Detection Canines, to Provide Contraband Inspection	ACTION

XI.	Board Member/Superintendent Comments	INFORMATION

XII.	Adjournment	ADJOURNMENT

Recess and/or closed session to be called at the discretion of the Board. Meetings of the Board shall adjourn at or before 11:00 p.m. unless approved by a majority vote of the Board.

Materials related to this agenda submitted to the Board of Trustees less than 72 hours prior to the meeting are available for public inspection by contacting the Superintendent's Office at 11019 Valley Home Avenue, Whittier, CA 90603, or (562) 902-4203 during normal business hours.

The next scheduled Lowell Joint School District Board of Trustees Meeting is Monday, September 8, 2025.

Lowell Joint School District
11019 Valley Home Avenue, Whittier, CA 90603

MINUTES REGULAR MEETING OF THE BOARD OF TRUSTEES
June 23, 2025

Call to Order	President Zegarra called the meeting to order at 6:30 p.m. at Lowell Joint School District, 11019 Valley Home Avenue, Whittier, CA 90603. In compliance with Government Code 54953, the Board will use teleconference, Meeting ID: 849 1373 1563, for closed session in order to allow Members to the Board of Trustees Karen Shaw and Anastasia Shackelford to participate in Closed Session. Any votes taken, as part of the teleconference, will be by roll call and reported out in open session. Ms. Shaw will post this meeting agenda at her location, 101 E. Locust Street, Des Moines, IA 50309. Mrs. Shackelford will post this meeting agenda at her location, 3N024 Crest Ct., West Chicago, IL 60185.
Topics Not on the Agenda	None.
Closed Session	President Zegarra declared the meeting recessed to closed session at 6:32 p.m.
Call to Order	President Zegarra reconvened the meeting to order at 7:32 p.m. In compliance with Government Code 54953, the Board will use teleconference, Meeting ID: 849 1373 1563, for regular session in order to allow Members to the Board of Trustees Karen Shaw and Anastasia Shackelford to participate in Open Session. Any votes taken, as part of the teleconference, will be by roll call in open session. Ms. Shaw will post this meeting agenda at her location, 101 E. Locust Street, Des Moines, IA 50309. Mrs. Shackelford will post this meeting agenda at her location, 3N024 Crest Ct., West Chicago, IL 60185.
	Trustees Present: Attendance Roll Call Vote: Anthony A. Zegarra, Christine J. Berg, Regina L. Woods Karen L. Shaw, Anastasia M. Shackelford
	Trustees Absent: None
	The flag salute was led by Christine Berg, Board of Trustees Vice President.
	Staff Present: Jim Coombs, Superintendent of Schools; Rhonda Overby, Assistant Superintendent of Educational Services; David Bennett, Assistant Superintendent of Business Services; and Carl Erickson, Assistant Superintendent of Administrative Services.
	Staff Absent: None
Reporting out Action (if any) Taken in Closed Session	The Board took action (5-0), by a unanimous roll call vote, to accept and agree to the terms and settlement agreement for State Student Identification Number: 4575611946. The agreement/placement will be paid from Out of Home Care

funds by the SELPA, and authorized the Superintendent or designee to execute the necessary documents.

Introductions and Welcome of Guests	President Zegarra welcomed the guests in attendance and staff members present.
Acknowledgement of Correspondence	Mrs. Berg mentioned an invite to all Board members from La Habra Mayor, Rose Espinoza, to the July 4 th city celebration.
Approval of Agenda	It was moved, seconded, and carried by unanimous roll call vote, (5 – 0) to approve the June 23, 2025, Board agenda.
Approval of Minutes	It was moved, seconded, and carried by unanimous roll call vote, (5-0) to approve the minutes from the June 9, 2025, Regular Board Meeting.
Timely Information from Board and Superintendent – Board President	None.
Topics Not on the Agenda	None.
Submission of Williams Litigation Settlement – Quarterly Uniform Complaint Report for Quarter April 1 – June 30, 2025	It was moved, seconded, and carried by unanimous roll call vote, (5-0) to approve the submission of the Williams Litigation Settlement – Quarterly Uniform Complaint Report for Quarter April 1 – June 30, 2025, with no complaints, and that the Superintendent or designee be authorized to execute the necessary documents.
Resolution 2024/2025 No. 978 Approving Agreement for the SVPP (School Violence Prevention Program) - COPS (Office of Community Oriented Policing Services) funding opportunity	It was moved, seconded, and carried by unanimous roll call vote, (5-0) to adopt Resolution 2024/2025 No. 978 Approving the Agreement and Funding from the SVPP (School Violence Prevention Program)-COPS (Office of Community Oriented Policing Services) funding opportunity and that the Superintendent or designee be authorized to execute the resolution.
Approval of the 2025/26 Consolidated Application	The Consolidated Application must be submitted to the California Department of Education (CDE) for the district to receive funds for categorical programs. The application will be submitted in several parts during each school year. The current submission was certified according to CDE requirements, indicating which programs will be implemented at eligible schools. This submission of the application indicates the District's request for participation in federal programs including: Title I Part A, Basic Grant (Low Income/Low Achieving Students), Title II, Part A (Teacher and Principal Training and Recruiting), Title III, Part A (Limited English Proficient Students [LEP]) and Immigrant Funds and Title IV. Federal guidelines also allow local non-profit private schools to participate with the public school district in Federal programs. Those

participating private schools would be identified in Part I of the application. We do not currently have any eligible schools.

Additional submissions will be submitted to CDE throughout the year after District funding entitlements are known following adoption of the State budget. The next submission will indicate the number of student participants and funding allocations for each program and school site.

It was moved, seconded, and carried by unanimous roll vote, (5-0) to approve the 2025/26 Consolidated Application and its submission to the California Department of Education, and that the Superintendent or designee be authorized to execute the necessary documents.

Approval of District Local
Control Accountability Plan
(LCAP) Approval of District
Local Control Accountability
Plan (LCAP)

School districts, County Offices of Education, and charter schools are required to develop, adopt, and annually update a three-year Local Control and Accountability Plan (LCAP), using a template that was adopted by the California State Board of Education (SBE).

The LCAP is required to identify goals and measure progress for student groups across eight state priority areas. Districts must include in their LCAP (1) actions, services and expenditures for all students and student groups and (2) additional actions and services for “Unduplicated Pupils” including English learners, foster youth, and students qualifying for free or reduced lunch.

Education Code Section 52062(b)(1) requires that the Board of Trustees conduct a Public Hearing on the District Local Control Accountability Plan. A public hearing was held on June 9, 2025, at the Board of Trustees’ regularly scheduled board meeting and a copy has been available for review at the District Office. Additionally, the LCAP was posted on the District’s website with an invitation for public feedback. As a result of the public hearing and website posting, District staff has received no additional comments. The Orange County Office of Education (OCDE) will provide feedback over the next few weeks on any necessary clarifications before final approval by the county.

It was moved, seconded, and carried by unanimous roll call vote, (5-0) to adopt the District Local Control Accountability Plan, and that the Superintendent or designee be authorized to execute the necessary documents.

Approval of Local Indicators
Rating for submission to the
California Dashboard

As part of the LCAP requirements, LEA’s must analyze data from multiple sources to determine progress towards goals. There are five State Indicators and four Local Indicators to measure progress for student groups across the eight state priorities.

For the Local Indicators, LEA’s measure their progress using locally available information such as Benchmarks, SBAC data, Surveys, and FIT reports in response to prompts provided by the state. The results are shared with the local governing board at a regularly scheduled public meeting. The district has “met” the criteria on these local indicators by complying with the guidelines and is ready to upload the Local Indicator data as “Met” to the California Dashboard.

It was moved, seconded, and carried by unanimous roll call vote, (5-0) to approve the Local Indicator data be uploaded as “Met” to the California Dashboard and that the Superintendent or designee be authorized to approve this action.

Adoption of the Proposed
Budget for the 2025-26
School Year

Education Code 42103 requires that the Board of Trustees conduct a Public Hearing of the Proposed Budget for the 2025-26 school year. A Public Hearing was held at the regularly scheduled Board meeting on June 9, 2025, and a copy of the proposed budget has been available at the District Office.

Board approval of the 2025-26 Proposed Budget is required prior to July 1 of each year. The budget projects the District will meet its legal requirement of a three percent (3%) minimum reserve level for the 2025-26 school year.

It was moved, seconded, and carried by unanimous roll call vote, (5-0) to adopt the proposed budget for the 2025-26 school year, and that the Superintendent or designee be authorized to execute the necessary documents.

Appointment of the Citizens
Bond Oversight Committee

On November 5, 2024, the Lowell Joint School District community approved Measure P. Measure P authorizes the District to issue tax-exempt general obligation bonds in an amount up to \$54,000,000. The District will use the proceeds of the bonds in accordance with the projects listed on the Measure P ballot throughout the District.

Once bonds were approved through the Proposition 39 election, and the Board of Trustees officially certified the election, the Board had 60 days in which to establish an independent citizens' bond oversight committee (CBOC). The November 2024 election was formally declared and certified by the Board of Trustees as a part of the December 16, 2024 Board meeting.

The purpose of the CBOC is to review the annual independent financial and performance audits required by Proposition 39, make physical inspections of the school buildings and grounds, and review cost-saving efforts in building design and use. The Board is required to provide administrative and any necessary technical assistance to the committee, including sufficient resources to publicize the committee's conclusions, all without spending bond funds.

The CBOC must consist of at least seven members. No District employee, official, vendor, contractor, or consultant may serve on the committee. The law does not state that members must reside in the District. Members serve a term of two years, without compensation, and may serve no more than three consecutive terms.

The CBOC is charged with ensuring that bond revenues are only spent for the specific projects listed in the Measure P bond, and that no funds are used for any teacher or administrator salaries other than specific staff hired to facilitate the bond project, or for other school operating expenses. The committee is also charged with advising the public if these guidelines are not adhered to.

The committee must include at least the following representatives:

- One (1) member active in a business organization representing the business community located within the district
- One (1) member active in a senior citizens' organization
- One (1) member active in a bona fide taxpayers' organization
- One (1) member who is the parent or guardian of a child enrolled in the district
- One (1) member who is either a parent or guardian of a child enrolled in the district and active in a parent-teacher organization, such as the Parent Teacher Association or School Site Council
- Two (2) members selected from the public at large

Representative Categories:

Representative Names:

One (1) member active in a business organization representing the business community located within the district

Casey Powers

One (1) member active in a senior citizens' organization

One (1) member active in a bona fide taxpayers' organization

Jan Averill

One (1) member who is the parent or guardian of a child enrolled in the district

Veronica Quezada

One (1) member who is either a parent or guardian of a child enrolled in the district and active in a parent-teacher organization, such as the Parent Teacher Association or School Site Council

Paul Caffrey

Two (2) members selected from the public at large

Richard Jones

Taffi Graham

It was moved, seconded, and carried by unanimous roll call vote, (5-0) to approve accept the Citizens' Bond Oversight Committee, and that the Superintendent or designee be authorized to execute the necessary documents.

Public Hearing: Initial Proposal from Lowell Joint School District Management for Reopening Contractual Agreement with California School Employees Association

In accordance with the 2023-2026 Contractual Agreement between the Lowell Joint School District and the California School Employees Association, the Lowell Joint School District Management is re-opening and proposing to negotiate contractual issues.

Article 21 stipulates that for the 2025-26 school year, either party agree to limit reopener negotiations to only Article 9, Article 21, and up to two other articles as designated by the district and up to two other articles as designated by the association.

The Lowell Joint School District Management is proposing to negotiate the following additional section of the Collective Bargaining Agreement:

- Article 21: Benefits

Public hearing opened at 7:44 p.m.

Public hearing closed at 7:45 p.m. with no comments from the public

Public Hearing: Initial Proposal from Lowell Joint School District Management for Reopening Contractual Agreement with Lowell Joint Education Association

In accordance with the 2023-2026 Contractual Agreement between the Lowell Joint School District and the Lowell Joint Education Association Article I: Agreement, the Lowell Joint School District Management is re-opening and proposing to negotiate contractual issues.

Article I stipulates that for the 2025-26 school year, either party shall be able to re-open three articles for 2025-2026.

The Lowell Joint School District Management is proposing to negotiate the following additional section of the Collective Bargaining Agreement:

- Article 24: Benefits

Public hearing opened at 7:45 p.m.

Public hearing closed at 7:46 p.m. with no comments from the public

Approval of Piggyback Contract with Cerritos Ford, for purchase of district vehicles (Hemet Unified School District Bid) (Corrected District)

It was moved, seconded, and carried by unanimous roll call vote, (5-0) to approve the Ratified Piggyback Contract with Cerritos Ford, for district vehicles (Hemet Unified School District) for 2024-2025 school year, and that the Superintendent or designee be authorized to execute the necessary documents.

Consent Calendar

It was moved, seconded, and carried by a unanimous roll call vote, (5 – 0), to approve/ratify the following items, under a consent procedure.

Approval of CSM to Provide E-Rate Compliance Services for the 2025/26 School Year

Approved CSM to provide E-Rate compliance services for the District for the 2025/26 school year, annual base fee of \$8500 plus an amount equal to six percent of Category Two applications submitted during the Term of this Agreement, not to exceed a total amount of \$10,000, and that the Superintendent be authorized to execute the necessary documents.

Approval of OCDE to Provide Electronic Document Management Service for the District per Agreement Number: 10007505 for the 2025/26 School Year

Approved OCDE to provide electronic document management services for the District, to be paid out of the general fund, financial implications are the annual support service fee of \$3726 per year based on the District's ADA, and that the Superintendent be authorized to execute the necessary documents.

Approval of OCDE to Provide Internet Access for the District per Agreement Number: 10007431 for the 2025/26 School Year

Approved OCDE to Provide Internet Access for the District per Agreement Number: 10007431 for the 2025/26 School Year, OCDE agrees to provide the District Internet Access for up to 10GB and support at no cost to the District via the California K-12 High Speed Network, and that the Superintendent be authorized to execute the necessary documents

Approval of OCDE to Provide Network Support and Cyber Security Services for the District per Agreement Number: 10007551 for the 2025/26 School Year

Approved OCDE to Provide Network Support and Cyber Security Services for the District per Agreement Number: 10007551 for the 2025/26 School Year, OCDE agrees to provide the District network support services for data connectivity and access to applications and services via OCDE's network, Applications shall include access to Payroll, Financial, HR, and Time and Attendance, paid out of the general fund, the annual support service fee of \$7900 per year based on the District's ADA, and that the Superintendent be authorized to execute the necessary documents.

Approval of Agreement with Atkinson, Andelson, Loya, Ruud & Romo for Legal Services, Effective July 1, 2025 through June 30, 2028

Approved the Agreement with Atkinson, Andelson, Loya, Ruud & Romo for Legal Services, Effective July 1, 2025 through June 30, 2028, and that the Superintendent or designee be authorized to execute the necessary documents.

	<u>July 1, 2025</u> <u>June 30, 2026</u>	<u>July 1, 2026-</u> <u>June 30, 2027</u>	<u>July 1,</u> <u>2027-</u> <u>June 30,</u> <u>2028</u>
Senior Partners	\$385.00	\$410.00	\$435.00
Partners/Of Counsel/Senior Counsel	\$355.00	\$380.00	\$405.00
Senior Associates	\$340.00	\$365.00	\$390.00
Associates	\$330.00	\$355.00	\$380.00
Electronic Technology Litigation Specialist	\$285.00	\$295.00	\$305.00
Non-Legal Consultants	\$210.00-\$265.00 *	\$215.00-\$270.00 *	\$220.00- \$275.00 *
Senior Paralegals/Law Clerks	\$215.00	\$225.00	\$235.00
Paralegals/Legal Assistants	\$210.00	\$220.00	\$230.00

Approval of Memorandum of Understanding Between Lowell Joint School District and Loyola Marymount University, effective July 1, 2025 through June 30, 2028

Approved the Memorandum of Understanding between Loyola Marymount and Lowell Joint School District, to provide clinical placement experiences to student-trainees enrolled in school psychology specialization, for the period of July 1, 2025 through June 30, 2028, and that the Superintendent or designee be authorized to execute the necessary documents.

Approval of Agreement with Port View Preparatory a Nonpublic Nonsectarian Agency, to Provide additional direct Behavioral

Approved the Ratified Agreement with Behavior and Education Inc., a nonpublic nonsectarian agency, to provide additional direct Behavioral Intervention Services for a select District Students for the 2024/2025 school year and the 2024/2025 Extended School Year (ESY), not to exceed \$100,000.00, and that the Superintendent or designee be authorized to execute the agreement.

Intervention Services for select district students for the 2024/2025 School Year and Extended School Year (ESY)

Purchase Order Listing Report/Check Register 2024/2025 #12

Approved the Purchase Order Listing Report/Check Register 2024/2025 #12, issued May 1, 2025, through May 31, 2025, as attached, and that the Superintendent or designee be authorized to execute the necessary documents.

Consolidated Check Register Listing Report 2024/25 #12

Approved the Consolidated Check 2024/2025 #12, issued May 1, 2025, through May 31, 2025, as attached, and that the Superintendent or designee be authorized to execute the necessary documents.

Approval of Agreement Numbers 10007636, and 10007616 with the Orange County Department of Education (OCDE) for Software Support Services

Approved Agreement Numbers 10007636, and 10007616 with the Orange County Department of Education (OCDE) for Software Support Services for the 2025-2026 school year, and that the Superintendent or designee be authorized to execute the necessary documents.
Human Resources Application Software Support Services - \$12,500
Business Plus System Implementation and Software Support Services - \$32,100

Employer-Employee Relations/Personnel Report 2024/25 #12 Which Includes Hiring, Resignations, Contract Adjustments, and Retirements for Certificated, Classified, and Confidential Employees

Ratified Employer-Employee Relations/Personnel Report 2024/25 #12 as attached, which includes hiring, resignations, contract adjustments, and retirements for certificated, classified, and confidential employees.

Approval of the updated Classified Management Salary Schedule, due to the addition of Accounting Supervisor position

Approved of the updated Classified Management Salary Schedule, due to the addition of Accounting Supervisor position, and that the Superintendent or designee be authorized to execute the necessary documents.

Approval of Agreement with Active Education to provide services for Expanded Learning Opportunities Program during the 2025-2026 School Year

Approved the Agreement with Active Education to provide services for Expanded Learning Opportunities Program during the 2025-2026 School Year, at a cost of \$470,000.00 to be paid by ELO-P funds, and that the Superintendent or designee be authorized to execute the necessary documents.

Approval of Agreement with Boys & Girls Club La Habra to provide services for Expanded Learning

Approved the agreement with Boys & Girls Club La Habra, for the 2025-2026 School Year, not to exceed \$560,000.000 to be paid by the ELO-P funds, and that the Superintendent or designee be authorized to execute the necessary documents.

Opportunities Program for
the 2025-26 School Year

Approval of Consultant Agreement with Brennen Logan to provide Theatre Instruction (voice, choreography, stage direction and support) for Lowell Joint Performing Arts/Lowell Joint Youth Theatre/PowerSource Productions for the 2025-26 School Year

Approved the consultant agreement made with Brennen Logan to provide Theatre Instruction and support (voice, choreography, stage direction and stage support) for Lowell Joint Performing Arts/Lowell Joint Youth Theatre/PowerSource Productions for the 2025-26 school year, at an amount of \$35 an hour not to exceed \$8,000.00, to be paid by ELO-P funds, and that the Superintendent or designee be authorized to execute the necessary documents.

Approval of Consultant Agreement with Camille Vargas to provide Theatre Instruction (voice, choreography, stage direction and support) for Lowell Joint Performing Arts/Lowell Joint Youth Theatre/PowerSource Productions for the 2025-26 School Year

Approved the consultant agreement made with Camille Vargas to provide Theatre Instruction and support (voice, choreography, stage direction and stage support) for Lowell Joint Performing Arts/Lowell Joint Youth Theatre/PowerSource Productions for the 2025-26 school year, at an amount of \$35 an hour not to exceed \$8,000.00, to be paid by ELO-P funds, and that the Superintendent or designee be authorized to execute the necessary documents.

Approval of Consultant Agreement with Christine Logan to provide Theatre Instruction (voice, Choreography, stage direction and support) for Lowell Joint Performing Arts/Lowell Joint Youth Theatre/PowerSource Productions for the 2025-26 School Year

Approved the consultant agreement made with Christine Logan to provide Theatre Instruction and support (voice, choreography, stage direction and stage support) for Lowell Joint Performing Arts/Lowell Joint Youth Theatre/PowerSource Productions for the 2025-26 school year, at an amount of \$35 an hour not to exceed \$8,000.00, to be paid by ELO-P funds, and that the Superintendent or designee be authorized to execute the necessary documents.

Approval of the Agreement with JAMPANA ENTERPRISES LLC “Code Ninjas” to provide services for Expanded Learning Opportunities

Approved the after-school contract with Code Ninjas, Fullerton, for the 2025-2026 school year, not to exceed \$500,000.00, to be paid by ELO-P funds, and that the Superintendent or designee be authorized to execute the necessary documents.

Program during the
2025-26 School Year

Approval of Consultant
Agreement with Katie
Ludlam to provide
Theatre Instruction
(voice, choreography,
stage direction and
support) for Lowell
Joint Performing
Arts/Lowell Joint
Youth
Theatre/PowerSource
Productions for the
2025-26 School Year

Approved the consultant agreement made with Katie Ludlam to provide Theatre Instruction and support (voice, choreography, stage direction and stage support) for Lowell Joint Performing Arts/Lowell Joint Youth Theatre/PowerSource Productions for the 2025-26 school year, at an amount off \$35 an hour not to exceed \$8,000.00, to be paid by ELO-P funds, and that the Superintendent or designee be authorized to execute the necessary documents.

Approval of
Agreement with
Muckenthaler Cultural
Center to provide
services for Expanded
Learning Opportunities
Program during the
2025-2026 School
Year

Approved Agreement with Muckenthaler Cultural Center to provide services for Expanded Learning Opportunities Program during the 2025-2026 School Year, not to exceed \$400,000.00, to be paid by ELO-P funds, and that the Superintendent or designee be authorized to execute the necessary documents.

Approval of Ratified
Amendment to Agreement
with JAMPANA
ENTERPRISES LLC
“Code
Ninjas” to provide services
for Expanded Learning
Opportunities Program
during the 2024/25 School
Year

Approved the Ratified Amendment to the Agreement with Code Ninjas to provide services during the 2024/25 school year are at the cost of an additional \$5,900 at an amount not to exceed \$155,900.00, and that the Superintendent or designee be authorized to execute the necessary documents.

Approval of Consultant
Agreement with Ron
Gutterman to provide
Theatre Instruction (voice,
choreography, stage
direction and support) for
Lowell Joint Performing
Arts/ Lowell Joint Youth
Theatre/PowerSource

Approved the consultant agreement made with Ron Gutterman to provide Theatre Instruction and support (voice, choreography, stage direction and stage support) for Lowell Joint Performing Arts/Lowell Joint Youth Theatre/PowerSource Productions for the 2025-26 school year, at an amount of \$35 an hour not to exceed \$8,000.00, to be paid by ELO-P funds, and that the Superintendent or designee be authorized to execute the necessary documents.

Productions for the 2025-26
School Year

Approval of Consultant
Agreement with Tana
Carmichael to be a Costume
Designer for Lowell Joint
School District Performing
Arts 2025-26 Lowell Joint
Youth Theatre
PowerSource
Productions.

Approved the consultant agreement made with Tana Carmichael to be a costume designer for LJSD Performing Arts Lowell Joint Youth Theatre/PowerSource productions for the 2025-26 school year, at an amount of \$1000.00 per show, not to exceed \$5000.00, to be paid by ELO-P funds, and that the Superintendent or designee be authorized to execute the necessary documents.

Approval of Consultant
Agreement with Andy
Fierro to Provide Video
Production Services for
Rancho-Starbuck Dance
Department

Approved the Consultant Agreement with Andy Fierro to provide Video Production Services for Rancho-Starbuck Dance Department show on May 1, 2025, at a cost not to exceed \$1,100.00. Funding for this expenditure will be covered by Rancho-Starbuck Donation funds, and that the Superintendent or designee be authorized to execute the necessary documents.

Board
Member/Superintendent
Comments

Mr. Coombs thanked Rhonda Overby and her team and David Bennett and his team for all of the details and items that came from their departments presented at the board meeting.

Mrs. Shackelford thanked everyone for allowing them to join the board meeting via zoom.

Ms. Shaw also thanked Rhonda Overby and David Bennett for all of their hard work.

Adjournment

President Zegarra adjourned the meeting at 7:48 p.m. in accordance with Government Code Section 54956.9 (a, b, c) and indicated no further public action would be taken.

Date Approved:

Clerk/President/Secretary to the Board of Trustees



Orange County Department of Education
Educational Services Division

**Williams Settlement Legislation
Quarterly Report of Uniform Complaints
2024-25**

District: Lowell Joint School District

District Contact: Jim Coombs

Title: Superintendent of Schools

☐	Quarter #1	July 1 – September 30, 2024	Report due by October 31, 2024
☐	Quarter #2	October 1 – December 31, 2024	Report due by January 31, 2025
☐	Quarter #3	January 1 – March 31, 2025	Report due by April 30, 2025
☒	Quarter #4	April 1 – June 30, 2025	Report due by July 31, 2025

Check the box that applies:

- ☒ No complaints were filed with any school in the district during the quarter indicated above.
- ☐ Complaints were filed with schools in the district during the quarter indicated above. The following chart summarizes the nature and resolution of the complaints.

Type of Complaint	Total # of Complaints	# Resolved	# Unresolved
Textbooks and Instructional Materials	0	0	0
Teacher Vacancies or Misassignments	0	0	0
Facility Conditions	0	0	0
TOTALS	0	0	0

Name of Superintendent: Jim Coombs

Signature of Superintendent: _____

Date: June 25, 2025

Please submit to:

Orange County Department of Education
P.O. Box 9050, Costa Mesa, CA 92628-9050
Attention: Alicia Gonzalez, Sr. Administrative Assistant, Redhill / R101

Phone: (714) 966-4336 Email: aliciagonzalez@ocde.us



**Los Angeles County
Office of Education**

**Williams Lawsuit Settlement
Quarterly Report on Uniform Complaints 2024-2025**

DISTRICT NAME Lowell Joint School District	DATE 06/23/2025
PERSON COMPLETING THIS FORM Jim Coombs	TITLE Superintendent of Schools

Quarter Covered by This Report (Check One Below):

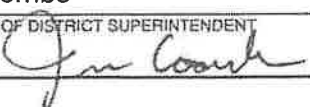
☐ 1st QTR	July 1 to September 30	Due: Friday, October 18, 2024
☐ 2nd QTR	October 1 to December 31	Due: Friday, January 17, 2025
☐ 3rd QTR	January 1 to March 31	Due: Friday, April 18, 2025
☒ 4th QTR	April 1 to June 30	Due: Friday, July 18, 2025

DATE REPORT WAS PRESENTED TO THE GOVERNING BOARD AT A REGULARLY SCHEDULED MEETING
10/07/2024

Please Check the Box That Applies:

- ☒ No complaints were filed with any school in the district during the quarter indicated above.
- ☐ Complaints were filed with schools in the district during the quarter indicated above. The following chart summarizes the nature and resolution of these complaints:

	Number of Complaints Received in Quarter	Number of Complaints Resolved	Number of Complaints Unresolved
Instructional Materials			
Facilities			
Teacher Vacancy and Misassignment			
TOTAL	0	0	0

PRINT NAME OF DISTRICT SUPERINTENDENT Jim Coombs	DATE 06/23/2025
SIGNATURE OF DISTRICT SUPERINTENDENT 	

Submit the Quarterly Summary Using Canvas Account

<https://laoepd.instructure.com/courses/715>

or Mail to:

Los Angeles County Office of Education
Attn: Francisco Jimenez, Williams Instructional Materials
9300 Imperial Highway, ASM/Williams ECW 284
Downey, CA 90242

Telephone: (562) 803-8382
Fax: (562) 803-8325
Email: Jimenez_Francisco@laoe.edu

LOWELL JOINT SCHOOL DISTRICT

RESOLUTION 2024-25 No. 978

A RESOLUTION OF THE BOARD OF TRUSTEES OF THE LOWELL JOINT SCHOOL DISTRICT OF LOS ANGELES AND ORANGE COUNTIES, CALIFORNIA, APPROVING AGREEMENT FOR THE SVPP (SCHOOL VIOLENCE PREVENTION PROGRAM) – COPS (OFFICE OF COMMUNITY ORIENTED POLICING SERVICES) FUNDING OPPORTUNITY

WHEREAS, the Office of Community Oriented Policing Services (COPS) is the component of the US Department of Justice responsible for advancing the practice of community policing by the nation's state, local, territorial and tribal law enforcement agencies through information and grant resources. The COPS Office School Violence Prevention Program (SVPP) provides funding directly to states, units of local government, Indian tribes and their public agencies to improve security at schools and on school grounds in the recipient's jurisdiction through evidence-based school safety programs;

WHEREAS, If granted the SVPP funds LJSD will work in partnership with the La Habra Police Department, La Habra City Council and La Habra City School District to increase our school safety by:

- Utilizing access control measures: implementing key cards and smart locks to regulate entry points, ensuring only authorized individuals have access to specific areas during pre-approved times.
- Development of Emergency Response Plans: Collaborating with the La Habra Police Department to develop and regularly rehearse comprehensive response plans for potential threats or safety issues, including after regular school hours crisis response.
- Collaboration with Local EMS and Neighboring Schools: Forging partnerships with law enforcement agencies and neighboring school districts to share information, enhance response times, and facilitate seamless collaboration in ensuring campus safety.
- Implementation of Clear Signage and Expectations: Ensuring proper signage and communication of expectations for all after-school activities to visitors, parents, law enforcement, and staff.
- Enhancement of Parking Lot Safety: Ensuring well-lit, clearly marked, and monitored parking lots through the use of technology such as high-definition cameras, license plate

reader (LPR) cameras, audio detection equipment, and designated points of contact equipped with emergency communication devices.

- Designation of Emergency Contacts: Designating a point of contact for each event equipped with emergency communication devices to facilitate quick response in case of emergencies.
- Monitoring of Campus with Technology: Integrating technology such as high-definition cameras to effectively monitor campus access points and feed live streams to responding law enforcement or EMS

WHEREAS, Lowell Joint School District is applying for \$400,000.00 to assist with the goals and objectives stated above. The agreement would begin on October 1, 2025 and be valid for 36 months;

WHEREAS, purpose of this agreement is to move forward with the SVPP - COPS funding opportunity;

APPROVED AND ADOPTED THIS 23rd day of June, 2025, at the regular meeting of the Board of Education of the Lowell Joint School District.

APPROVED AND ADOPTED this 23rd day of June, 2025.

AYES: Anthony Zegarra, Christine Berg, Regina Woods, Karen Shaw, Anastasia Shackelford

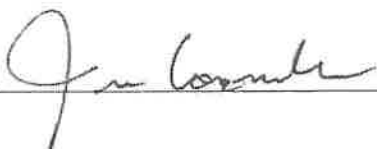
NOES: None

ABSENT: None

ABSTAIN: None

I, Jim Coombs, Secretary to the Board of Trustees of the Lowell Joint School District of Los Angeles and Orange Counties, California, hereby certify that the above and foregoing resolution was duly and regularly adopted by the said Board at a regular meeting thereof held on the 23rd day of June, 2025, and passed by a unanimous vote of those present.

IN WITNESS WHEREOF, I have hereunto set my hand and seal the 23rd day of June, 2025.

A handwritten signature in dark ink, appearing to read "Jim Coombs", is written over a horizontal line.

Jim Coombs, Secretary to the Board of Trustees

NOTICE OF PUBLIC HEARING
LOWELL JOINT SCHOOL DISTRICT

Lowell Joint School District will hold a Public Hearing to hear the Initial Proposal from the Lowell Joint School District Management for a Successor Agreement with California School Employees Association. The District is required to hold a public hearing to encourage participation by parents, teachers, members of the community interested in the affairs of the School District, and bargaining unit leaders.

NOTICE IS HEREBY GIVEN that the Board of Trustees of the Lowell Joint School District at its regular meeting to be held on June 23, 2025, will hold a public hearing at which the Board of Trustees shall hear the initial proposal from the Lowell Joint School District Management for a successor agreement with California School Employees Association to the 2025-2026 contract.

The June 23, 2025, Board meeting of the District will begin at 7:30 p.m. in the District's Board Room located at 11019 Valley Home, Whittier, California, 90603.

Questions and/or comments should be directed to Jim Coombs, Superintendent, (562) 943-0211.

NOTICE OF PUBLIC HEARING
LOWELL JOINT SCHOOL DISTRICT

Lowell Joint School District will hold a Public Hearing to hear the Initial Proposal from the Lowell Joint School District Management for a Successor Agreement with Lowell Joint Education Association. The District is required to hold a public hearing to encourage participation by parents, teachers, members of the community interested in the affairs of the School District, and bargaining unit leaders.

NOTICE IS HEREBY GIVEN that the Board of Trustees of the Lowell Joint School District at its regular meeting to be held on June 23, 2025, will hold a public hearing at which the Board of Trustees shall hear the initial proposal from the Lowell Joint School District Management for a successor agreement with Lowell Joint Education Association to the 2025-2026 contract.

The June 23, 2025, Board meeting of the District will begin at 7:30 p.m. in the District's Board Room located at 11019 Valley Home, Whittier, California, 90603.

Questions and/or comments should be directed to Jim Coombs, Superintendent, (562) 943-0211.

LOWELL JOINT SD

PURCHASE ORDER DETAIL REPORT

BOARD OF TRUSTEES MEETING 06/23/2025

FROM 05/01/2025 TO 05/31/2025

PO NUMBER	VENDOR	PO TOTAL	ACCOUNT AMOUNT	ACCOUNT NUMBER	PSEUDO / OBJECT DESCRIPTION
U99B0037	AMERICAN ENGINEERING LABORATOR	228,000.00	228,000.00	4000220001	Measure P Bond - El Portal / Inspector of Record
U99B0038	INDEPENDENT CONSTRUCTION INSPEC	249,600.00	249,600.00	4000220007	Measure P Bond - RS / Inspector of Record
U99B0039	ENCORP	11,960.00	11,960.00	4000220001	Measure P Bond - El Portal / Consultant/Contractor
U99B0040	ENCORP	1,360.00	1,360.00	4000220007	Measure P Bond - RS / Consultant/Contractor
U99F0123	GOODMAN TREE SERVICE	900.00	900.00	0100000106	GF-Unrest-Not Applicable / Repairs or Maintenance
U99F0124	CERRITOS FORD INC	78,464.71	78,464.71	1226000007	ELOP-Capital Outlay / Equipment
U99F0127	KOMPAN CALIFORNIA INC	111,540.36	111,540.36	0191000003	CalFireGrant-Jordan / Non Capitalized Equipment
U99F0128	IMAGE APPAREL FOR BUSINESS	386.75	386.75	0100000098	GF-Unrest-Not Applicable / Uniforms
U99F0129	GOODMAN TREE SERVICE	900.00	900.00	0100000101	GF-Unrest-Not Applicable / Repairs or Maintenance
U99I0001	JASON DOSS	450.00	450.00	0195640012	MedCal/SpEd / Conslt/Ind Contractors(NonEmp)
U99I0002	JASON DOSS	225.00	225.00	0195640012	MedCal/SpEd / Conslt/Ind Contractors(NonEmp)
U99M0584	AMERICAN EXPRESS	656.65	656.65	0130100093	EP-Title1/SPSA G2/A8 / Materials and Supplies
U99M0585	AMERICAN EXPRESS	55.25	55.25	1226000002	ELOP/ChildDevFund / Materials and Supplies
U99M0586	AMERICAN EXPRESS	30.85	30.85	1226000002	ELOP/ChildDevFund / Materials and Supplies
U99M0587	AMERICAN EXPRESS	1,728.00	1,728.00	1261050005	PS/CSPP / Travel and Conferences
U99M0588	AMERICAN EXPRESS	318.24	318.24	1261050005	PS/CSPP / Travel and Conferences
U99M0589	AMERICAN EXPRESS	1,346.81	1,346.81	0130100055	EP-SPSA G3/A3 / Materials and Supplies
U99M0590	AMERICAN EXPRESS	835.68	835.68	0130100073	EP-Title1/SPSA-G1A8 / Materials and Supplies
U99M0591	AMERICAN EXPRESS	66.29	66.29	0105110064	RS Site/Science / Materials and Supplies
U99M0592	AMERICAN EXPRESS	3,118.68	3,118.68	0100560001	GF-SiteAllocMA-Not Applicable / Materials and Supplies
U99M0593	AMERICAN EXPRESS	600.00	600.00	0162660006	EdServices / Travel and Conferences
U99M0594	AMERICAN EXPRESS	272.27	272.27	0100000317	GF_UNRESTRICTED_SUPT / Materials and Supplies
U99M0595	AMERICAN EXPRESS	690.07	690.07	0100000317	GF_UNRESTRICTED_SUPT / Materials and Supplies
U99M0596	AMERICAN EXPRESS	153.75	153.75	1226000002	ELOP/ChildDevFund / Materials and Supplies
U99M0597	AMERICAN EXPRESS	383.88	383.88	0100560007	GF-SiteAllocMA / Materials and Supplies
U99M0598	AMERICAN EXPRESS	771.43	771.43	0100560007	GF-SiteAllocMA / Materials and Supplies

LOWELL JOINT SD

PURCHASE ORDER DETAIL REPORT

BOARD OF TRUSTEES MEETING 06/23/2025

FROM 05/01/2025 TO 05/31/2025

PO NUMBER	VENDOR	PO TOTAL	ACCOUNT AMOUNT	ACCOUNT NUMBER	PSEUDO / OBJECT DESCRIPTION
U99M0599	AMERICAN EXPRESS	2,769.68	2,769.68	0100000317 4300	GF_UNRESTRICTED_SUPT / Materials and Supplies
U99M0600	AMERICAN EXPRESS	5,527.54	5,527.54	0100000317 4300	GF_UNRESTRICTED_SUPT / Materials and Supplies
U99M0601	AMERICAN EXPRESS	27,000.00	27,000.00	0191000003 6170	CalFireGrant-Jordan / Land Improvements
U99M0602	AMERICAN EXPRESS	40,000.00	40,000.00	0191000004 6170	CalFireGrant-Macy / Land Improvements
U99M0603	AMERICAN EXPRESS	500.00	500.00	0167620001 4300	LJYT-ArtMusicBlkGrt / Materials and Supplies
U99M0604	AMERICAN EXPRESS	85.11	85.11	0100000317 4300	GF_UNRESTRICTED_SUPT / Materials and Supplies
U99M0605	AMERICAN EXPRESS	58.56	58.56	0167620001 4300	LJYT-ArtMusicBlkGrt / Materials and Supplies
U99M0606	AMERICAN EXPRESS	299.00	299.00	0174350016 5200	LREBG-Instr.PD / Travel and Conferences
U99M0607	AMERICAN EXPRESS	599.00	599.00	0162660006 5200	EdServices / Travel and Conferences
U99M0608	AMERICAN EXPRESS	4,706.22	4,706.22	1226000019 4300	ELOP-SummerPowerSource / Materials and Supplies
U99M0609	AMERICAN EXPRESS	979.91	979.91	0101910102 4300	CYBHL-Heluna-Guidance / Materials and Supplies
U99M0610	AMAZON CAPITAL SERVICES	66.26	66.26	1226000019 4300	ELOP-SummerPowerSource / Materials and Supplies
U99M0611	AMAZON CAPITAL SERVICES	2,929.86	2,929.86	1226000019 4300	ELOP-SummerPowerSource / Materials and Supplies
U99R0558	DEAD AND BURIED INC.	2,401.27	2,401.27	0167620001 4300	LJYT-ArtMusicBlkGrt / Materials and Supplies
U99R0579	WHITTIER CHRISTIAN HIGH SCHOOL	2,010.00	2,010.00	4000220009 5800	MeasP-RS-NonCapital / Prof/ConsultingServ&Oper Exp
U99R0580	BEARCOM	3,204.39	3,204.39	0130100090 4300	T1-EP/SPSA G3/A4 / Materials and Supplies
U99R0581	BEARCOM	353.60	353.60	0100560001 4300	GF-SiteAllocMA-Not Applicable / Materials and Supplies
U99R0582	TRINIDAD, GINA	1,299.48	1,299.48	0167620001 4300	LJYT-ArtMusicBlkGrt / Materials and Supplies
U99R0583	REGISTRAR-RECORDER/COUNTY CLER	2,610.16	2,610.16	0100000067 5820	GF-Unrest-Not Applicable / Legal, Audit, & Election Costs
U99R0584	SCHOLASTIC MAGAZINES	3,223.23	3,223.23	0100560007 4300	GF-SiteAllocMA / Materials and Supplies
U99R0585	NEWSELA	2,581.28	2,581.28	0100560007 4300	GF-SiteAllocMA / Materials and Supplies
U99R0586	PRESENTATION SYSTEMS	9,590.35	9,590.35	0130100072 4300	Title 1-SPSA G4/A3 / Materials and Supplies
U99R0587	AMAZON CAPITAL SERVICES	53.17	53.17	0195640039 4300	MediCal-OL/RSP / Materials and Supplies
U99R0588	FULLERTON JOINT UNION HS DIST	392.00	392.00	4000220009 5800	MeasP-RS-NonCapital / Prof/ConsultingServ&Oper Exp
U99R0589	CURRICULUM ASSOCIATES	978.09	978.09	0130100087 4300	EP-T3/SPSA-G4/A2 / Materials and Supplies
U99R0590	AMAZON CAPITAL SERVICES	228.03	228.03	0165000014 4300	GF-SpEd-Not Applicable / Materials and Supplies

LOWELL JOINT SD

PURCHASE ORDER DETAIL REPORT

BOARD OF TRUSTEES MEETING 06/23/2025

FROM 05/01/2025 TO 05/31/2025

PO NUMBER	VENDOR	PO TOTAL	ACCOUNT AMOUNT	ACCOUNT NUMBER	PSEUDO / OBJECT DESCRIPTION
U99R0591	AMAZON CAPITAL SERVICES	248.91	248.91	0165000014 4300	GF-SpEd-Not Applicable / Materials and Supplies
U99R0592	AMAZON CAPITAL SERVICES	189.21	189.21	0165000014 4300	GF-SpEd-Not Applicable / Materials and Supplies
U99R0593	AMAZON CAPITAL SERVICES	280.95	280.95	01000000317 4300	GF_UNRESTRICTED_SUPT / Materials and Supplies
U99R0594	AMAZON CAPITAL SERVICES	280.95	280.95	01000000317 4300	GF_UNRESTRICTED_SUPT / Materials and Supplies
U99R0595	AMAZON CAPITAL SERVICES	74.92	74.92	01000000317 4300	GF_UNRESTRICTED_SUPT / Materials and Supplies
U99R0596	AMAZON CAPITAL SERVICES	209.89	209.89	01000000317 4300	GF_UNRESTRICTED_SUPT / Materials and Supplies
U99R0597	AMAZON CAPITAL SERVICES	854.33	854.33	01000000317 4300	GF_UNRESTRICTED_SUPT / Materials and Supplies
U99R0598	AMAZON CAPITAL SERVICES	227.17	227.17	0105110044 4300	GF-SiteAlloc RS / Materials and Supplies
U99R0599	AMAZON CAPITAL SERVICES	170.04	170.04	0105110044 4300	GF-SiteAlloc RS / Materials and Supplies
U99R0600	AMAZON CAPITAL SERVICES	173.99	173.99	0165000014 4300	GF-SpEd-Not Applicable / Materials and Supplies
U99R0601	AMERICAN EXPRESS	112.89	112.89	0165000014 4300	GF-SpEd-Not Applicable / Materials and Supplies
U99R0602	AMAZON CAPITAL SERVICES	465.50	465.50	0100000474 4300	RS-ConstructionMissingItems / Materials and Supplies
U99R0603	AMAZON CAPITAL SERVICES	63.80	63.80	0100000474 4300	RS-ConstructionMissingItems / Materials and Supplies
U99R0604	BLICK ART MATERIALS	779.26	779.26	0100000474 4300	RS-ConstructionMissingItems / Materials and Supplies
U99R0605	LAKESHORE LEARNING MATERIALS L	540.28	540.28	0100560007 4300	GF-SiteAllocMA / Materials and Supplies
U99R0606	ACTION TROPHY	78.30	78.30	0100540008 4300	GF-SiteAllocJO / Materials and Supplies
U99R0607	AMAZON CAPITAL SERVICES	1,344.05	1,344.05	0100000058 4300	DO/Health Services / Materials and Supplies
U99R0608	SOUTHWEST SCHOOL SUPPLY	5,668.51	5,668.51	0100560007 4300	GF-SiteAllocMA / Materials and Supplies
U99R0609	AMAZON CAPITAL SERVICES	104.80	104.80	0165030003 4300	GF-SpEd-Low/Incid-Not Applicabl / Materials and Supplies
U99R0610	6CRICKETS INC	25,750.00	25,750.00	1226000002 5810	ELOP/ChildDevFund / Licenses/Technology
U99R0611	OCDE	661.90	661.90	1226000002 5200	ELOP/ChildDevFund / Travel and Conferences
U99R0612	PACIFIC COAST ENTERTAINMENT	1,059.40	1,059.40	1226000002 4300	ELOP/ChildDevFund / Materials and Supplies
U99R0613	SOUTHWEST SCHOOL SUPPLY	3,307.50	3,307.50	0100560001 4300	GF-SiteAllocMA-Not Applicable / Materials and Supplies
U99R0614	UNIVERSITY EYE CENTER AT KETCH	238.97	238.97	0195640012 5800	MedCal/SpEd / Prof/ConsultingServ&Oper Exp
U99R0615	AMAZON CAPITAL SERVICES	278.80	278.80	0167620001 4300	LJYT-ArtMusicBlkGr / Materials and Supplies
U99R0616	NEW MANAGEMENT INC	1,508.33	1,508.33	0100000098 4300	GF-Unrest-Not Applicable / Materials and Supplies

LOWELL JOINT SD
PURCHASE ORDER DETAIL REPORT
 BOARD OF TRUSTEES MEETING 06/23/2025

FROM 05/01/2025 TO 05/31/2025

PO NUMBER	VENDOR	PO TOTAL	ACCOUNT AMOUNT	ACCOUNT NUMBER	PSEUDO / OBJECT DESCRIPTION
U99R0617	SOUTHWEST SCHOOL SUPPLY	3,878.35	3,878.35	0100000009 4300	GF-Unrest-Not Applicable / Materials and Supplies
U99R0621	OCDE	640.00	640.00	0195640046 5800	MediCal-JO/ParentParticipation / Prof/ConsultingServ&Ope
U99R0622	OCDE	480.00	480.00	0195640046 5800	MediCal-JO/ParentParticipation / Prof/ConsultingServ&Ope
U99R0623	LINDA TAKACS	200.00	200.00	1202600004 4300	LJYT-Fd. 12-Supplies / Materials and Supplies
U99R0624	WHITTIER AREA COMMUNITY CHURCH	1,600.00	1,600.00	0167620001 5800	LJYT-ArtMusicBlkGr / Prof/ConsultingServ&Oper Exp
U99R0625	OCDE	440.00	440.00	016500063 5800	GF-SPECIAL ED / Prof/ConsultingServ&Oper Exp
U99R0626	OCDE	480.00	480.00	0195640046 5800	MediCal-JO/ParentParticipation / Prof/ConsultingServ&Ope
U99R0627	WHITTIER CHRISTIAN HIGH SCHOOL	740.35	740.35	0130100057 4300	EP-SPSA G2/A4 / Materials and Supplies
U99R0629	DEAD AND BURIED INC.	585.65	585.65	0167620001 4300	LJYT-ArtMusicBlkGr / Materials and Supplies
U99R0630	TRINIDAD, GINA	844.53	844.53	0101910102 4300	CYBHI-Heluna-Guindance / Materials and Supplies
U99R0631	SENTRY SIGNS & PRINTING	802.23	802.23	0100540008 4300	GF-SiteAllocJO / Materials and Supplies
U99R0632	PACIFIC MARINE MAMMAL CENTER	4,914.00	4,914.00	1226000019 4300	ELOP-SummerPowerSource / Materials and Supplies
U99R0633	OCDE	3,000.00	3,000.00	1261050011 5800	CSPP-PS/General / Prof/ConsultingServ&Oper Exp
U99R0634	SCHOLASTIC	458.27	458.27	0109110014 4300	GF-DonRS / Materials and Supplies
U99R0635	CENGAGE LEARNING	15,504.79	15,504.79	0163000002 4130	GF-Lottery-Not Applicable / Textbooks
U99R0636	BENCHMARK EDUCATION COMPANY	3,777.68	3,777.68	0163000002 4130	GF-Lottery-Not Applicable / Textbooks
U99R0637	THE CERAMIC SHOP	310.87	310.87	0100000474 4300	RS-ConstructionMissingItems / Materials and Supplies
U99R0638	AMAZON CAPITAL SERVICES	27.83	27.83	0195640010 4300	MedCal/SE-Olita / Materials and Supplies
U99R0639	AMAZON CAPITAL SERVICES	101.08	101.08	0195640024 4300	MedCal/SE-Health / Materials and Supplies
U99R0640	AMAZON CAPITAL SERVICES	187.70	187.70	0100980006 4300	GF-DonMdwGreen-Not Applicable / Materials and Supplies
U99R0641	AMAZON CAPITAL SERVICES	13.26	13.26	0165000014 4300	GF-SpEd-Not Applicable / Materials and Supplies
U99R0642	OCDE	486.20	486.20	0195640048 5800	MC-JordanInterpServices / Prof/ConsultingServ&Oper Exp
U99R0643	BEHAVIOR AND EDUCATION INC	375.00	375.00	0165020040 5100	OOHC-NPA/NPS / Subagreement for Serv
U99R0644	COLLISION COFFEE ROASTERS	200.00	200.00	0100000317 4300	GF_UNRESTRICTED_SUPT / Materials and Supplies
U99R0645	AMAZON CAPITAL SERVICES	732.04	732.04	0108880020 4300	GF-Technology-Not Applicable / Materials and Supplies
U99R0646	VEX ROBOTICS	14,563.85	14,563.85	1226000019 4300	ELOP-SummerPowerSource / Materials and Supplies

LOWELL JOINT SD

PURCHASE ORDER DETAIL REPORT

BOARD OF TRUSTEES MEETING 06/23/2025

FROM 05/01/2025 TO 05/31/2025

PO NUMBER	VENDOR	PO TOTAL	ACCOUNT AMOUNT	ACCOUNT NUMBER	PSEUDO / OBJECT DESCRIPTION
U99R0647	APPLE INC.	2,419.97	2,419.97	1226000002 4300	ELOP/ChildDevFund / Materials and Supplies
U99R0648	DELL MARKETING L.P.	2,690.94	2,690.94	1226000019 4300	ELOP-SummerPowerSource / Materials and Supplies
U99R0649	PACIFIC METAL BUILDINGS INC	36,730.70	36,730.70	1226000002 4300	ELOP/ChildDevFund / Materials and Supplies
U99R0650	TECHNICOLOR PRINTING	5,493.53	2,010.56	1226000002 4300	ELOP/ChildDevFund / Materials and Supplies
			3,482.97	1226000019 4300	ELOP-SummerPowerSource / Materials and Supplies
U99R0651	VISTA HIGHER LEARNING	6,695.44	6,695.44	0100000475 4130	SpanishTextbooks / Textbooks
U99R0653	TRINIDAD, GINA	53.04	53.04	1226000002 4300	ELOP/ChildDevFund / Materials and Supplies
U99R0654	PACIFIC COAST ENTERTAINMENT	93.93	93.93	1226000002 4300	ELOP/ChildDevFund / Materials and Supplies
U99R0656	PAUL LUNA / LUNA INK	700.00	700.00	0105110044 4300	GF-SiteAlloc RS / Materials and Supplies
U99R0657	AMAZON CAPITAL SERVICES	325.43	325.43	0108880020 4300	GF-Technology-Not Applicable / Materials and Supplies
U99R0658	IMAGE APPAREL FOR BUSINESS	929.31	929.31	0100000098 5895	GF-Unrest-Not Applicable / Uniforms
U99T0031	MONOPRICE INC.	680.09	680.09	0108880020 4300	GF-Technology-Not Applicable / Materials and Supplies
W99X0006	SOUTHWEST SCHOOL SUPPLY	609.00	609.00	0100590005 4300	GF-SiteAllocOL / Materials and Supplies

Fund 01 Total:

287,292.17

Fund 12 Total:

186,084.40

Fund 40 Total:

493,322.00

Total Amount of Purchase Orders:

966,698.57

LOWELL JOINT SD
Consolidated Check Register
from 5/1/2025 to 5/31/2025

Check	Payee ID	Payee Name	Reference	Subs	Check Date	Cancel Date	Type	Status	Check Amount
99 00008499	V9903531	DAVIS, SUMMER	04282025	OH	05/02/2025		MW	IS	1,512.00
99 00008500	V9903673	GOODMAN TREE SERVICE	04212025	OH	05/02/2025		MW	IS	4,400.00
99 00008501	I9900030	ISAAC BAHR	04302025	OH	05/02/2025		MW	IS	1,500.00
99 00008502	V9900095	JONES SCHOOL SUPPLY COMPANY	V9900095	OH	05/02/2025		MW	IS	71.05
99 00008503	E9900156	NICOLE BALLARD	04202025	OH	05/02/2025		MW	IS	8.96
99 00008504	V9903592	Republican Women of La Habra	032625	OH	05/02/2025		MW	IS	450.00
99 00008505	V9900175	SENTRY SIGNS & PRINTING	5537	OH	05/02/2025		MW	IS	174.70
99 00008506	V9903866	SHUTTERFLY LIFETOUCH LLC	58439875	OH	05/02/2025		MW	IS	225.91
99 00008507	U9900004	SOUTHERN CALIFORNIA EDISON	0321042125JO	OH	05/02/2025		MW	IS	4,835.66
99 00008508	U9900005	SOUTHERN CALIFORNIA GAS CO	0321042125DO	OH	05/02/2025		MW	IS	2,301.25
99 00008509	F9900066	UNITED RENTALS (NORTH AMERICA)	235534602-011	OH	05/02/2025		MW	IS	1,093.95
99 00008510	V9903493	VERNES PLUMBING INC	12467573	OH	05/02/2025		MW	IS	3,835.00
99 00008511	V9900203	VEX ROBOTICS	803774	OH	05/02/2025		MW	IS	10,146.43
99 00008512	V9903760	WESTED	25-1426	OH	05/02/2025		MW	IS	3,000.00
99 00008513	V9903259	A-TECH CONSULTING INC	INV250561	OH	05/02/2025		MW	IS	1,850.00
99 00008514	V9903853	ANDERSONS	4601057	OH	05/02/2025		MW	IS	1,757.31
99 00008515	V9903356	EMERGENCYKITS.COM	110268	OH	05/02/2025		MW	IS	2,488.83
99 00008516	V9903647	FORMA ENGINEERING & CONTRACTIN	3 RETENTION	OH	05/02/2025		MW	IS	29,025.45
99 00008517	V9903862	BOXHUB INC	BX-US-36069	OH	05/02/2025		MW	IS	4,706.25
99 00008518	B9990011	GHATAODE BANNON ARCHITECTS	6036	OH	05/02/2025		MW	IS	9,669.69
99 00008519	B9903229	HAULAWAY STORAGE CONTAINERS	002250631	OH	05/02/2025		MW	IS	291.20
99 00008520	V9900163	ROCHESTER 100 INC.	INV094414	OH	05/05/2025		MW	IS	408.90
99 00008521	V9900179	SOUTHWEST SCHOOL SUPPLY	6029598949	OH	05/05/2025		MW	IS	76.65
99 00008522	V9903856	V.I. REED & CANE INC.	5515	OH	05/05/2025		MW	IS	149.85
99 00008523	V9900209	WILLIAM V.MACGILL & CO.	IN0899009	OH	05/05/2025		MW	IS	5,469.53
99 00008524	V9900179	SOUTHWEST SCHOOL SUPPLY	6029523534	OH	05/05/2025		MW	IS	377.45
99 00008525	V9903815	ALL CITY MANAGEMENT SERVICES I	100347	OH	05/06/2025		MW	IS	6,396.20
99 00008526	V9903842	AMAZON CAPITAL SERVICES	IVTC-9HXP-V66V	OH	05/06/2025		MW	IS	995.87
99 00008527	V9900015	APPLE INC.	MB68449540	OH	05/06/2025		MW	IS	1,718.55
99 00008528	S9990001	BEHAVIOR AND EDUCATION INC	10486673	OH	05/06/2025		MW	IS	7,831.00
99 00008529	F9900011	BEST LAWNMOWER INC.	113445	OH	05/06/2025		MW	IS	1,592.88
99 00008530	V9900028	BUENA PARK PLAQUE & TROPHY	105393	OH	05/06/2025		MW	IS	190.31
99 00008531	U9900001	CITY OF LA HABRA WATER DEPARTM	031125041025	OH	05/06/2025		MW	IS	2,315.95
99 00008532	V9903403	DANA MORRISON	02212025	OH	05/06/2025		MW	IS	194.94
99 00008533	V9903718	DIFFERENT ROADS TO LEARNING IN	30582	OH	05/06/2025		MW	IS	673.56
99 00008534	V9903580	GRAINGER INC	9462002495	OH	05/06/2025		MW	IS	598.08
99 00008535	E9903707	Hutcherson, Angela	112024-012025	OH	05/06/2025		MW	IS	1,235.22
99 00008536	E9900084	JIM COOMBS	04252025	OH	05/06/2025		MW	RV	97.13
99 00008537	E9900093	KAITLYN CAMPBELL	02242025	OH	05/06/2025		MW	IS	292.22

LOWELL JOINT SD
Consolidated Check Register
from 5/1/2025 to 5/31/2025

Check	Payee ID	Payee Name	Reference	Subs	Check Date	Cancel Date	Type	Status	Check Amount
99 00008538	V9900101	LA HABRA ROTARY CLUB	2767	OH	05/06/2025		MW	IS	360.00
99 00008539	V9900103	LAKESHORE LEARNING MATERIALS L	90688675	OH	05/06/2025		MW	IS	643.89
99 00008540	V9903749	PRESENTATION SYSTEMS	66483	OH	05/06/2025		MW	IS	13,860.63
99 00008541	V9903665	SUBWAY	MARCH 2025	OH	05/06/2025		MW	IS	1,950.00
99 00008542	V9903283	GATTO, NANCY	04302025	OH	05/07/2025		MW	IS	66.62
99 00008543	E9900138	MARIKATE ELMQUIST	04292025	OH	05/07/2025		MW	IS	397.69
99 00008544	V9903657	REFRIGERATION SUPPLIES DISTRIB	49381811-00	OH	05/07/2025		MW	IS	1,086.94
99 00008545	V9900155	REGISTRAR-RECORDER/COUNTY CLER	25-2171	OH	05/07/2025		MW	IS	2,610.16
99 00008546	E9900184	SHAINA MONTIEL	04162025	OH	05/07/2025		MW	IS	127.60
99 00008547	U9900004	SOUTHERN CALIFORNIA EDISON	0325042325MG	OH	05/07/2025		MW	IS	5,392.76
99 00008548	U9900006	SUBURBAN WATER SYSTEMS	188052301405	OH	05/07/2025		MW	IS	7,286.24
99 00008549	V9903470	WHITTIER CHRISTIAN HIGH SCHOOL	150563	OH	05/07/2025		MW	IS	1,306.25
99 00008550	I9900024	ZOE KINNE	RANCHO 4/6 & 4/9	OH	05/07/2025		MW	IS	300.00
99 00008551	V9900015	APPLE INC.	MB69207116	OH	05/07/2025		MW	IS	2,679.27
99 00008552	V9900134	OCDE	94U11665	OH	05/07/2025		MW	IS	240.00
99 00008553	V9903521	YMCA OF ORANGE COUNTY	ELOP PGRM	OH	05/07/2025		MW	IS	68,240.80
99 00008554	V9900056	DELTA DENTAL OF CALIFORNIA	BE006529110	OH	05/08/2025		MW	IS	2,375.10
99 00008555	E9900067	ERIC CHITTUM	RANCHO SPRING	OH	05/08/2025		MW	IS	2,000.00
99 00008556	V9903867	FLOWERS BY ROBERT TAYLOR	155354	OH	05/08/2025		MW	IS	400.00
99 00008557	I9903532	LOGAN, BRENNEN	RANCHO 4/30-4/31	OH	05/08/2025		MW	IS	287.50
99 00008558	V9903864	NSAV SOLUTIONS	INV202500862	OH	05/08/2025		MW	IS	3,610.28
99 00008559	V9900163	ROCHESTER 100 INC.	WEBINV0016513	OH	05/08/2025		MW	IS	522.00
99 00008560	V9903485	TAKACS, LINDA	04302025	OH	05/08/2025		MW	IS	690.52
99 00008561	V9903470	WHITTIER CHRISTIAN HIGH SCHOOL	150566	OH	05/08/2025		MW	IS	1,900.00
99 00008562	V9903352	ACTIVE EDUCATION	2579	OH	05/08/2025		MW	IS	26,637.80
99 00008563	E9900067	ERIC CHITTUM	LJYT SPRING 2025	OH	05/08/2025		MW	IS	2,000.00
99 00008564	B9990010	ERICKSON-HALL CONSTRUCTION	APP #5	OH	05/08/2025		MW	IS	683,405.82
99 00008565	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	MAY25VLIFBU	OH	05/09/2025		MW	IS	1,456.24
99 00008566	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	MAY25DDR	OH	05/09/2025		MW	IS	33,700.30
99 00008567	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	MAY25VSR	OH	05/09/2025		MW	IS	7,019.10
99 00008568	F9900054	PLUMBING WHOLESAL OUTLET	S100864921.001	OH	05/09/2025		MW	IS	627.54
99 00008569	V9903809	PORTVIEW PREPARATORY INC	26673	OH	05/09/2025		MW	IS	10,951.07
99 00008570	F9900060	THE SHERWIN-WILLIAMS CO.	0386-3	OH	05/09/2025		MW	IS	152.11
99 00008571	F9900066	UNITED RENTALS (NORTH AMERICA)	235534602-012	OH	05/09/2025		MW	IS	119.78
99 00008572	V9903470	WHITTIER CHRISTIAN HIGH SCHOOL	150572	OH	05/09/2025		MW	IS	3,823.75
99 00008573	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	MAY25VLIFBU	OH	05/09/2025		MW	IS	102.98
99 00008574	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	MAY25DDA	OH	05/09/2025		MW	IS	2,155.32
99 00008575	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	MAY25VSA	OH	05/09/2025		MW	IS	452.52
99 00008576	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	MAY25VLIFBU	OH	05/09/2025		MW	IS	61.21

LOWELL JOINT SD
Consolidated Check Register
 from 5/1/2025 to 5/31/2025

Check	Payee ID	Payee Name	Reference	Subs Check Date	Cancel Date	Type	Status	Check Amount
99 00008577	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	MAY25DDA	OH 05/09/2025		MW	IS	1,348.27
99 00008578	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	MAY25VSA	OH 05/09/2025		MW	IS	283.08
99 00008579	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	MAY25VLIFBU	OH 05/09/2025		MW	IS	4.76
99 00008580	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	MAY25DDR	OH 05/09/2025		MW	IS	186.92
99 00008581	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	MAY25VSR	OH 05/09/2025		MW	IS	38.95
99 00008582	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	MAY25VLIFAD	OH 05/09/2025		MW	IS	8.65
99 00008583	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	MAY25DDA	OH 05/09/2025		MW	IS	119.74
99 00008584	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	MAY25VSA	OH 05/09/2025		MW	IS	25.14
99 00008585	VOID.CONTIVoid - Continued Stub		CONTINUE	OH 05/12/2025		VM	VD	0.00
99 00008586	VOID.CONTIVoid - Continued Stub		CONTINUE	OH 05/12/2025		VM	VD	0.00
99 00008587	V9900013	AMERICAN EXPRESS	VLN9YFYBTDZ	OH 05/12/2025		MW	IS	23,026.49
99 00008588	U9900004	SOUTHERN CALIFORNIA EDISON	0401043025MAL	OH 05/12/2025		MW	IS	73.48
99 00008589	U9900005	SOUTHERN CALIFORNIA GAS CO	0328042825MA	OH 05/12/2025		MW	IS	514.55
99 00008590	U9900006	SUBURBAN WATER SYSTEMS	180013604447	OH 05/12/2025		MW	IS	3,389.04
99 00008591	U9900010	WARE DISPOSAL	1764015	OH 05/12/2025		MW	IS	7,007.61
99 00008592	V9903688	WHITTIER COLLEGE	39001	OH 05/12/2025		MW	IS	5,280.00
99 00008593	VOID.CONTIVoid - Continued Stub		CONTINUE	OH 05/12/2025		VM	VD	0.00
99 00008594	V9900013	AMERICAN EXPRESS	31776A	OH 05/12/2025		MW	IS	16,113.78
99 00008595	V9903787	Boys & Girls Clubs of La Habra	MAR 1-31 25	OH 05/12/2025		MW	IS	25,700.61
99 00008596	V9903750	PROSOLVE LLC	2039	OH 05/12/2025		MW	IS	11,662.00
99 00008597	V9903845	Arizona Machinery LLC / Stotz	E06366A	OH 05/12/2025		MW	IS	89,576.88
99 00008598	E9900127	LINDA TAKACS	051725	OH 05/14/2025		MW	IS	200.00
99 00008599	V9903860	MAYRA SANCHEZ	050725	OH 05/16/2025		MW	IS	65.52
99 00008600	V9900134	OCDE	94UJ2352	OH 05/16/2025		MW	IS	440.00
99 00008601	V9903389	PEAP-PRESIDENT'S EDUCATION AWA	506089	OH 05/16/2025		MW	IS	148.05
99 00008602	F9900053	PEST OPTIONS INC.	462638	OH 05/16/2025		MW	IS	134.83
99 00008603	U9900004	SOUTHERN CALIFORNIA EDISON	0404050525OL	OH 05/16/2025		MW	IS	5,390.19
99 00008604	U9900006	SUBURBAN WATER SYSTEMS	181004364422	OH 05/16/2025		MW	IS	757.24
99 00008605	U9900008	T-MOBILE	0404050325	OH 05/16/2025		MW	IS	105.00
99 00008606	I9900011	TRINIDAD, GINA	ARTS4ALL PROG	OH 05/16/2025		MW	IS	1,299.48
99 00008607	N9900014	UNITED REFRIGERATION INC.	11905721-00	OH 05/16/2025		MW	IS	334.59
99 00008608	F9900066	UNITED RENTALS (NORTH AMERICA)	235534602-012A	OH 05/16/2025		MW	IS	119.78
99 00008609	V9903391	UNIVERSITY EYE CENTER AT KETCH	5836290425	OH 05/16/2025		MW	IS	216.26
99 00008610	F9900069	WALTERS WHOLESale ELECTRIC	S127835134.001	OH 05/16/2025		MW	IS	1,631.32
99 00008611	V9903597	WHITTIER AREA COMMUNITY CHURCH	051725LJSD	OH 05/16/2025		MW	IS	1,600.00
99 00008612	V9903560	PACIFIC COAST ENTERTAINMENT	1227280	OH 05/16/2025		MW	IS	1,059.40
99 00008613	V9903855	TSHIRT STORM INC	16507_#2	OH 05/16/2025		MW	IS	633.94
99 00008614	N9900003	BERNIER REFRIGERATION GENERATI	28892	OH 05/16/2025		MW	IS	2,000.00
99 00008615	V9903871	BRIAN PILKINGTON	APRIL 2025	OH 05/16/2025		MW	IS	84.30

LOWELL JOINT SD
Consolidated Check Register
 from 5/1/2025 to 5/31/2025

Check	Payee ID	Payee Name	Reference	Subs	Check Date	Cancel Date	Type	Status	Check Amount
99 00008616	F9900014	BUG FLIP	APRIL 2025	OH	05/16/2025		MW	IS	210.00
99 00008617	N9900015	Continental Sales	APRIL 2025	OH	05/16/2025		MW	IS	15,916.00
99 00008618	N9900004	DRIFTWOOD DAIRY	APRIL 2025	OH	05/16/2025		MW	IS	13,324.75
99 00008619	N9900007	GOLD STAR FOODS	APRIL 2025	OH	05/16/2025		MW	IS	47,651.06
99 00008620	F9900045	LADY BUGS ENVIRONMENTAL TERMIT	40668	OH	05/16/2025		MW	IS	55.00
99 00008621	N9900017	SOCAL4 LLC	APRIL 2025	OH	05/16/2025		MW	IS	3,748.50
99 00008622	V9903665	SUBWAY	APRIL 2025	OH	05/16/2025		MW	IS	1,950.00
99 00008623	F9900010	BEE GONE BEE REMOVAL SERVICE	6104	OH	05/19/2025		MW	IS	525.00
99 00008624	F9900014	BUG FLIP	76629	OH	05/19/2025		MW	IS	2,065.00
99 00008625	F9900015	CANNINGS HARDWARE LA HABRA	402345	OH	05/19/2025		MW	IS	112.53
99 00008626	V9903854	CHILD CREATIVITY LAB INC	967	OH	05/19/2025		MW	IS	259.80
99 00008627	V9900055	DEAD AND BURIED INC.	84822	OH	05/19/2025		MW	IS	5,180.91
99 00008628	F9900072	EWING IRRIGATION PRODUCTS INC	25673626	OH	05/19/2025		MW	IS	650.67
99 00008629	S9990002	GALLAGHER PEDIATRIC THERAP	11804	OH	05/19/2025		MW	IS	3,312.35
99 00008630	F9900033	GLASBY MAINTENANCE SUPPLY	351232A	OH	05/19/2025		MW	IS	7,119.94
99 00008631	V9903303	iPRINT TECHNOLOGIES	1224647	OH	05/19/2025		MW	IS	122.67
99 00008632	F9900040	JAMES HARDWARE COMPANY	2504-123486	OH	05/19/2025		MW	IS	92.38
99 00008633	V9900103	LAKESHORE LEARNING MATERIALS L	90727025	OH	05/19/2025		MW	IS	301.15
99 00008634	V9900104	LEADER SERVICES	CDS 7165	OH	05/19/2025		MW	IS	1,264.66
99 00008635	V9903568	LITTLE EARS THERAPY CENTER	15	OH	05/19/2025		MW	IS	480.00
99 00008636	VOID.CONTVoid - Continued Stub		CONTINUE	OH	05/19/2025		VM	VD	0.00
99 00008637	F9900059	THE HOME DEPOT PRO INSTITUTION	862173655	OH	05/19/2025		MW	IS	6,368.89
99 00008638	E9900044	CHRISTIAN MANGOLD	C.MANGOLD	OH	05/19/2025		MW	IS	69.98
99 00008639	E9900139	MARY BRIMMAGE	M.BRIMM	OH	05/19/2025		MW	IS	379.84
99 00008640	V9900134	OCDE	425	OH	05/19/2025		MW	IS	3,000.00
99 00008641	E9900258	STEPHANIE PEREZ	S.PEREZ MAY	OH	05/19/2025		MW	IS	29.84
99 00008642	V9903521	YMCA OF ORANGE COUNTY	ELOP PGRM	OH	05/19/2025		MW	IS	71,471.63
99 00008643	N9900009	P & R PAPER SUPPLY COMPANY	APRIL 2025	OH	05/19/2025		MW	IS	11,118.58
99 00008644	V9900007	ACTION TROPHY	96412	OH	05/20/2025		MW	IS	78.30
99 00008645	V9900008	ADMINISTRATIVE SERV. CO-OP	21190	OH	05/20/2025		MW	IS	78,298.53
99 00008646	E9900220	ALISON GARDNER	04302025	OH	05/20/2025		MW	IS	65.12
99 00008647	E9900009	AMANDA MALM	05052025	OH	05/20/2025		MW	IS	455.22
99 00008648	F9900007	AUTOZONE	05499182666	OH	05/20/2025		MW	IS	266.47
99 00008649	I9900002	BYRON FERGUSON DBA ALL AMERICA	1017	OH	05/20/2025		MW	IS	360.00
99 00008650	V9903553	CA DEPARTMENT OF JUSTICE	814691	OH	05/20/2025		MW	IS	224.00
99 00008651	E9900450	CHRIS BERG	05072025A	OH	05/20/2025		MW	IS	293.73
99 00008652	V9903585	COSTELLO, LARRY	05012025	OH	05/20/2025		MW	IS	700.00
99 00008653	V9900052	DASH MEDICAL GLOVES	INV1331068	OH	05/20/2025		MW	IS	91.60
99 00008654	V9900070	EXPLORE LEARNING	CL-00031752	OH	05/20/2025		MW	IS	14,338.35

LOWELL JOINT SD

Consolidated Check Register

from 5/1/2025 to 5/31/2025

Check	Payee ID	Payee Name	Reference	Subs	Check Date	Cancel Date	Type	Status	Check Amount
99 00008655	V9900088	IMPERIAL BAND INSTRUMENTS INC	M76601	OH	05/20/2025		MW	IS	2,046.28
99 00008656	V9903875	JASON DOSS	7002	OH	05/20/2025		MW	IS	450.00
99 00008657	E9900084	JIM COOMBS	05092025	OH	05/20/2025		MW	IS	153.93
99 00008658	F9900047	LOWES	998752-OUIPGH	OH	05/20/2025		MW	IS	1,065.68
99 00008659	E9900140	MARY JO EVANOFF	04252025	OH	05/20/2025		MW	IS	81.07
99 00008660	V9903583	MORALES, OMAR	05012025	OH	05/20/2025		MW	IS	700.00
99 00008661	I9900016	PAUL LUNA / LUNA INK	0825	OH	05/20/2025		MW	IS	1,500.00
99 00008662	V9900148	QUADIANT FINANCE USA INC.	MAY STMT	OH	05/20/2025		MW	IS	1,000.00
99 00008663	V9900163	ROCHESTER 100 INC.	INV095936	OH	05/20/2025		MW	IS	1,097.27
99 00008664	V9903330	SCHOLASTIC	W5736302BF	OH	05/20/2025		MW	IS	458.27
99 00008665	V9900169	SCHOOL DATEBOOKS	S25-0302094	OH	05/20/2025		MW	IS	1,062.61
99 00008666	F9900057	SOUTHEAST CONSTRUCTION PRODUCT	2504-195249	OH	05/20/2025		MW	IS	298.25
99 00008667	V9900179	SOUTHWEST SCHOOL SUPPLY	6030639586	OH	05/20/2025		MW	IS	3,381.92
99 00008668	V9900179	SOUTHWEST SCHOOL SUPPLY	6030639577	OH	05/20/2025		MW	IS	1,991.07
99 00008669	V9900179	SOUTHWEST SCHOOL SUPPLY	6030639586	OH	05/20/2025		MW	IS	797.39
99 00008670	V9903776	6crickets Inc	20250424-LJSD	OH	05/20/2025		MW	IS	25,750.00
99 00008671	N9900016	GAPE PIZZA	APRIL 2025	OH	05/20/2025		MW	IS	4,268.00
99 00008672	V9903711	JP Pizza Inc	APRIL 2025	OH	05/20/2025		MW	IS	2,090.00
99 00008673	B9990010	ERICKSON-HALL CONSTRUCTION	APP #1	OH	05/20/2025		MW	IS	27,291.60
99 00008674	B9990011	GHATAODE BANNON ARCHITECTS	6052	OH	05/20/2025		MW	IS	5,161.23
99 00008675	I9900016	PAUL LUNA / LUNA INK	0825	OH	05/20/2025		MW	IS	1,000.00
99 00008676	V9903815	ALL CITY MANAGEMENT SERVICES I	100675	OH	05/21/2025		MW	IS	5,762.34
99 00008677	V9903653	ART SPECIALTIES INC	2163	OH	05/21/2025		MW	IS	4,519.30
99 00008678	V9900020	ATKINSON ANDELSON LOYA RUUD &	748558	OH	05/21/2025		MW	IS	31,148.75
99 00008679	V9900025	BLICK ART MATERIALS	5345103	OH	05/21/2025		MW	IS	1,034.70
99 00008680	V9903347	BREAKOUT INC.	58743	OH	05/21/2025		MW	IS	158.00
99 00008681	V9903623	Certified Transportation Servi	01-198141	OH	05/21/2025		MW	IS	4,471.20
99 00008682	E9900127	LINDA TAKACS	051625	OH	05/21/2025		MW	IS	165.58
99 00008683	V9900154	READYREFRESH BY NESTLE	15E0032621385	OH	05/21/2025		MW	IS	80.64
99 00008684	V9900175	SENTRY SIGNS & PRINTING	5565	OH	05/21/2025		MW	IS	802.23
99 00008685	U9900005	SOUTHERN CALIFORNIA GAS CO	0409050825OL	OH	05/21/2025		MW	IS	552.19
99 00008686	U9900006	SUBURBAN WATER SYSTEMS	102300373602	OH	05/21/2025		MW	IS	1,611.13
99 00008687	I9900011	TRINIDAD, GINA	DECALS	OH	05/21/2025		MW	IS	1,806.68
99 00008688	V9903647	FORMA ENGINEERING & CONTRACTIN	1030	OH	05/21/2025		MW	IS	24,000.00
99 00008689	B9990011	GHATAODE BANNON ARCHITECTS	6035	OH	05/21/2025		MW	IS	22,184.00
99 00008690	V9900070	EXPLORE LEARNING	CL-00027748	OH	05/22/2025		MW	IS	3,295.00
99 00008691	F9900021	CULVER-NEUWLN	45014	OH	05/22/2025		MW	IS	130,936.21
99 00008692	V9903400	CHARTER COMMUNICATIONS	233779101050125	OH	05/23/2025		MW	IS	5,533.20
99 00008693	E9900127	LINDA TAKACS	051925	OH	05/23/2025		MW	IS	70.63

LOWELL JOINT SD

Consolidated Check Register

from 5/1/2025 to 5/31/2025

Check	Payee ID	Payee Name	Reference	Subs	Check Date	Cancel Date	Type	Status	Check Amount
99 00008694	I9903328	RUSSELL, EILEEN	CONTRACT	OH	05/23/2025		MW	IS	84.00
99 00008695	U9900004	SOUTHERN CALIFORNIA EDISON	0411051225RS	OH	05/23/2025		MW	IS	6,443.24
99 00008696	U9900005	SOUTHERN CALIFORNIA GAS CO	0414051325RS	OH	05/23/2025		MW	IS	1,090.73
99 00008697	U9900008	T-MOBILE	0321040205	OH	05/23/2025		MW	IS	142.68
99 00008698	V9903787	Boys & Girls Clubs of La Habra	APR 1-30	OH	05/23/2025		MW	IS	34,552.35
99 00008699	V9903520	JAMPANA ENTERPRISES LLC DBA CO	PS3-04-2425	OH	05/23/2025		MW	IS	19,307.75
99 00008700	V9903872	PACIFIC METAL BUILDINGS INC	QTE-025312	OH	05/23/2025		MW	IS	3,134.00
99 00008701	V9903815	ALL CITY MANAGEMENT SERVICES I	101122	OH	05/27/2025		MW	IS	6,402.60
99 00008702	V9903842	AMAZON CAPITAL SERVICES	1X1D-LQVD-3RXC	OH	05/27/2025		MW	IS	1,318.62
99 00008703	S9990001	BEHAVIOR AND EDUCATION INC	10486671	OH	05/27/2025		MW	IS	375.00
99 00008704	F9900019	CITY OF LA HABRA	1000074	OH	05/27/2025		MW	IS	2,252.55
99 00008705	U9900001	CITY OF LA HABRA WATER DEPARTM	040325050425	OH	05/27/2025		MW	IS	1,251.14
99 00008706	V9903849	COLLISION COFFEE ROASTERS	0005	OH	05/27/2025		MW	IS	200.00
99 00008707	V9903673	GOODMAN TREE SERVICE	05132025	OH	05/27/2025		MW	IS	900.00
99 00008708	E9900225	SELAH BAUTISTA	05122025A	OH	05/27/2025		MW	IS	107.45
99 00008709	V9900179	SOUTHWEST SCHOOL SUPPLY	6030542195	OH	05/27/2025		MW	IS	1,125.66
99 00008710	V9900179	SOUTHWEST SCHOOL SUPPLY	6030542192	OH	05/27/2025		MW	IS	2,407.61
99 00008711	F9900019	CITY OF LA HABRA	1000074	OH	05/27/2025		MW	IS	383.18
99 00008712	B9990010	ERICKSON-HALL CONSTRUCTION	APP #2	OH	05/27/2025		MW	IS	4,386.15
99 00008713	E9900471	ALMA DE LA MORA-FARMER	04082025	OH	05/28/2025		MW	IS	176.81
99 00008714	R9900016	ANDREA DESMOND	JUN2025	OH	05/28/2025		MW	IS	710.15
99 00008715	E9900026	BARBARA CASTILLO	05082025	OH	05/28/2025		MW	IS	244.65
99 00008716	V9900025	BLICK ART MATERIALS	5449869	OH	05/28/2025		MW	IS	1,192.78
99 00008717	V9900028	BUENA PARK PLAQUE & TROPHY	105895	OH	05/28/2025		MW	IS	27.19
99 00008718	E9900470	BYANKA HARO-BANUELOS	05082025	OH	05/28/2025		MW	IS	190.75
99 00008719	V9903849	COLLISION COFFEE ROASTERS	0004	OH	05/28/2025		MW	IS	150.00
99 00008720	V9900053	DATA IMPRESSIONS	0028169-IN	OH	05/28/2025		MW	IS	3,354.73
99 00008721	R9900019	DEBORAH NEEDHAM	JUN2025	OH	05/28/2025		MW	IS	768.52
99 00008722	R9900022	Eric Chittum	JUN2025	OH	05/28/2025		MW	IS	580.11
99 00008723	R9900007	GAYLE ROGERS	JUN2025	OH	05/28/2025		MW	IS	426.70
99 00008724	R9900018	GRACIA HAWORTH	JUN2025	OH	05/28/2025		MW	IS	1,695.04
99 00008725	R9900021	Krista Karr	JUN2025	OH	05/28/2025		MW	IS	768.52
99 00008726	R9900013	MARGARET DUMADAG	JUN2025	OH	05/28/2025		MW	IS	768.52
99 00008727	R9900010	PENNY MAYERCHECK	JUN2025	OH	05/28/2025		MW	IS	1,695.04
99 00008728	R9900017	REBECCA SMITH	JUN2025	OH	05/28/2025		MW	IS	768.52
99 00008729	R9900011	RONALD RANDOLPH	JUN2025	OH	05/28/2025		MW	IS	1,011.40
99 00008730	V9900179	SOUTHWEST SCHOOL SUPPLY	6030542190	OH	05/28/2025		MW	IS	3,627.96
99 00008731	V9903362	DELL MARKETING L.P.	10812238688	OH	05/28/2025		MW	IS	10,306.45
99 00008732	B9990011	GHATAODE BANNON ARCHITECTS	6061	OH	05/28/2025		MW	IS	4,800.00

LOWELL JOINT SD
Consolidated Check Register
from 5/1/2025 to 5/31/2025

Check	Payee ID	Payee Name	Reference	Subs	Check Date	Cancel Date	Type	Status	Check Amount
99 00008733	B9903229	HAULAWAY STORAGE CONTAINERS	002255523	OH	05/28/2025		MW	IS	291.20
99 00008734	V9900179	SOUTHWEST SCHOOL SUPPLY	6030639588	OH	05/29/2025		MW	IS	4,077.00
99 00008735	VOID.CONTI	Void - Continued Stub	CONTINUE	OH	05/30/2025		VM	VD	0.00
99 00008736	V9900179	SOUTHWEST SCHOOL SUPPLY	6031068472	OH	05/30/2025		MW	IS	7,817.91

Issued: 1,948,483.90
Reversed: 97.13
99 Bank Total: 1,948,581.03

Grand Total: 1,948,581.03

**LOWELL JOINT SCHOOL DISTRICT
EMPLOYER-EMPLOYEE RELATIONS/PERSONNEL REPORT 2024/25 #12**

June 23, 2025

I. CERTIFICATED EMPLOYEES

A. CHANGE OF STATUS

NAME	<u>EFFECTIVE</u> DATE	END DATE	SITE	COMMENTS
Fonti, Allison	06/02/2025	06/06/2025	MG Summer Camp	Industrial Illness Leave

B. EXTRA DUTY PAY/STIPENDS

NAME	<u>EFFECTIVE</u> DATE	END DATE	SITE	COMMENTS
Lopez, Christina	08/12/2024	05/30/2025	JO	To be paid a total of \$75.00 for being a Master Teacher for Biola University (January – May 2025). To be Paid by check from Biola University.

C. CHANGE OF STATUS / RETIREMENT

NAME	EFFECTIVE DATE	SITE	COMMENT
Cox, Casey	05/30/2025	OL	Olita Special Education Teacher - Resignation
Fonti, Alison	07/02/2025	MA	Macy Elementary Teacher - Retirement
Christerson, Carin	07/01/2025	RS	Rancho Starbuck Intermediate Teacher - Retirement
Brander, Holly	05/30/2025	DO	DO TOSA Resignation – Correction of EER #11 2024-2025

****It is further recommended that these individuals be approved for substitute teaching at the rate of \$200.00 per day and/or \$50.00 an hour rate (not to exceed six hours) as applicable and to include: Professional Development, Saturday School, Site Support Duties, Intervention, and PowerSource, Power Source Summer Camp, ESY, Lowell Joint Youth Theater, Rancho Starbuck Performing Arts.**

****It is further recommended that the individuals listed in Certificated Salaries for 2024-2025 is approved to instruct in the Intervention Programs. The rate of pay is \$50.00/hour and will be paid from Title I or LCFF Supplemental Grant Funds.**

****It is further recommended that individuals listed in Certificated Salaries for 2024-2025 serve as home school teachers, if needed, for the 2024-2025 school year at a rate of \$50.00/hour, not to exceed five hours per week, per student. Mileage will be paid at the IRS Standard Mileage Rate for the 2024-2025 school year.**

2025-2026 School Year

D. 2025/2026 CONTRACTS**

<u>NAME</u>	<u>EFFECTIVE</u> <u>DATE</u>	<u>CLASS/COL/</u> <u>STEP</u>	<u>SITE</u>	<u>COMMENTS</u>
Lopez, Sandra	08/11/2025	C4/S1	OL	Special Education grade teacher, temporary contract
Little, Amanda	08/11/2025	C3/S1	RS	7/8 English Teacher, temporary contract

E. District office 2025-2026

Takacs, Linda	<u>08/11/2025</u>		<u>DO</u>	Induction Program Coordinator. To be paid \$4,000.00 per month, not to exceed \$40,000.00 for serving as Induction Program Coordinator. To be paid from General Fund/Educator Effectiveness Grant.
Hensley, Sharon	<u>08/11/2025</u>		<u>DO</u>	CARE Intern Program Coordinator. To be paid \$4,000.00 per month, not to exceed \$40,000.00 for serving as Intern Program Coordinator CARE. To be paid from Out of Home Care Funds
Brimmage, Mary	07/01/2025	Column 5	DO	ELOP Coordinator on Special Assignment

F. CERTIFICATED SALARIES FOR 2025-2026**

<u>NAME</u>	<u>SITE</u>	<u>CLASS</u>	<u>STEP</u>	<u>COMMENTS</u>
Abell, Amy	El Portal	5	25	
Aguerrebere-Coleman, Rachel	Macy	5	26	
Aldecoa, Kelly	Macy	5	26	
Anderson, Ryan	Rancho Starbuck	5	25	
Andres, Paolo	Rancho Starbuck	5	7	
Arreguin, Barbara	Rancho Starbuck	5	24	
Austin, Stephanie	Rancho Starbuck	5	19	
Ballard, Nicole	Macy	5	19	
Behura, Sylvia	Rancho Starbuck	5	26	
Benton, Nataly	Jordan	5	5	
Bernhard, Carol	Macy	5	26	
Blackler, Samantha	District Office	5	15	SLP salary schedule
Bolanos, Jocelyn	Meadow Green	5	10	
Borsari, Julie	Olita	5	18	
Brooks, Kimberly	El Portal	5	26	
Cacioppo, Bianca	El Portal	5	8	
Campbell, Kaitlyn	El Portal	5	14	Early Learning TOSA – El Portal
Carrillo, Valerie	Jordan	4	9	
Carty, Lyn	El Portal	5	6	
Castillo, Barbara	District Office	5	21	MTSS TOSA
Cazares, Ariana	Rancho Starbuck	5	13	
Champion, Rebecca	District Office	5	23	Technology TOSA
Chavez, Karen	Olita	5	26	
Coleman, Deborah	Olita	5	25	
Cooke, Kristen	Olita	5	20	Early Learning TOSA – Olita
Daniel, Kari	El Portal	5	26	
De La Haye, Melissa	El Portal	5	14	
De La Mora-Farmer, Alma	Jordan	2	2	
Dowell, Megan	El Portal	4	8	
Estrada, Elizabeth	Jordan	4	3	
Farrens, Sylvia	District Office	5	21	SLP salary schedule
Feaster, Amy	Rancho Starbuck	3	7	
Felton, Leslie	El Portal	5	26	

Fiscus, Riley	El Portal	3	4	
Freedman-Finch, Alyssa	District Office	5	5	SLP salary schedule
Galindo, Marta	Jordan	5	12	Early Learning TOSA – Jordan
Galli, David	Rancho Starbuck	5	13	
Galli, Jessica	Rancho Starbuck	5	8	
Gatto, Nancy	District Office	5	10	Early Learning Innovation TOSA
Ghabour, Kylee	Meadow Green	3	15	
Gober, Kristen	Meadow Green	5	26	
Gonzalez, Leslie	Meadow Green	4	2	
Goss, Brittany	Rancho Starbuck	5	7	
Guerrero, Rachel	El Portal	5	19	
Gunsalus, Lecia	Jordan	5	15	
Haro-Banuelos, Byanca	Jordan	4	8	
Haworth, Acacia	Olita	3	4	
Hernandez, Javier	Jordan	4	17	
Higgins, Kelly	Macy	5	21	
Huff, Kenneth	Rancho Starbuck	5	22	
Ilinsky, Christina	El Portal	5	23	
Irving, Tamara	Rancho Starbuck	5	26	
Jacobs, Diana	Jordan	5	8	
James, Alexandra	Macy	4	3	
Jan, Sarah	Olita	5	6	
Jauregui, Kristen Joy	Jordan	4	10	
Jeffrey, Kim	El Portal	5	25	
Jimenez, Yovanna	Jordan	4	6	
Krauletz, Judith	Rancho Starbuck	4	6	
Kudler, Laurie	Macy	5	26	
Langer, Garrick	Rancho Starbuck	5	8	
Lauprecht, Robert	Jordan	5	17	
Lee, Sylvia	Macy	4	11	
Liles, Amy	El Portal	5	25	
Lim, Alexandra	Macy	5	6	
Lisowski Martinez, Paula	Meadow Green	5	26	
Mangold, Christian	Macy	5	26	
Mangold, Leslie	Meadow Green	5	26	
Marrone, Frankie	District Office	5	4	
Martinez, Christian	Rancho Starbuck	5	5	
Mayhew, Julie	Rancho Starbuck	5	26	Early Learning TOSA – ELA Rancho (8 Periods)
McCoy, Stacey	Meadow Green	4	3	
McNeff, Michelle	El Portal	5	7	50% (50% Tenured, 50% Leave of Absence – Tenured at 100%).
McTeggart, Amy	Macy	4	26	
Mena, Lydia	Olita	5	8	
Menendez, Maya	Olita	5	8	
Michael-Bohen, Michelle	Olita	5	26	
Milazzo, Angela	Macy	5	25	
Miller, Cameron	Rancho Starbuck	3	9	
Miller, Stefanie	Meadow Green	5	17	
Montes, Emily	Rancho Starbuck	5	13	TOSA – English Teacher/Library/ELD

Montiel, Shaina	Jordan	4	7	
Morrison, Dana	El Portal	5	4	
Morrison, Deanna	Meadow Green	5	26	
Mosqueda, Irma	Jordan	4	9	
Navarro-Diaz, Yolanda	Meadow Green	5	26	
Nunez, Sarah	El Portal	5	16	
Oke, Melissa	Rancho Starbuck	5	14	
Ortiz, Andrea	Meadow Green	5	9	
Ospital, Jeffrey	Rancho Starbuck	5	15	
Pagano, Breanne	Rancho Starbuck	5	11	
Paine, Jennifer	Olita	5	23	
Palmer, Margaret	Olita	5	26	(10% - Wednesdays –LJEA union CTA paid leave)
Peloquin, Karen	Olita	5	26	
Perez, Susannah	Meadow Green	4	19	
Perumean, Stacy	Meadow Green	5	15	
Petersen, Kaycee	Jordan	5	3	
Petrakis, Kerri	Macy	5	24	
Pfaff, Heather	Jordan	4	10	
Pimper, Shelly	Macy	5	26	
Pinney, Marci	El Portal	5	26	
Razo, Becca	El Portal	4	3	
Remme, Laura	El Portal	5	26	
Robertson, Vicki	Meadow Green	5	26	
Rockenback, Dylan	District Office	1	4	
Rodriguez, Brenda	Jordan	5	7	
Rodriguez, Mayra	Meadow Green	5	19	Early Learning TOSA – Meadow Green
Roshan, Rita	Rancho Starbuck	5	25	
Ruddock, Andrew	Rancho Starbuck	4	5	
Russell, Anne	Olita	5	18	LOA
Ryan, Tara	Rancho Starbuck	5	26	
Sachs, Theadora	Rancho Starbuck	5	26	
Saieva, Alyson	Olita	5	24	
Sandoval, Cheri	Olita	5	26	
Selzenoff, Tamara	Macy	5	7	
Shaw, Shannon	Olita	5	3	
Simons, Rebecca	Meadow Green	5	17	
Sllamniku, Tracy	Jordan	5	8	
Sober, Jessica	Macy	4	4	
Stark Padilla, Brooke	Olita	5	24	
Stephenson, Rebecca	Jordan	5	20	20% Temporary Contract
Stevens, Amanda	Olita	1	4	
				80% (80% Tenured, 20% Leave of Absence – Tenured at 100%).
Suzuki, Angela	Jordan	5	20	
Toice, Susan	Meadow Green	5	26	
Tolmasoff, Susan	Meadow Green	5	11	
Ubeda-Kim, Maria	District Office	5	15	SLP salary schedule
Ulloa, Nicole	Jordan	4	17	
Valdez, Michelle	Macy	5	12	
Valenzuela, Xochitl	Rancho Starbuck	5	9	
Van der Lee, Michelle	Meadow Green	5	10	Early Learning TOSA – Macy

Van Diest, Scott	Rancho Starbuck	5	26	
Wallace, Greg	Rancho Starbuck	4	3	
Wartian, Lillian	Meadow Green	5	26	
Wilkins, Melissa	Meadow Green	4	9	
				50% (50% Tenured, 50% Leave of Absence – Tenured at 100%).
Wood, Carrie	El Portal	5	19	Early Learning TOSA – Math Rancho (4 periods)
Yi, Cara	Rancho Starbuck	5	7	
Zilberman, Sarah	Meadow Green	4	7	

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**It is further recommended that individuals listed in Certificated Salaries for 2025-2026 serve as home school teachers, if needed, for the 2025-2026 school year at a rate of \$50.00/hour, not to exceed five hours per week, per student. Mileage will be paid at the IRS Standard Mileage Rate for the 2024-2025 school year.

G. EXTRA DUTY PAY/STIPENDS 2025-2026**

<u>NAME/ EMPLOYEE ID</u>	<u>EFFECTIVE DATE</u>	<u>END DATE</u>	<u>SITE</u>	<u>COMMENTS</u>
McNeff, Michelle	08/11/2025	05/29/2026	EP	To be paid \$300.00 per month, not to exceed \$3000.00, for serving as Intervention Coordinator. To be paid from Site title I Funds.
Morrison, Dana	08/11/2025	05/29/2026	EP	To be paid \$300.00 per month, not to exceed \$3000.00, for serving as Intervention Coordinator. To be paid from Supplemental Funds.
Peloquin, Karen	08/11/2025	05/29/2026	OL	To be paid \$300.00 per month, not to exceed \$3000.00, for serving as Intervention Coordinator. To be paid from Supplemental Funds.
Anderson, Ryan	08/11/2025	05/29/2026	RS	To be paid \$450.00 per month, not to exceed \$4500.00 for assisting the Technology Director as a Technology Lead to Administer and Support District-wide Educational Technology. To Be Paid From General Fund Technology Budget.
Oke, Melissa	01/05/2026	05/29/2026	RS	Share Athletic Director responsibilities for Rancho-Starbuck Junior High School After-School Sports Program. To be paid a total of \$225.00 monthly, not to exceed \$2,250.00. Funds to be paid from Rancho Starbuck Donation Account.
Langer, Garrick	08/11/2025	12/31/2025	RS	Share Athletic Director responsibilities for Rancho-Starbuck Junior High School After-School Sports Program. To be paid a total of \$225.00 monthly, not to exceed \$2,250.00. Funds to be paid from Rancho Starbuck Donation Account.
Blackler, Samantha	08/11/2025	05/29/2026	MA	Speech Language Pathologist Supervision / NTE \$50.00 an hour. To be paid from MediCal resource 56400.
Gatto, Nancy			DO	To be paid \$30.00 per month, not to exceed \$300.00, for mileage stipend. To be paid from General Fund
Castillo, Barbara	08/11/2025	05/29/2026	DO	To be paid \$30.00 per month, not to exceed \$300.00, for mileage stipend. To be paid from General Fund
Champion, Rebecca	08/11/2025	05/29/2026	DO	To be paid \$30.00 per month, not to exceed \$300.00, for mileage stipend. To be paid from General Fund.
Galli, David	08/11/2025	05/29/2026	RS	To be paid \$150.00 monthly, not to exceed \$1,500.00 for serving as the Esports Coordinator. To be paid from the Rancho Starbuck Donation Account.

Gonzalez, Tricia	08/11/2025	05/29/2026	DO	To be paid \$55.00 per month, not to exceed \$550.00, for mileage stipend. To be paid from General Fund.
Heinrich, Kari	08/11/2025	05/29/2026	DO	To be paid \$30.00 per month, not to exceed \$300.00, for mileage stipend. To be paid from General Fund.
CdeBaca, Denise	08/11/2025	05/29/2026	DO	To be paid \$30.00 per month, not to exceed \$300.00, for mileage stipend. To be paid from General Fund.
Igarta, Kaleo	08/11/2025	05/29/2026	DO	To be paid \$30.00 per month, not to exceed \$300.00, for mileage stipend. To be paid from General Fund.
Langer, Garrick	08/11/2025	05/29/2026	RS	To be paid \$150.00 monthly, not to exceed \$1,500.00 for serving as the Esports Coordinator. To be paid from the Rancho Starbuck Donation Account.
Maronne, Frankie	08/11/2025	05/29/2026	DO	To be paid \$30.00 per month, not to exceed \$300.00, for mileage stipend for Elementary School Choral Program. To be paid from General Fund.
Marrone, Frankie	08/11/2025	05/29/2026	RS	To be paid \$300.00 per month, not to exceed \$3000.00 for Arts. Funding ESSER III.
Marrone, Frankie	08/11/2025	05/29/2026	RS	To be paid NTE amount of \$2500.00 for the position of music director, Lowell Joint Youth Theatre at El Portal. To be paid from One time art & music block grand and fund 12 ELOP funding.
Mayhew, Julie	08/11/2025	05/29/2026	RS	To be paid \$500.00 per month, not to exceed \$5,000.00 for serving as an Intervention Coordinator. To be paid \$3,000.00 from Supplemental Funds and \$2,000.00 Rancho Starbuck Site Funds
Miller, Cameron	08/11/2025	05/29/2026	RS	To be paid \$200.00 monthly, not to exceed \$2,000.00 for serving as Yearbook Coordinator. To be paid from the Rancho-Starbuck Yearbook Account
Miller, Cameron	08/11/2025	05/29/2026	RS	To be paid \$300.00 per month, not to exceed \$3000.00 for Arts. Funding ESSER III
Ospital, Jeff	08/11/2025	05/29/2026	RS	To be paid \$150.00 monthly, not to exceed \$1,500.00 for serving as after-school Robotics Team Coordinator. To be paid from the Rancho Starbuck Donation Account.
Pagano, Breanne	08/11/2025	05/29/2026	RS	To be paid \$30.00 per month, not to exceed \$300.00, for mileage stipend for Lowell Joint Youth Theater. To be paid from General Fund.
Pagano, Breanne	08/11/2025	05/29/2026	RS	To be paid \$300.00 per month, not to exceed \$3000.00 for Arts. Funding ESSER III
Pagano, Breana	08/12/2024	05/29/2025	RS	To be paid \$2000.00 per show, NTE \$8000 a total of four shows, for the position of director, Lowell Joint Youth Theatre. To be paid from One time art & music block grand and fund 12 ELOP funding.
Pagano, Breanne	08/11/2025	05/29/2026	RS	To be paid \$1750.00 per show, NTE \$9000 a total of five shows, for the position of director, Lowell Joint Youth Theatre. To be paid from One time art & music block grand and fund 12 ELOP funding.
Rockenbach, Dylan	08/11/2025	05/29/2026	DO	To be paid \$30.00 per month, not to exceed \$300.00, for mileage stipend for Elementary School Band. To be paid from General Fund.
Rockenbach, Dylan	08/11/2025	05/29/2026	DO	To be paid \$300.00 per month, not to exceed \$3000.00 for Arts. Funding ESSER III.
Ruddock, Andrew	08/11/2025	05/29/2026	RS	To be paid \$150.00 monthly, not to exceed \$1,500.00 for serving as after-school Science Olympiad Coordinator. To be paid from the Rancho Starbuck Donation Account.
Van Diest, Scott	08/11/2025	05/29/2026	RS	To be paid \$200.00 monthly, not to exceed \$2,000.00 for serving as Yearbook Coordinator. To be paid from the Rancho-Starbuck Yearbook Account
Rodriguez, Brenda	08/11/2025	05/29/2026	JO	To be paid a Combination (TK/K DLI) Grade Teacher Stipend of \$3000 for the 2025-2026 School Year

Pfaff, Heather	08/11/2025	05/29/2026	JO	To be paid a Combination (1/2) Grade Teacher Stipend of \$3000 for the 2025-2026 School Year
Hernandez, Javier	08/11/2025	05/29/2026	JO	To be paid a Combination (3/4) Grade Teacher Stipend of \$3000 for the 2025-2026 School Year
Lauprecht, Javier	08/11/2025	05/29/2026	JO	To be paid a Combination (5/6) Grade Teacher Stipend of \$3000 for the 2025-2026 School Year
Sturgill, Berea	08/11/2025	05/29/2026	MA	To be paid a Combination (TK/K) Grade Teacher Stipend of \$3000 for the 2025-2026 School Year
Robertson, Vicki	08/11/2025	05/29/2026	MG	To be paid a Combination (1/2) Grade Teacher Stipend of \$3000 for the 2025-2026 School Year
Lower, Corissa	08/11/2025	05/29/2026	OL	To be paid a Combination (TK/K) Grade Teacher Stipend of \$3000 for the 2025-2026 School Year
Sober, Jessica	08/11/2025	05/29/2026	MA	To be paid \$300 a month NTE \$30000.00, for ASB Stipend Macy. To be paid from Site Funds
Wallace, Greg	08/11/2025	05/29/2026	RS	To be paid \$150.00 per month, not to exceed \$1,500.00 for serving as Share Robotics Coordinator. To be paid from Rancho Starbuck Donation Account
Pagano, Breanne	08/11/2025	05/29/2026	RS	To be paid \$150 monthly CTEIG Stipend, not to exceed \$1500, to be paid from fund 1 resource code 6387.
Martinez, Christian	08/11/2025	05/29/2026	RS	To be paid \$150 monthly CTEIG Stipend, not to exceed \$1500, to be paid from fund 1 resource code 6387.
Wallace, Greg	08/11/2025	05/29/2026	RS	To be paid \$150 monthly CTEIG Stipend, not to exceed \$1500, to be paid from fund 1 resource code 6387.
Simmons, Rebecca	08/11/2025	05/29/2026	MG	To be paid \$300.00 per month, not to exceed \$3000.00, for serving as Intervention Coordinator. To be paid from Supplemental Funds.
McCoy, Stacey	08/11/2025	05/29/2026	MG	To be paid \$150.00 per month, not to exceed \$1500.00, for serving as Robotics Coordinator To be paid from Meadow Green Donation Account..

- H. Employment of substitutes effective 07/01/2025 for the 2025-2026 school year @ \$200 per day and \$100.00 per half day rate, \$250.00 long term sub rate, and \$50.00 per hour* (not to exceed six hours) as applicable and to include: professional development, Saturday school, site support duties, Intervention, PowerSource, Power Source Summer Camp, ESY, Lowell Joint Youth Theater, Rancho Starbuck Performing Arts

I. SUBSTITUTE CHANGE OF PAY

<u>NAME/ EMPLOYEE ID</u>	<u>EFFECTIVE DATE</u>	<u>END DATE</u>	<u>SITE</u>	<u>COMMENTS</u>
Fitzgerald, Sydney	08/11/2025	05/29/2026	DO	To be paid long term daily rate of \$250 as dance and movement teacher for the district.
Fitzgerald, Sydney	07/01/2025	06/30/2026	DO	To be paid at the rate of \$50 / hour NTE \$6000 for Theater Instruction for Rancho Starbuck Performing Arts to be paid from Arts/LJSD Foundation Fund.
Fitzgerald, Sydney	07/01/2025	06/30/2026	DO	To be paid at the rate of \$50 / hour NTE \$8000 for Theater Instruction for Lowell Joint Youth Theater at all elementary school sites. To be paid from Arts LJSD Foundation Fund and ELOP Funds
Van Vliet, Ronita	07/01/2025	06/30/2026	DO	To be paid at the hourly rate of \$70.00 Speech Language and Pathologist Services
Montemayor, Kathleen	08/11/2025	05/29/2026	DO	To be paid long term daily rate of \$250 as resident substitute teacher, Three Days a week for the district.
Montemayor, Kathleen	08/11/2025	05/29/2026	DO	To be paid long term daily rate of \$250 as substitute teacher, two days (Tuesdays & Wednesdays) a week as Rancho ATS
Haworth, Gracia	08/11/2025	05/29/2026	DO	To be paid long term daily rate of \$250 as substitute teacher on Wednesdays for Olita TK teacher. To be paid by CTA.

Milton, Lisa	08/11/2025	05/29/2026	DO	To be paid \$250 for intervention sub at El Portal Elementary. To be paid by site Title I funds.
Ruiz, Paola	08/11/2025	05/29/2026	DO	To be paid long term rate of \$250 for long term intervention at Meadow Green elementary. To be paid from site Title I fund.
Kevin Kjer	08/11/2025	05/29/2026	DO	To be paid special long term rate \$250, three days a week, for P.E. Macy program. To be paid from Site Funds.
Milton, Lisa	08/11/2025	05/29/2026	DO	To be paid long term rate of \$250 for long term intervention at El Portal elementary. To be paid from site Title I fund.

Certificated Job Description:

- Expanded Learning Opportunity Coordinator (revised)

II. CLASSIFIED EMPLOYEES June 23, 2025

A. MONTHLY – GENERAL FUND

B. HOURLY – GENERAL FUND

<u>NAME/ EMPLOYEE ID#</u>	<u>EFFECTIVE DATE</u>	<u>END DATE</u>	<u>RANGE/ STEP</u>	<u>SITE</u>	<u>COMMENTS</u>
Alvarez, Michelle	6/2/2025			MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25
Anaya, Arlene	6/2/2025			MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25
Arcega, Aida	6/2/2025			MG	Summer Camp/Power Source Assignment: Office Manager 6/2/25-6/27/25
Belk, Juliette	6/9/2025			DO	Summer Technology: Starting 06/9/25 through completion of projects.
Cardenas, Eva	6/2/2025			MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Castro, Jenny	6/2/2025			MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Cauley, Krisha	6/2/2025			MG	Summer Camp Assignment: Noon Duty Aide 6/2/25-06/27/25
Chavez, Diane Marie	6/2/2025			MG	Summer Camp Assignment: Noon Duty Aide 6/2/25-06/27/25
Contreras, Seth	6/2/2025			MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Corona, Michelle	6/2/2025			MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25
Correa, Jose	6/2/2025			MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Del Orbe, Ruth	6/2/2025			MG	Summer Camp Assignment: Satellite Cafeteria Worker 6/2/25-06/27/25

Ebel, Sarah	6/2/2025	MG	Summer Camp Assignment: PowerSource Site Coordinator 6/2/25-06/27/25
Edwards, Sarah	6/2/2025	MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Flores, Victor	6/2/2025	MG	Summer Camp Assignment: Noon Duty Aide 6/2/25-06/27/25
Fonseca, Casta	6/2/2025	MG	Summer Camp Assignment: Substitute Instructional Aide 6/2/25-06/27/25
Gonzalez, Kayla	6/2/2025	MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Gonzalez, Leslie	6/2/2025	MG	Summer Camp Assignment: Substitute Instructional Aide 6/2/25-06/27/25
Hernandez, Nancy	6/2/2025	MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Heysham, Nancy	6/2/2025	MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25
Hoffman, Tabatha	6/2/2025	MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25
Khan, Mustafa	6/2/2025	MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Leon Guerrero, Robyn	6/9/2025	DO	Summer Technology: Starting 06/9/25 through completion of projects.
Lepe, Caroline	6/2/2025	MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Licea, Erica	6/2/2025	MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25
Linares, Jada	6/2/2025	MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Longo Gomez, Stephanie	6/2/2025	MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25
Lopez, Donna	6/2/2025	MG	Summer Camp Assignment: PowerSource Site Coordinator 6/2/25-06/27/25
Lopez, Jennifer	6/2/2025	MG	Summer Camp Assignment: PowerSource Site Coordinator 6/2/25-06/27/25
Maciel, Yessenia	6/2/2025	MG	Summer Camp Assignment: Noon Duty Aide 6/2/25-06/27/25
Marquez, Francisco	6/2/2025	MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25
Marquez, Francisco	6/2/2025	MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Mejia, Suzanne	6/2/2025	MG	Summer Camp Assignment: PowerSource Site Coordinator 6/2/25-06/27/25
Melendez, George	6/2/2025	MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25
Meza Soto, Katie	6/2/2025	MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25

Mize, Kelly	6/2/2025	MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Mularkey, Elaine	6/2/2025	MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Nordell, Karen	6/2/2025	MG	Summer Camp Assignment: Substitute Instructional Aide 6/2/25-06/27/25
Ornelas, Ivonne	6/2/2025	MG	Summer Camp Assignment: Satellite Cafeteria Worker 6/2/25-06/27/25
Perez, Shari	6/2/2025	MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25
Pullen, Darleene	6/9/2025	DO	Summer Technology: Starting 06/9/25 through completion of projects.
Ramirez, Don	6/2/2025	MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25
Rivas Mora, Rosa	6/2/2025	MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Rivera, Naomi	6/2/2025	MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Rosales, Alexa	6/2/2025	MG	Summer Camp Assignment: Substitute Instructional Aide 6/2/25-06/27/25
Sanchez, Alexandra	6/2/2025	MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Sanford Williams, Carol	6/2/2025	MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25
Sato, Kay	6/2/2025	MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25
Schrainer, Chelsea	6/2/2025	MG	Summer Camp Assignment: Substitute Instructional Aide 6/2/25-06/27/25
Schrainer, Chelsea	6/9/2025	DO	Summer Technology: Starting 06/9/25 through completion of projects.
Schreiber, Mikayla	6/2/2025	MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Serrano, Tena	6/9/2025	DO	Summer Technology: Starting 06/9/25 through completion of projects.
Solis, Wendy	6/2/2025	MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25
Torres, Nicole	6/2/2025	MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Vasquez, Maricela	6/2/2025	MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25
Vega Arroyo, Alexis	6/2/2025	MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Villarino, Jill	6/2/2025	MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25
Villarino, Pilar	6/2/2025	MG	ESY Assignment: Instructional Aide 6/2/25-6/27/25
Wendler, Lucille	6/2/2025	MG	Summer Camp Assignment: Noon Duty Aide 6/2/25-06/27/25

Westerhold, Paul	6/2/2025		MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Ybarra, Mariana	6/2/2025		MG	Summer Camp Assignment: Instructional Aide 6/2/25-06/27/25
Armijo, Jessica	08/01/2025	05/29/26	RS	Share Athletic Director responsibilities for Rancho-Starbuck Junior High School After- School Sports Program. To be paid a total of \$225.00 monthly, not to exceed \$2,250.00. Funds to be paid from Rancho Starbuck Donation Account.

C. CLASSIFIED JOB DESCRIPTIONS

Addition: Accounting Supervisor
Revised: Director of Fiscal Services
Revised: Assistant Director of Fiscal Services



LOWELL JOINT SCHOOL DISTRICT
**COORDINATOR OF EXPANDED LEARNING
OPPORTUNITIES PROGRAM**



DEFINITION

Under the direction of the Assistant Superintendent of Educational Services responsible for the management of the district Expanded Learning Opportunities Program, which include before school, after school, and summer school and summer/seasonal academic day camp programs. Responsible for directing, managing, supervising and coordinating systems, policies and procedures to accelerate and enhance student achievement to support all students with college and career readiness. Directs the early learning and expanded learning employees in the daily operations, as well as administrative aspects of the department.

ESSENTIAL FUNCTIONS/DUTIES:

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the classification.

1. Collaborate with staff and educational partners to develop before school, after school, and summer educational and enrichment programs for students in grades TK-6.
2. Align the implementation of curriculum, instruction, and assessment systems in before school, after school and summer programs with the regular school day and the Expanded Learning Quality Standards.
3. Provide support to school sites to implement the before school, after school and summer programs to meet the needs of all students.
4. Ensure all programming and curricula are aligned to the District's goals, Expanded Learning Opportunity Program, After School Education, and Safety grant guidelines.
5. Collect, examine and use data to develop long and short-range plans in a continuous quality improvement process based on the Expanded Learning Quality Standards.
6. Collaborate with educational partners to coordinate community after school programs.
7. Advise, counsel, and assist instructional, support, and ancillary personnel in problem solving activities to determine solutions to provide supplemental learning opportunities for all students.
8. Control and authorize expenditures in accordance with established limitations.
9. Evaluate, supervise and counsel members of staff to improve employee performance ensuring staff adhere to District, state and federal professional standards.
10. Work with community-based organizations to establish contracts for before school, after school, and summer programming services.
11. Prepare and maintain a variety of reports, records and files related to assigned activities and personnel including attendance reports, annual outcome-based data report, program plan, direct/indirect costs, and in-kind match documentation.
12. Participate in personnel management systems, including the recruitment, selection, retention and separation of personnel.
13. Attend county and state professional learning and conference opportunities regarding Expanded Learning and other topics relevant to this position, and other professional meetings.
14. Work schedule to allow opportunities to meet with students, families, and educational partners during evening hours, up to 6 p.m.
15. Provide leadership and direction for developing, coordinating, and aligning Expanded Learning Opportunities during the school day and in extended learning settings, including before/after school and summer programming.

16. Provide knowledge, guidance, and support to schools in the areas of professional development, programming, and service delivery to reduce incidents of student misbehavior and increase student achievement.
17. Build capacity of staff to provide high-quality programming and professional practices for Expanded Learning Opportunities.
18. Collaborate with school sites and other district departments, i.e., Special Education, English Learner Supports, Student Services, etc., to ensure holistic educational and social-emotional approaches to students and maximize the utility of fiscal and human resources available at the site and District level.
19. Foster and maintain partnerships with outside organizations to provide expanded learning opportunities.
20. Perform related duties as assigned

QUALIFICATION GUIDELINES:

- Valid Administrative Service Credential or certificate of eligibility preferred and Master's Degree required or in process
- Valid California Teaching Credential
- Minimum of 6 years of experience in the field preferred
- Valid Driver's License
- Knowledgeable of and able to implement innovative problem-solving and decision-making models in a collaborative team environment
- Demonstrated experience in the selection and supervision of personnel, implementation of curriculum reform, accountability systems, data-driven decision-making, and professional development
- Outstanding interpersonal skills and the ability to generate enthusiasm and motivate staff
- Exceptional writing and computer skills

SALARY RANGE

Appropriate placement on the Certificated Management Supervisory Salary Schedule

PHYSICAL STANDARDS

The physical and mental demands described below are representative of those that must be met by employees to successfully perform the essential functions of this position. The information is not an exhaustive list of duties performed, additional duties may be assigned. These physical standards are generic in nature and tasks may vary dependent on school site, department area or age group assigned. Reasonable accommodations may be made to enable individuals with differing abilities to perform the essential functions.

PHYSICAL DEMANDS

While performing the duties of this position, the employee is regularly required to sit, stand, walk, and talk or hear. The employee frequently is required to use hands and fingers to handle and operate objects, tools, or controls and reach with hands and arms. The employee is occasionally required to climb or balance, stoop, kneel, or crouch. The employee must occasionally lift, push, pull, carry and/or move objects typically weighing up to 25 pounds. Specific vision abilities required by this position include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.



**Lowell Joint
School District**

A Tradition of Excellence Since 1906

"Home of Scholars and Champions"

LOWELL JOINT SCHOOL DISTRICT

COORDINATOR OF EXPANDED LEARNING OPPORTUNITIES PROGRAM



MENTAL DEMANDS

Required to use written and oral communication skills, read and interpret data, information and documents; analyze and solve problems; observe and interpret situations; learn and apply new information or skills; use math and mathematical reasoning; perform highly detailed work; work on multiple and concurrent tasks; work with frequent interruptions; work under intensive deadlines; interact with District and program personnel, school administrators, managers, staff, vendors, the public, and others encountered in the course of work.

PERIOD OF SERVICE

Work calendar as adopted by the Board of Trustees. 204 days of the year the option of an additional 30 days of service at the position daily rate.



JOB SUMMARY:

Under the direction of the Director of Fiscal Services, plan, organize, direct, manage and evaluate District accounting, budgeting and payroll activities; manage and direct fiscal yearend closing processes; establish and revise accounting and payroll processes and procedures; conduct accounting and budget analysis; and provide complex staff assistance to the Director of Fiscal Services and site/program managers.

ESSENTIAL DUTIES AND RESPONSIBILITIES: include the following. Other duties may be assigned.

- Assist Director of Fiscal Services with planning, organizing and directing the work of the Fiscal Services Department including accounting, budgeting and payroll functions.
- Assist Director of Fiscal Services with managing, training and auditing work of assigned personnel in all budget and financial subsystem applications and ensure that established operational procedures and Local, State and Federal laws are followed.
- Prepare, plan and manage fiscal yearend closing process to assure validity and accuracy of the District's financial data for subsequent preparation of District financial statements.
- Coordinate and implement GASB accounting requirements and assist Director of Fiscal Services in preparing Government-Wide consolidated financial statements.
- Direct and oversee regular reconciliation of all District funds, including all balance sheet and income statement accounts.
- Assist in conducting audits of District funds and accounts, prepare yearend financial data for annual audit, prepare audit schedules for external auditors. Provide training to schools and departments on audit findings and internal controls.
- Review all funds received and deposited in the Orange County Treasury for accuracy.
- Prepare financial/budget analysis and reports as required or requested.
- Manage and maintain financial accountability of categorical programs and verify accuracy of financial data. Direct staff in coordinated effort with program directors to prepare accurate financial reports to Local, State and Federal Grantors.
- Assist Director of Fiscal Services in preparation of District annual and interim budgets, including data for projections of revenue and expenditures by programs and funds. Consult and coordinate with site/program administrators on their site allocation on a regular basis.
- Ensure that all tax reports, retirement reports and other reports required by Local, State or Federal agencies are prepared and submitted in a timely fashion.
- Participates in the selection and appointment of personnel, provide or coordinate staff training, work with employees to correct deficiencies, implement discipline procedures, recommend employee terminations.
- Advise administrators, school site staff and District staff regarding various fiscal policies and procedures, financial/budget system utilization, and other financial and budget related issues on a regular basis.
- Direct, oversee and participate in the development of the office work plan, assign work activities, projects and programs, monitor work flow, develop and implement policies and procedures, review and evaluate systems, methods and procedures.
- Recommend goals and objectives, monitor and review existing and proposed legislation related to school finance. Analyze and implement new California Department of Education (CDE) Standardized Account Code Structure (SACS) changes effecting school administration.

- In the absence of the Director of Fiscal Services, has responsibility for coordination and general direction of other Business Division operations (as may be assigned).
- Assist in evaluating department services to determine efficiency and effectiveness in meeting goals and objectives.
- Attend conferences and meetings for the purpose of maintaining professional knowledge, and to represent the District.
- Other duties as assigned

QUALIFICATION GUIDELINES:

Knowledge of:

- Principles and practices of accounting, payroll, budgeting and financial management.
- Auditing and fixed asset control procedures.
- Principles and practices of management, administration, supervision and training.
- Financial and budget analysis and research procedures.
- Legal and procedural requirements in public school district financial work including California State Accounting Manual and program accounting.
- Automated computer systems, databases for business applications.

Ability to:

- Manage accounting, payroll and budgeting functions.
- Prepare clear and concise financial/budget reports and statements.
- Perform complex financial analysis and research.
- Manage, supervise and train employees in accounting, budgeting and payroll operations.
- Establish and maintain cooperative and effective working relationships with others.
- Communicate effectively in written and oral form.
- Delegate responsibility.
- Meet schedules and timelines

EDUCATION AND EXPERIENCE:

High school diploma or its equivalent. Graduation from a recognized four-year college or university with a major in accounting, finance, business administration, or a closely related field preferred or any combination of professional training or experience equivalent to four years of financial recordkeeping, accounting or budgeting experience is required. Four years of increasingly responsible professional accounting experience, including two years of management and supervisory experience is preferred.

QUALIFICATION REQUIREMENTS:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.



PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Dexterity of hands and fingers to operate a computer keyboard.
- Bending the waist, kneeling or crouching to file and retrieve materials.
- Hearing and speaking to exchange information.
- Sitting for extended periods of time
- Frequently use specific vision abilities including close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.
- Lifting, carrying, pushing, or pulling objects up to 10 pounds.
- Extended periods of time walking or standing.
- Extended periods of time working on keyboard and viewing computer monitor(s).

WORK ENVIRONMENT:

Indoor office environment. The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually moderate.

WORK PERIOD:

12 months per year, up to 5 days per week, up to 8 hours per day



LOWELL JOINT SCHOOL DISTRICT ACCOUNTING SUPERVISOR



JOB SUMMARY:

Under the direction of the Director of Fiscal Services or designee, supervise, and manage accounting processes and procedures, assist with budgeting; support and assist with fiscal year-end closing process; conduct accounting and budget analysis; and provide assistance and support to the Director of Fiscal Services, Assistant Director of Fiscal Services, and site/program managers.

ESSENTIAL DUTIES AND RESPONSIBILITIES: include the following. Other duties may be assigned.

- Assist with planning, organizing and directing the work of the Fiscal Services Department including accounting, payroll, and budgeting.
- Supervise, train and audit work of assigned personnel and ensure that established operational procedures and Local, State and Federal laws are followed.
- Assist with fiscal year-end closing process to assure validity and accuracy of the District's financial data for subsequent preparation of District financial statements.
- Assist with regular reconciliation of all District funds, including all balance sheet and income statement accounts.
- Assist with coordination of external auditor visits to prepare and provide interim and year-end financial data for the District annual audit as needed.
- Review and approve JE transfers of all funds/revenue received and deposited in the Orange County Treasury.
- Assist with preparation of financial/budget analysis and reports as required or requested.
- Oversee centralized reconciliation and reporting of student body fund accounting for school sites and external auditors.
- Support the preparation of various State, Federal and Local agency reports as needed.
- Support the requirements of categorical programs.
- Assist Director and Assistant Director of Fiscal Services in preparation of District and interim budgets.
- Assist with management and oversight of inventory/asset system.
- Assist the Director and Assistant Director of Fiscal Services with interviews and employee selection.
- Serve as a technical resource for District and school site staff regarding fiscal procedures.
- Assist in coordinating accounting activities to meet established timelines.
- Ensure that all tax reports, retirement reports and other reports required by Local, State or Federal agencies are prepared and submitted in a timely fashion.
- Participates in the selection and appointment of personnel, provide or coordinate staff training, work with employees to correct deficiencies.
- Attend conferences and meetings for the purpose of maintaining professional knowledge, and to represent the District.

QUALIFICATION GUIDELINES:

Knowledge of:

- Principles and practices of accounting, payroll, budgeting and financial management.
- Auditing and fixed asset control procedures.
- Effective supervision and professional learning.
- Financial and budget analysis and research procedures.

- Legal and procedural requirements in public school district financial work including California State Accounting Manual and program accounting.
- Computer systems and software for business applications.

Ability to:

- Manage accounting and budgeting functions.
- Prepare clear and concise financial/budget reports and statements.
- Perform complex financial analysis and research.
- Manage, supervise and train employees in accounting and budgeting operations.
- Establish and maintain cooperative and effective working relationships with others.
- Communicate effectively in written and oral form.

EDUCATION AND EXPERIENCE:

High school diploma or its equivalent. Graduation from a recognized four-year college or university with a major in accounting, finance, business administration, or a closely related field preferred. Three years of advanced financial recordkeeping, accounting or budgeting experience is required. Knowledge of financial record keeping, accounting principles, and computer based budgeting systems is required.

QUALIFICATION REQUIREMENTS:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Dexterity of hands and fingers to operate a computer keyboard.
- Bending the waist, kneeling or crouching to file and retrieve materials.
- Hearing and speaking to exchange information.
- Sitting for extended periods of time
- Frequently use specific vision abilities including close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.
- Lifting, carrying, pushing, or pulling objects up to 10 pounds.
- Extended periods of time walking or standing.
- Extended periods of time working on keyboard and viewing computer monitor(s).

WORK ENVIRONMENT:

Indoor office environment. The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually moderate.

WORK PERIOD:

12 months per year, up to 5 days per week, up to 8 hours per day



LOWELL JOINT SCHOOL DISTRICT DIRECTOR OF FISCAL SERVICES



JOB SUMMARY:

Under general direction of the Assistant Superintendent of Business Services, the Director of Fiscal Services provides dynamic, responsive, and forward thinking vision in fiscal services; collaborates with other departments to maintain fiscal stability of the District; provides leadership in directing, planning, developing, and managing district finances to maintain financial integrity and to meet the mission and goals of the District; this includes directing, reviewing, revising and organizing all District accounting, payroll and financial record keeping activities; and preparing, developing, monitoring, and revising the annual budget.

ESSENTIAL DUTIES AND RESPONSIBILITIES: include the following. Other duties may be assigned.

- Plan, organize and direct the work of the Fiscal Services Department including accounting, budgeting and payroll functions.
- Manage, train and audit work of assigned personnel in all budget and financial subsystem applications and ensure that established operational procedures and Local, State and Federal laws are followed.
- Communicates regularly with the Assistant Superintendent of Business Services on all fiscal matters.
- Prepare, plan and manage fiscal yearend closing process to assure validity and accuracy of the District's financial data for subsequent preparation of District financial statements.
- Review all funds received and deposited in the Orange County Treasury for accuracy and validity.
- Coordinate and implement GASB accounting requirements in preparing Government-Wide consolidated financial statements.
- Provides administrative direction for the budget and accounting functions of the District.
- Oversee audits of District funds and accounts, prepare yearend financial data for annual audit, prepare audit schedules for external auditors. Provide training to schools and departments on audit findings and internal controls.
- Works collaboratively with Human Resources and Information Technology Services to monitor position control and other fiscal-related systems and functions
- Conducts financial projections and analysis of District revenue and expenditures including multiyear analysis and multi-funded cash flow analysis for facility projects.
- Prepares financial projections and impact analysis for District negotiations with employee bargaining groups.
- Prepares, develops, monitors and revises the District budget.
- Participates in maintaining the District's financial integrity by implementing sound fiscal plans, internal control systems, audit activities, and system conversion and integration.
- Plans, organizes and controls the budget development and monitoring process.
- Plans and directs the District's internal and external audit processes.
- Communicates regularly with Principals and Leadership Team members on site and program fiscal management.
- Prepares, develops and presents annual budget training guidelines to District wide site level personnel.
- Develops improvements to accounting, payroll and purchasing systems.

- Directs personnel in payroll preparation, accounts payable, accounts receivable, attendance accounting, and purchasing.
- Recommend appointment of personnel, provide or coordinate staff training, work with employees to correct deficiencies, implement discipline procedures, recommend employee terminations.
- Establishes accounting procedures for property and equipment inventories.
- Directs the compilation and reporting of information for the District's Tax and Revenue Anticipation Notes and related cash flow analysis.
- Assists in planning, assembling, and presenting data for advisory groups.
- Recommend goals and objectives, monitor and review existing and proposed legislation related to school finance. Analyze and implement new California Department of Education (CDE) Standardized Account Code Structure (SACS) changes effecting school administration.
- Reviews all financial reports required by county, state and federal regulations before submission to agencies.
- Provides oversight for mandated costs.
- Attend conferences and meetings for the purpose of maintaining professional knowledge, and to represent the District.
- Other duties as assigned.

QUALIFICATION GUIDELINES:

Knowledge of:

- Principles and practices of accounting, payroll, budgeting and financial management.
- Auditing and fixed asset control procedures.
- Principles and practices of management, administration, supervision and training.
- Financial and budget analysis and research procedures.
- Legal and procedural requirements in public school district financial work including California State Accounting Manual and program accounting.
- Automated computer systems, databases for business applications.

Ability to:

- Plan, organize and administer the operations and activities of the Fiscal Service department.
- Administer budget and financial controls.
- Prepare clear and concise financial/budget reports and statements.
- Manage, supervise, train and evaluate Fiscal Services staff.
- Perform complex financial analysis and research
- Analyze and interpret data.
- Analyze, interpret and administer laws and regulations relating to a school district.
- Analyze and prepare financial statements and reports.
- Communicate effectively in written and oral form.
- Plan and coordinate inter-departmental activities.
- Implement general policy decisions into effective plans of action.
- Follow oral and written instructions.
- Establish and maintain effective working relationships with others.
- Delegate responsibility.
- Meet schedules and timelines.
- Prepare, develop and present relevant training materials.



EDUCATION AND EXPERIENCE:

Bachelor's Degree in accounting or similar field; or any combination of professional training or experience equivalent to four years in financial analysis, or in fields directly related to position requirements. Four years of progressively responsible administrative, supervisory or staff experience involved in the areas of accounting, payroll and purchasing; interpretation of policies and installation of procedures.

QUALIFICATION REQUIREMENTS:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

REASONING ABILITY:

Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems involving several concrete and abstract variables in standardized situations.

PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Dexterity of hands and fingers to operate a computer keyboard.
- Bending the waist, kneeling or crouching to file and retrieve materials.
- Hearing and speaking to exchange information.
- Sitting for extended periods of time
- Frequently use specific vision abilities including close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.
- Lifting, carrying, pushing, or pulling objects up to 10 pounds.
- Extended periods of time walking or standing.
- Extended periods of time working on keyboard and viewing computer monitor(s).

WORK ENVIRONMENT:

Indoor office environment. The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually moderate.

WORK PERIOD:

12 months per year, up to 5 days per week, up to 8 hours per day

LOWELL JOINT SCHOOL DISTRICT

2023/24 CLASSIFIED MANAGEMENT SALARY SCHEDULE

Effective July 1, 2023, employees shall receive an 11.00% increase to base salary earnings (excluding stipends and other remuneration).

MANAGEMENT POSITIONS	RANGE 1	RANGE 2	RANGE 3	RANGE 4	RANGE 5	RANGE 6	RANGE 7	RANGE 8
Assistant Superintendent of Business Services	15,306	16,113	16,960	17,808	18,698	19,633	20,614	21,644
Assistant Superintendent of Administrative Services	15,306	16,113	16,960	17,808	18,698	19,633	20,614	21,644
Director of Educational & Information Technology	13,720	13,933	14,145	14,357	14,570	14,781	14,995	15,213
Director of Fiscal Services	13,720	13,933	14,145	14,357	14,570	14,781	14,995	15,213
Assistant Director of Fiscal Services	10,976	11,147	11,316	11,486	11,656	11,825	11,996	12,596
Bond Contracts and Accounting Compliance Manager	7,477	7,776	8,069	8,407	8,760	9,128	9,502	9,885
Coordinator of Early Childhood Program	10,828	11,032	11,218	11,402	11,607	11,792	11,997	12,597
Occupational Therapist (11 months)	7,685	8,067	8,473	8,898	9,342	9,810	10,300	10,815
Supervisor Positions								
Network and Data Systems Technology Supervisor	6,227	6,591	6,976	7,385	7,817	8,274	8,858	9,271
Maintenance & Operations Supervisor	5,661	5,993	6,344	6,716	7,108	7,525	7,965	8,364
Accounting Supervisor	5,661	5,993	6,344	6,716	7,108	7,525	7,965	8,364
Nutrition Services Supervisor	5,146	5,403	5,673	5,957	6,255	6,568	6,896	7,242
Site Supervisor Teacher - Preschool	4,380	4,600	4,830	5,069	5,325	5,590	5,869	6,163

Twelve-month Classified Management employees receive 22 days vacation per year.

LONGEVITY

Length of service shall be additionally compensated at the following rate, after completion of:

5 Years	\$4,000
10 Years	\$5,000
15 Years	\$6,000
20 Years	\$7,000



LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Resolution 2025/26 No. 979 Making Findings
Under the Government Code 4217.12, in for
Furtherance of Utilization of CalShape Funds for
Improvements of Ventilation Systems District
Wide

PUBLIC HEARING
ACTION/
(RESOLUTION)

The California Schools Healthy Air, Plumbing, and Efficiency Program (CalSHAPE) provides funding to upgrade heating, air conditioning, and ventilation (HVAC) systems in public schools and replace non compliant plumbing fixtures and appliances that fail to meet water efficiency standards.

CalSHAPE Ventilation prioritizes investments in facilities in underserved communities and near freeways or industrial facilities.

The program provides funding to local educational agencies for the reasonable costs of HVAC assessment, general maintenance and adjustment, filter replacement, and carbon dioxide monitor installation, including certain repairs, replacements, and other improvements to HVAC systems.

We will be working with LifeWings & KFI Engineers to complete assessments, and change out filters and CO2 monitors when determined necessary on all of our HVAC units. We will also work with them to apply for further grants if assessments determine that any are in need of replacement.

Currently, we are eligible for \$444,720.00 to complete assessments on all units and change out any filters or CO2 monitors. If any units are identified as needing to be replaced, we will be applying for separate funds at a later time.

The grant time period to complete work and receive the funds is 24 months.

It is recommended that Resolution 2025/26 No. 979, making findings under the government code 4217.12, in for furtherance of utilization of CalShape funds for improvements of ventilation systems district wide, be adopted, and that the Superintendent or designee be authorized to execute the necessary documents.

Superintendent's Comment:

ADOPTION BY MAJORITY ROLL CALL VOTE.

LOWELL JOINT SCHOOL DISTRICT

RESOLUTION 2025-2026 NO. 979

**RESOLUTION OF THE BOARD OF TRUSTEES OF THE
LOWELL JOINT SCHOOL DISTRICT
OF LOS ANGELES AND ORANGE COUNTIES, CALIFORNIA,
MAKING FINDINGS UNDER THE GOVERNMENT CODE 4217.12, IN
FURTHERANCE OF UTILIZATION OF CALSHAPE FUNDS
FOR IMPROVEMENTS OF VENTILATION SYSTEMS DISTRICT WIDE**

WHEREAS, the Lowell Joint School District (“District”) owns and controls various school sites, which the District desires to contract with **ACCO Engineered Systems** to provide improvements to systems that will reduce energy usage and will reduce operating and maintenance costs.

WHEREAS, California Government Code Section 4217.12 *et seq.* authorizes public agencies to contract for energy services if its governing body determines, after holding a regularly scheduled public hearing, public notice of which is given at least two weeks in advance, that the anticipated cost to the District for the energy services contract will be less than the anticipated marginal cost to the District of electrical, gas, and other thermal savings that would have been consumed by the District in the absence of the energy services contract; and

WHEREAS, in accordance with Government Code section 4217.12, on July 21, 2025, the District published a notice of a public hearing at which the District’s Board would consider the CalSHAPE project; and

WHEREAS, in accordance with California Government Code section 4217.12 *et seq.*, based on the water and energy cost savings to be generated by the proposed project, the cost of the energy purchases contemplated will be less than the anticipated cost to the District of water and electrical energy that would have been expended by the District if such project were not completed; and

WHEREAS, the total project cost under the proposed agreement with **ACCO Engineered Systems** is expected to be up to **\$189,008. to the extent that nearly 100%** of the project is funded by CalSHAPE grants.

WHEREAS, if all sites are funded by CalSHAPE, estimated annual electrical, gas and other thermal savings more than **\$9,630 annually.**

NOW, THEREFORE, the Board of Trustees of Lowell Joint School District does hereby resolve, determine and order as follows:

Section 1. Recitals. The Board hereby finds and determines that all of the recitals set forth above are true and correct.

Section 2. Government Code Findings. This Resolution is adopted following a meeting at which a public hearing was held at a regularly scheduled meeting of the Board for which a minimum of

two weeks' public notice was duly given. The Board hereby finds that, pursuant to Government Code section 4217.12, the anticipated cost to the District for electrical, thermal and energy services to be purchased by the District will be less than the anticipated marginal cost to the District of electrical energy that would have been consumed by the District absent the project.

Section 3. Approval of Agreement. Based on the findings herein, the Board hereby authorizes the Superintendent or designee to execute the proposed Agreement.

Section 4. Custodian of Records. The administrative records for related plumbing systems and this Agreement are maintained at the District Office located at 11019 Valley Home Ave. Whittier, CA 90603-3042. The custodian of records is the Jessica Fernandes, grant coordinator.

ADOPTED, SIGNED and APPROVED this 4th day of August 2025.

LOWELL JOINT SCHOOL DISTRICT

By: _____

Anthony A. Zegarra
President of the Board of Trustees of the
Lowell Joint School District

ATTEST:

By: _____

Regina L. Woods
Clerk of the Board of Trustees of the
Lowell Joint School District

STATE OF CALIFORNIA)

) ss.

COUNTY OF ORANGE)

I, Regina L. Woods, Clerk of the Board of Trustees of the Lowell Joint School District, do hereby certify that the foregoing resolution was duly adopted by the Board of Trustees of the Lowell Joint School District at a meeting thereof held on the 4th day of August, 2025 at which meeting a quorum of such Board was present and acting throughout and for which notice and an agenda was prepared and posted as required by law, and that such Resolution 2025-2026 No. 979 was so adopted by the following vote:

AYES:

NAYS:

ABSTAIN:

ABSENT:

By: _____
Regina L. Woods, Clerk of the Board of Trustees
Lowell Joint School District

STATE OF CALIFORNIA)
) ss.
COUNTY OF ORANGE)

I, Regina L. Woods, Clerk of the Board of Trustees of the Lowell Joint School District, do hereby certify that the foregoing resolution is a full, true, and correct copy of Resolution 2025-2026 No. 979 of such Board and that the same has not been amended or appealed.

Regina L. Woods, Clerk of the Board of Trustees
Lowell Joint School District

NOTICE OF PUBLIC HEARING

Lowell Joint School District

[Government Code section 4217.12]

Ventilation Services Contract

NOTICE IS HEREBY GIVEN of the intention of the Board of Trustees of the **Lowell Joint School District** (“District”) to consider entering a Ventilation Services contract (“Agreement”) with **ACCO Engineered Systems**, pursuant to the terms of Government Code section 4217.12. The total project cost under the proposed agreement is expected to be up to **\$189,008**, to the extent that nearly 100% of the project is funded by CalSHAPE grants. In accordance with California Government Code section 4217.12 *et seq.*, based on the energy cost savings to be generated by the proposed project, the cost of the energy purchases contemplated will be less than the anticipated cost to the District of electrical energy that would have been expended by the District if such project were not completed. Electrical, gas and other thermal savings are estimated to be approximately **\$9,630.00 annually**.

The time for the public hearing on the intention of the Board to consider entering into the Agreement is **August 4, 2025, at 7:30 p.m.** or as soon thereafter as practicable, during the Board’s regular meeting. Further information on attending the meeting, and directions on submitting comments to the Board can be found on the District website: www.ljsd.org

At such time the testimony of all interested persons for or against the proposed Agreement will be heard. Any protest pertaining to the regularity or sufficiency of the proceedings shall be in writing and shall clearly set forth the irregularities and defects to which the objection is made. Any written protest shall be filed with the Clerk of the District on or before the time set for the hearing. The District may waive any irregularities in the form or content of any written notice and at the hearing may correct minor defects in the proceedings. Written protests may be withdrawn, in writing, at any time before the conclusion of the hearing.

6/18/2025

Rev04

Jessica Fernandes
Lowel Joint School District
11019 Valley Home Ave,
Whittier, CA 90603

Subject: Lowel Joint – CalSHAPE CO2 and Filters

Dear Jessica Fernandes,

ACCO Engineered Systems is pleased to present our proposal to perform the CalSHAPE CO2 Installation and Filter replacement. All work will be compliant with CalSHAPE standards and we will work closely with the assessment team and LifeWings to complete this project.

Scope of Work (Summarized from CalSHAPE Requirements)

- Install new Pelican TC3 thermostats to satisfy the CO2 requirements.
- Connect thermostats to existing units and re-use existing thermostat mount and wiring.
- Install Gateway and up to (5) Repeaters per school.
- Replace filters with MERV13 filters for all units listed in the CalSHAPE filter scope.

Notes:

1. Bond included

Please note that ACCO Engineered Systems' pricing, as indicated, remains valid for a span of 60 days from the issuance date of this letter.

Project Manager
Doug Stevenson III, P.E.
(562) 217-1437
dstevenson@accoes.com

Pelican Pricing

School Site	Room Count	Cost Per Pelican @ \$1,026/TC3	CalSHAPE CO2 Funding	Contingency Dollars Available for Controls	Contingency Funds surplus for repairs
Jordan Elementary	28	\$28,728	\$16,200.00	\$14,165.00	\$1,637
Macy Elementary	26	\$26,676	\$15,600.00	\$14,320.00	\$3,244
Meadow Green Elementary	25	\$25,650	\$16,800.00	\$15,405.00	\$6,555
Olita Elementary	27	\$27,702	\$16,800.00	\$14,990.00	\$4,088
TOTAL	106	\$108,756	\$65,400.00	\$58,880.00	\$15,524

Filter Pricing

School Site	Filters	CalSHAPE Funding
Jordan Elementary	115	\$8,625.00
Macy Elementary	120	\$9,000.00
Meadow Green Elementary	123	\$9,225.00
Olita Elementary	122	\$9,150.00
TOTAL	480	\$36,000.00

Additional Pelican

School Site	Additional Spaces	Additional Costs beyond CalSHAPE
Jordan Elementary	7	\$7,182
Macy Elementary	7	\$7,182
Meadow Green Elementary	7	\$7,182
Olita Elementary	7	\$7,182
TOTAL	28	\$28,728

Total Project Price: \$189,008

Terms and Conditions:

1. **The below terms and conditions are ACCO's standard agreement terms. If there are any that do not comply with the Districts requirements we will determine if it can be adjusted.**
2. Seller agrees to maintain in full force and effect a Workmen's Compensation Insurance policy and a Comprehensive Liability Insurance policy in accordance with this agreement, furnishing certificates of insurance, if required by Buyer.
3. Buyer shall prepare the premises to permit free movement and erection of materials, providing necessary openings, supports, cutting, patching, steam services, and pay all fees in accordance with codes and ordinances unless otherwise indicated in this agreement.
4. In the event that the Seller encounters any asbestos product or Hazardous material in the course of performing its work, the Seller shall have the work abated, encapsulated or removed and/or it is determined that no hazard exists; further, Seller shall receive an extension of time for compensation for delays encountered and compensation for any change in the sequence of method or its work occasioned as a consequence of "Hazardous Material" are substances or chemicals that pose a health hazard, a physical hazard, or harm to the environment and defined and regulated by the Agency (EPA), U.S. Occupational Safety and Health Administration (OSHA), U.S. Department of Transportation (DOT), and U.S. Nuclear Regulatory Commission.
5. The seller shall not be liable for any consequential damages including, but not limited to, liquidated damages, loss of rent, interest expense, etc. damage of any kind, nature, or description. It is expressly understood and agreed that the only liability of Seller is to replace defective workmanship set forth.
6. This agreement shall not be binding until duly accepted by Seller. This agreement constitutes the entire agreement between the parties and supersedes all other agreements, written or oral, with respect to the labor and equipment covered hereby and may not be amended or modified except in writing executed by both parties. Under no circumstances shall the liability of Seller arising out of the sale or erection of the equipment hereunder, or arising out of its use, whether or not the equipment is damaged, in any case exceed the lesser of the following: (a) Cost of correcting defects in the equipment or workmanship; or (b) the difference in value between the cost of the original installation thereof, if installed strictly as in the contract documents set forth. And in no event should any claims be set forth for consequential damages.
7. The Seller shall not be bound by any plan(s) and specification(s) or condition(s), existing or otherwise, that has not been incorporated into this agreement attached to this agreement, nor shall the Seller be bound by any city ordinances, State laws or other governmental regulations not in effect at the time which had become obsolete and which no longer was enforced by such public body enacting the same.
8. Seller shall be excused for any delay in completion of this agreement caused by acts of God, including but not limited to, wind, rain, flood, storm, earthquake; pandemic; acts of neglect of owner or architect or by any employee or agent of either; acts of neglect of separate contractors employing utilities or governmental or public bodies or their agents; material shortages; labor trouble, labor slowdowns; strikes; union activity causing a real casualty; delay in transportation; changes ordered in the work; failure of Buyer to make payments to Seller as required under this agreement, or any other act beyond the reasonable control of Seller, any of which shall automatically entitle Seller to reasonable or necessary extensions of the completion date of the agreement and the adjustment of the agreement price to compensate Seller for all costs and expenses of additional labor, service, equipment or material and extend such delay.
9. If any of the materials specified are not readily available, the Seller may substitute equally efficient materials or fixtures of generally similar character to the materials or fixtures specified, and it shall allow any differential between the original cost of the materials specified and the materials furnished.
10. The seller may suspend further performance under this Bid Contract upon three (3) days written notice to the Buyer in the event the Buyer is in breach other than non-payment. Notice need not be given if work is suspended due to non-payment or due to the failure of the Buyer to pay for work herein. In the event Seller elects to suspend performance, Seller shall be entitled to remobilization costs, including profit and overhead, upon the resumption of work or issuing proper change orders for extra work. Such costs will equal actual losses sustained by Seller in terminating and restarting work.
11. This agreement is entered into upon the understanding that in the prosecution of any work herein specified Seller will be allowed sufficient time on the basis of a normal eight-hour day, and in the event that Buyer or any subcontractor require Seller to perform such labor on an overtime basis of every kind and character as Seller may be required to incur on account of said overtime labor, shall constitute an additional charge herein.
12. Seller expressly reserves the right to assign all or any portion of its rights and/or duties under this Bid Contract with or without notice to the Buyer.
13. In the event of a conflict between the terms and conditions of this agreement and terms and conditions stated in plans and/or specifications attached to this agreement, the terms of this agreement shall govern.
14. If, in Seller's reasonable opinion, Buyer's credit becomes impaired, Seller may, at its option, suspend work and deliveries under this agreement until such time as Buyer has made payment and provided acceptable security for future payment of uncompleted work under this agreement. If Buyer fails or refuses to make such payment, then Seller shall have the right to terminate this agreement. Until such time as Buyer has made payment and provided acceptable security, suspension of the work under this agreement resulting therefrom shall extend the time of performance of Seller under this agreement. If legal action is required to collect any sums due hereunder, Seller shall be entitled to reasonable attorney fees in addition to all other damages found to be due hereunder.

**California Schools Healthy Air, Plumbing, and Efficiency Program
Governing Body Resolution**

RESOLUTION NO. 913

Resolution of

Lowell Joint School District

Name of Local Educational Agency

WHEREAS, the California Energy Commission's California Schools Healthy Air, Plumbing, and Efficiency (CalSHAPE) Program provides grants to local educational agencies (LEA), that includes school districts, charter schools, and regional occupational programs, to fund the assessment, maintenance, and repair of ventilation systems, installation of carbon dioxide monitors, and replacement of noncompliant plumbing fixtures and appliances;

NOW THEREFORE, BE IT RESOLVED, that Board of Trustees of Lowell Joint

Governing Body

authorizes Lowell Joint School District to apply for a

LEA Name

grant from the California Energy Commission to implement a CalSHAPE Program project.

BE IT ALSO RESOLVED, that in compliance with the California Environmental Quality Act (CEQA), Board of Trustees of Lowell Joint School District finds that the activity funded by

Governing Body

the grant is (Please select one)

☒ not a project because the work involves equipment assessments only, routine maintenance, filters & CO2 monitors
and does not involve construction, alterations, moving walls, or disturbing the ground in any way.

OR

☐ a project that is exempt under _____ because

OR

☐ a project and _____ document was prepared.

BE IT ALSO RESOLVED, that if recommended for funding by the California Energy Commission, the Board of Trustees of Lowell Joint authorizes Lowell Joint School District

Governing Body

LEA Name

to accept a grant up to \$ 444,720.00 and accept all grant agreement

Grant Amount Requested

terms and conditions.

BE IT FURTHER RESOLVED, that Jim Coombs, Superintendent of Schools
Name of Designated LEA Official or Staff

David Bennett, Asst Superintendent Business Serv. and Jessica Fernandes, Grant Coordinator,
Name of Designated LEA Official or Staff *Name of Designated LEA Official or Staff*
are hereby authorized and empowered to execute in the name of

Lowell Joint School District all necessary documents to implement and
LEA Name

carry out the purpose of this resolution, and to undertake all actions necessary to
undertake and complete the energy efficiency projects.

Passed, Approved and Adopted this 8th day of January 2024
Month Year

Governing Body Representatives:

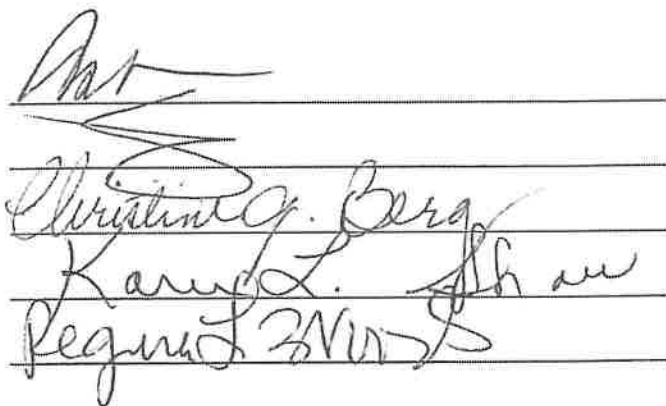
Anastasia M. Shackelford

Anthony A. Zegarra

Christine J. Berg

Karen L. Shaw

Regina L. Woods


The block contains four handwritten signatures on lined paper. The first signature is a stylized 'A' for Anastasia M. Shackelford. The second signature is 'Christine J. Berg'. The third signature is 'Karen L. Shaw'. The fourth signature is 'Regina L. Woods'.



RECIPIENT Lowell Joint	AGREEMENT NUMBER 23R5VA1095
ADDRESS Jessica Fernandes 11019 Valley Home Avenue Whittier, CA 90603	AGREEMENT TERM Ends 24 months after Effective Date The effective date of this Agreement is either the start date or the approval signature date by the California Energy Commission representative below, whichever is later. The California Energy Commission shall be the last party to sign. No work is authorized, nor shall any work begin, until on or after the effective date.

PROJECT DESCRIPTION

The parties agree to comply with the terms and conditions of the following Exhibits which are by this reference made a part of the agreement.

- Exhibit A – Scope of Work**
- Exhibit B – Budget**
- Exhibit C – Agreement Contacts**
- Exhibit D – Terms and Conditions**

REIMBURSABLE AMOUNT

\$444,720.00

Total of REIMBURSABLE AMOUNT

\$444,720.00

The undersigned parties have read the attachments to this agreement and will comply with the standards and requirements contained therein.

CALIFORNIA ENERGY COMMISSION		RECIPIENT	
AUTHORIZED SIGNATURE	DATE	AUTHORIZED SIGNATURE	DATE
			7/8/24
NAME Adrienne Winuk		NAME Jim Coombs	
TITLE Contracts, Grants, and Loans Office Manager		TITLE Superintendent	
CALIFORNIA ENERGY COMMISSION ADDRESS 1516 9th Street, MS 18, Sacramento, CA 95814			

EXHIBIT A
Scope of Work

Lowell Joint 3064766000000

Total Number of Sites 5

Site Name

El Portal Elementary
Meadow Green Elementary
Olita Elementary
Jordan Elementary
Macy Elementary

CDS Code

30647666020127
30647666020192
30647666020200
30647666020150
30647666020176

El Portal Elementary

Category

Assessment & Maintenance
Filter
Monitor

Unit Count

41
120
27

Meadow Green Elementary

Category

Assessment & Maintenance
Filter
Monitor

Unit Count

41
123
28

Olita Elementary

Category

Assessment & Maintenance
Filter
Monitor

Unit Count

39
122
28

Jordan Elementary

Category

Assessment & Maintenance
Filter
Monitor

Unit Count

36
115
27

Macy Elementary

Category

Assessment & Maintenance
Filter
Monitor

Unit Count

37
120
26

**EXHIBIT B
Budget**

Lowell Joint 30647660000000

**Total Requested Amount
\$444,720.00**

Site Name

Requested Amount

El Portal Elementary	\$91,440.00
Meadow Green Elementary	\$92,430.00
Olita Elementary	\$89,940.00
Jordan Elementary	\$84,990.00
Macy Elementary	\$85,920.00

El Portal Elementary

Category

Requested Amount

Assessment & Maintenance	\$51,000.00
Filter	\$9,000.00
Monitor	\$16,200.00
Contingency	\$15,240.00

Meadow Green Elementary

Category

Requested Amount

Assessment & Maintenance	\$51,000.00
Filter	\$9,225.00
Monitor	\$16,800.00
Contingency	\$15,405.00

Olita Elementary

Category

Requested Amount

Assessment & Maintenance	\$49,000.00
Filter	\$9,150.00
Monitor	\$16,800.00
Contingency	\$14,990.00

Jordan Elementary

Category

Requested Amount

Assessment & Maintenance	\$46,000.00
Filter	\$8,625.00
Monitor	\$16,200.00
Contingency	\$14,165.00

Macy Elementary

Category

Requested Amount

Assessment & Maintenance	\$47,000.00
Filter	\$9,000.00
Monitor	\$15,600.00

Contingency	\$14,320.00
Total Grant Award	\$444,720.00
Initial Payment	\$222,360.00
Final Payment	\$222,360.00

EXHIBIT C Contacts

CalSHAPE Program Staff

California Energy Commission
715 P Street
Sacramento, CA 95814
E-mail: CalSHAPE@energy.ca.gov

Confidential Deliverables/Products

Adrienne Winuk, Manager
California Energy Commission
Contracts, Grants and Loans Office
715 P Street, MS - 18
Sacramento, CA 95814
E-mail: Adrienne.Winuk@energy.ca.gov

Invoices, Progress Reports and Non-Confidential Deliverables to

Mary Hung
California Energy Commission
Accounting Office
714 P Street MS - 2
Sacramento, CA 95813
E-mail: Mary.Hung@energy.ca.gov

EXHIBIT C

Contacts

LEA Contact (Primary)

Name	Jim Coombs
Address	11019 Valley Home Avenue
City, State, Zip	Whittier, CA, 90603
E-mail	jcoombs@ljsd.org

LEA Contact (Alternate)

Name	David Bennett
Address	11019 Valley Home Avenue
City, State, Zip	Whittier, CA, 90603
E-mail	dbennett@ljsd.org

LEA Contact (Alternate)

Name	Jessica Fernandes
Address	11019 Valley Home Avenue
City, State, Zip	Whittier, CA, 90603
E-mail	jfernandes@ljsd.org

EXHIBIT D
CALIFORNIA SCHOOLS HEALTHY AIR, PLUMBING, AND EFFICIENCY
(CALSHAPE) STANDARD GRANT TERMS AND CONDITIONS

TABLE OF CONTENTS

SECTION	PAGE NO.
1. INTRODUCTION.....	2
2. DOCUMENTS INCORPORATED BY REFERENCE.....	2
3. STANDARD OF PERFORMANCE.....	3
4. DUE DILIGENCE	3
5. PRODUCTS	3
6. AMENDMENTS	4
7. CONTRACTING AND PROCUREMENT PROCEDURES	4
8. PAYMENT OF FUNDS.....	6
9. RESERVED	8
10. PREVAILING WAGE	8
11. RECORDKEEPING, COST ACCOUNTING, AND AUDITING	10
12. WORKERS' COMPENSATION INSURANCE	12
13. PERMITS AND CLEARANCES	12
14. EQUIPMENT	12
15. STOP WORK	13
16. TERMINATION	13
17. INDEMNIFICATION	14
18. RESERVED	14
19. RESERVED	14
20. INTELLECTUAL PROPERTY	14
21. RESERVED	15
22. GENERAL PROVISIONS	15
23. CERTIFICATIONS AND COMPLIANCE	16
24. RESERVED	19
25. COMMISSION REMEDIES FOR RECIPIENT'S NON-COMPLIANCE	19
26. DEFINITIONS	19

1. **Introduction**

This grant agreement (Agreement) between the California Energy Commission (Energy Commission, or Commission) and the Recipient is funded by the School Energy Efficiency Stimulus Program, established by Assembly Bill 841 (Ting, Chapter 372, Statutes of 2020), which in part provides grants to assess, maintain, adjust, repair, or upgrade heating, ventilation, and air conditioning systems. This grant program is referred to as the California Schools Healthy Air, Plumbing, and Efficiency (CalSHAPE) Ventilation Program.

This Agreement includes: (1) the Agreement signature page (**form CEC-146**); (2) the scope of work (**Exhibit A**); (3) the budget (**Exhibit B**); (4) a contacts list (**Exhibit C**); (5) these terms and conditions, which are standard requirements for CalSHAPE ventilation program grant awards (**Exhibit D**); (6) any special terms and conditions that the Energy Commission may impose to address the unique circumstances of the funded project, which take precedence in the event of a conflict with any provision of these terms and conditions (**Exhibit E**); (7) all attachments; and (8) all documents incorporated by reference.

All work and expenditure of Commission-reimbursed funds must occur prior to the Agreement term end date specified on the CEC-146 form.

2. **Documents Incorporated by Reference**

The documents below are incorporated by reference into this Agreement. These terms and conditions will govern in the event of a conflict with the documents below, with the exception of the documents in subsections (f) and (g) below. Where this Agreement or California laws and regulations are silent or do not apply, the Energy Commission will use the federal cost principles and acquisition regulations listed below as guidance in determining whether reimbursement of claimed costs is allowable. Documents incorporated by reference include:

Funding Documents

- a. The notice of funding availability for the project supported by this Agreement
- b. The Recipient's application submitted in response to the notice of funding availability

Program Guidelines

- c. CalSHAPE Ventilation Program Commission Guidelines, available at <https://www.energy.ca.gov/programs-and-topics/programs/california-schools-healthy-air-plumbing-and-efficiency-program>

Federal Cost Principles (applicable to state and local governments, Indian tribes, institutions of higher education, and nonprofit organizations)

- d. 2 Code of Federal Regulations (CFR) Part 200, Subpart E (Sections 200.400 et seq.)

Federal Acquisition Regulations (applicable to commercial organizations)

- e. 48 CFR, Ch.1, Subchapter E, Part 31, Subpart 31.2: Contracts with Commercial Organizations (supplemented by 48 CFR, Ch. 9, Subchapter E, Part 931, Subpart 931.2 for Department of Energy grants)

Nondiscrimination

- f. 2 California Code of Regulations, Section 11099 et seq.: Contractor Nondiscrimination and Compliance

General Laws

- g. Any federal, state, or local laws or regulations applicable to the project that are not expressly listed in this Agreement

3. Standard of Performance

In performing work under the Agreement, the Recipient, its subcontractors, and their employees are responsible for exercising the degree of skill and care required by customarily accepted good professional practices and procedures for the type of work performed.

4. Due Diligence

- a. The Recipient must take timely actions that, taken collectively, move this project to completion.
- b. Energy Commission staff will periodically evaluate the project schedule for completion of Scope of Work tasks. This evaluation may include but not be limited to random checks of project progress at periodic intervals set by the Energy Commission. Recipients subject to a project check must complete a progress report using a template prepared by the Energy Commission to provide information on the project status and expected completion date.
- c. If Energy Commission staff determines that: (1) the Recipient is not diligently completing the tasks in the Scope of Work; or (2) the time remaining in this Agreement is insufficient to complete all project tasks by the Agreement end date, Energy Commission staff may recommend that this Agreement be terminated, and the Commission may terminate this Agreement without prejudice to any of its other remedies.

5. Products

- a. **"Products"** are any tangible item specified for delivery to the Energy Commission in the Scope of Work, such as reports and summaries. The Recipient will submit all products identified in the Scope of Work to Energy Commission staff, in the manner and form specified in the Scope of Work.

If Energy Commission staff determines that a product is substandard given its description and intended use as described in this Agreement, Energy Commission staff, without prejudice to any of the Commission's other remedies, may refuse to authorize payment for the product and any subsequent products that rely on or are based upon the product under this Agreement.

- b. Failure to Submit Products

Failure to submit a product required in the Scope of Work may be considered material noncompliance with the Agreement terms. Without prejudice to any other remedies, noncompliance may result in actions such as the withholding of future payments or awards, or the suspension or termination of the Agreement.

- c. Legal Statements on Products

All documents that result from work funded by this Agreement and are released to the public must include the following statement to ensure no Commission endorsement of documents:

LEGAL NOTICE

This document was prepared as a result of work sponsored by the California Energy Commission. It does not necessarily represent the views of the Energy Commission, its employees, or the State of California. Neither the Commission, the State of California, nor the Commission's employees, contractors, or subcontractors makes any warranty, express or implied, or assumes any legal liability for the information in this document; nor does any party represent that the use of this information will not infringe upon privately owned rights. This document has not been approved or disapproved by the Commission, nor has the Commission passed upon the accuracy of the information in this document.

6. Amendments

a. Procedure for Requesting Extensions

The Recipient must submit a written request to the CalSHAPE Program for a one-time only extension to the Agreement, not to exceed six-months nor the final program reporting deadline date of June 1, 2026. The request must include:

- A brief summary of the proposed extension; and
- A brief summary of the reason(s) for the extension

b. Approval of Changes

No amendment or variation of this Agreement shall be valid unless made in writing and signed by both of the parties except for the Commission's unilateral termination rights in Section 16 of these terms. No oral understanding or agreement is binding on any of the parties.

7. Contracting and Procurement Procedures

This section provides general requirements for agreements entered into between the Recipient and subcontractors for the performance of this Agreement.

a. Contractor's Obligations to Subcontractors

1) The Recipient is responsible for handling all contractual and administrative issues arising out of or related to any subcontracts it enters into for the performance of this Agreement.

2) Nothing contained in this Agreement or otherwise creates any contractual relation between the Commission and any subcontractors, and no subcontract may relieve the Recipient of its responsibilities under this Agreement. The Recipient agrees to be as fully responsible to the Commission for the acts and omissions of its subcontractors or persons directly or indirectly employed by any of them as it is for the acts and omissions of persons directly employed by the Recipient.

The Recipient's obligation to pay its subcontractors is an independent obligation from the Commission's obligation to make payments to the Recipient. As a result, the Commission has no obligation to pay or enforce the payment of any funds to any subcontractor.

3) The Recipient is responsible for establishing and maintaining contractual agreements with and reimbursing each subcontractor for work performed in accordance with the terms of this Agreement.

b. Flow-Down Provisions

Subcontracts funded in whole or in part by this Agreement must include language conforming to the provisions below, unless the subcontracts are entered into by the University of California (UC) or the U.S. Department of Energy (DOE) national laboratories. UC may use the terms and conditions negotiated by the Energy Commission with UC for its subcontracts. DOE national laboratories may use the terms and conditions negotiated with DOE (please contact the Commission Grants Officer for these terms).

- Standard of Performance (Section 3)
- Legal Statements on Products (included in Section 5, "Products")
- Prevailing Wage (Section 10)
- Recordkeeping, Cost Accounting, and Auditing (Section 11)
- Equipment (Section 14)
- Indemnification (Section 17)
- Intellectual Property (Section 20)
- Access to Sites and Records (included in Section 22, "General Provisions")
- Nondiscrimination (included in Section 23, "Certifications and Compliance")
- Survival of the following sections:
 - Equipment (Section 14)
 - Recordkeeping, Cost Accounting, and Auditing (Section 11)
 - Intellectual Property (Section 20)
 - Access to Sites and Records (included in Section 22, "General Provisions")

Subcontracts funded in whole or in part by this Agreement must also include the following:

- A clear and accurate description of the material, products, or services to be procured.
- A detailed budget and timeline.
- Provisions that allow for administrative, contractual, or legal remedies in instances where subcontractors breach contract terms, in addition to sanctions and penalties as may be appropriate.
- Provisions for termination by the Recipient, including termination procedures and the basis for settlement.
- A statement that further assignments will not be made to any third or subsequent tier subcontractor without additional advance written consent of the Commission.

c. Audits

All subcontracts entered into for the performance of this Agreement are subject to examination and audit by the Energy Commission, Bureau of State Audits, or the California Public Utilities Commission for a period of three (3) years after payment of the Recipient's final invoice under this Agreement.

d. Copies of Subcontracts

The Recipient must provide a copy of its subcontracts upon request by the Energy Commission.

e. Conflicting Subcontract Terms

Prior to the execution of this Agreement, the Recipient will notify the CalSHAPE Program of any known or reasonably foreseeable conflicts between this Agreement and its agreements with any subcontractors (e.g., conflicting intellectual property or payment terms). If the Recipient discovers any such conflicts after the execution of this Agreement, it will notify the CalSHAPE Program of the conflict within fifteen (15) days of discovery. The Energy Commission may, without prejudice to its other remedies, terminate this Agreement if any conflict impairs or diminishes its value.

f. Penalties for Noncompliance

Without limiting the Commission's other remedies, failure to comply with the above requirements may result in the termination of this Agreement.

8. Payment of Funds

a. Timing of Payment

See Chapter 3, Section G, Timing of Payment, of the CalSHAPE Ventilation Commission Guidelines.

Final payment will only be made after the Energy Commission: (1) receives and approves the Recipient's final reporting; and (2) receives and accepts all other required documentation necessary for the Energy Commission to determine the total final amount due to the Recipient, based on actual and allowable Incurred Costs and Paid Costs under this Agreement, up to the total grant award amount.

Without limiting any other rights and remedies available to the Energy Commission, Recipient must return funds to the Energy Commission received under this Agreement if, for example, the Recipient was overpaid in the first payment, did not complete the project, or did not meet other program requirements.

b. Reimbursable Cost Requirements

In addition to any other requirements in this Agreement, the Energy Commission is only obligated to reimburse the Recipient for Incurred and Paid Costs that are (1) incurred during the Agreement Term; (2) invoiced within the required timeframes of this Agreement; (3) made in accordance with the Agreement's Budget; and (4) actual and allowable expenses under this Agreement.

ALL of the items in the Budget are capped amounts (i.e., maximums), and the Recipient can only bill its ACTUAL amount up to capped amounts listed in the Budget. For example, if the Budget includes an employee's hourly rate of \$50/hour but the employee is only paid \$40/hour, the Recipient can only bill for \$40/hour. Under the same example, if the employee earned \$70/hour but the Budget only lists \$50/hour, the Recipient can only bill for \$50. If the actual rates exceed the approved rates in the Budget, the difference may be charged to the agreement as a match share expenditure.

c. Payment Requests

Recipient agrees and acknowledges that time is of the essence in submitting the final payment request. The Commission has a limited period of time, set by law, in which it can reimburse funds under this Agreement. Without prejudice to the Commission's other rights, the Recipient risks not receiving any funds, and relieves the Commission of any duty and liability whatsoever to pay, for any payment requests received after the end of the Agreement.

d. Invoice Approval and Disputes:

Payment is subject to Energy Commission staff's approval. Payments will be made to the Recipient for undisputed invoices. An undisputed invoice is an invoice submitted by the Recipient for work performed, for which project expenditures and products meet all Agreement conditions, and for which additional evidence is not required to determine its validity.

The invoice will be disputed if all products due for the billing period have not been received and approved, if the invoice is inaccurate, or if it does not comply with the terms of this Agreement. If the invoice is disputed, the Recipient will be notified by the CEC.

e. Multiple Non-Energy Commission Funding Sources:

No payment will be made for costs identified in recipient invoices that have been or will be reimbursed by another source, including but not limited to an agreement with another government entity.

"Government Entity" means: (1) a state governmental agency; (2) a state college or university; (3) a local government entity or agency, including those created as a Joint Powers Authority; (4) an auxiliary organization of the California State University or a California community college; (5) the federal government; (6) a foundation organized to support the Board of Governors of the California Community Colleges; and (7) an auxiliary organization of the Student Aid Commission established under California Education Code Section 69522.

f. Reduced funding:

If the Energy Commission does not receive sufficient funds under the Budget Act or from the investor-owned utility administrators of the CalSHAPE program to fully fund the work identified in Exhibit A (Scope of Work), the following will occur:

- 1) If the Energy Commission has received a reduced amount of funds for the work, it may: (1) offer an Agreement amendment to the Recipient to reflect the reduced amount; or (2) cancel this Agreement (with no liability occurring to the State).
- 2) If the Energy Commission has received no funds for the work identified in Exhibit A: (1) this Agreement will be of no force and effect; (2) the State will have no obligation to pay any funds to the Recipient; and (3) the Recipient will have no obligation to perform any work under this Agreement.

g. Allowability of Costs

- 1) Allowable Costs

The costs for which the Recipient will be reimbursed under this Agreement include all costs, direct and indirect, incurred in the performance of the work identified in the Scope of Work. Costs must be incurred within the Agreement term. Factors to be considered in determining whether an individual item of cost is allowable include: (i) reasonableness of the item, including necessity of the item for the work; (ii) applicable federal cost principles or acquisition regulations incorporated by reference in Section 2 of this Agreement; and (iii) the terms and conditions of this Agreement.

2) Unallowable Costs

See Chapter 3, Section I, Ineligible Costs, of the CalSHAPE Ventilation Program Commission Guidelines.

3) Except as provided for in this Agreement or applicable California law or regulations, the Recipient will use the federal cost principles and/or acquisition regulations incorporated by reference in Section 2 of this Agreement when determining allowable and unallowable costs. In the event of a conflict, this Agreement takes precedence over the federal cost principles and/or acquisition regulations.

h. Final Invoice for Remaining Funds

See Chapter 4, Section C, Final Documentation and Invoice for Remaining Funds, of the CalSHAPE Ventilation Program Commission Guidelines. The Recipient must submit all invoices electronically by uploading them to the CalSHAPE Online System, which is found at <https://calshape.energy.ca.gov/>.

i. If the Recipient has not otherwise provided to the Commission documentation showing the Recipient's payment of Incurred Costs, the Recipient shall provide such documentation as soon as possible and not later than three working days from a request from Commission personnel.

j. Certification

The following certification will be included on each payment request form and signed by the Recipient's authorized officer:

The documents included in this request for payment are true and correct to the best of my knowledge and I have authority to submit this request. I certify that reimbursement for these costs has not and will not be received from any other sources, including but not limited to a government entity contract, subcontract, or other procurement method. For projects considered to be a public work, prevailing wages were paid to eligible workers who provided labor for the work covered by this invoice; the Recipient and all subcontractors have complied with prevailing wage laws.

9. **Reserved**

10. **Prevailing Wage**

a. Requirement

Projects funded by the Energy Commission often involve construction, alteration, demolition, installation, repair, or maintenance work over \$1,000. Such projects might be considered "public works" under the California Labor Code (See California Labor Code Section 1720 et seq. and Title 8 California Code of Regulations, Section 16000 et seq.). Public works projects require the payment of prevailing wages. Prevailing wage rates can be significantly higher than non-prevailing wage rates.

b. Determination of Project's Status

Only the California Department of Industrial Relations (DIR) and courts of competent jurisdiction may issue legally binding determinations that a particular project is or is not a public work. If the Recipient is unsure whether the project funded by the Agreement is a "public work" as defined in the California Labor Code, it may wish to seek a timely determination from DIR or an appropriate court. As such processes can be time consuming, it may not be possible to obtain a timely determination before the date for performance of the Agreement.

By accepting this grant, the Recipient is fully responsible for complying with all California public works requirements, including but not limited to payment of prevailing wage. As a material term of this grant, the Recipient must either:

- 1) Timely obtain a legally binding determination from DIR or a court of competent jurisdiction before work begins on the project that the proposed project is not a public work; or
- 2) Assume that the project is a public work and ensure that:
 - Prevailing wages are paid unless and until DIR or a court of competent jurisdiction determines that the project is not a public work;
 - The project budget for labor reflects these prevailing wage requirements; and
 - The project complies with all other requirements of prevailing wage law, including but not limited to keeping accurate payroll records and complying with all working hour requirements and apprenticeship obligations.

California Prevailing Wage law provides for substantial damages and financial penalties for failure to pay prevailing wages when such payment is required.

c. Subcontractors and Flow-down Requirements

The Recipient will ensure that its subcontractors also comply with the public works/prevailing wage requirements above. The Recipient will ensure that all agreements with its subcontractors to perform work related to this Project contain the above terms regarding payment of prevailing wages on public works projects. The Recipient is responsible for any failure of its subcontractors to comply with California prevailing wage and public works laws.

d. Indemnification and Breach

Any failure of the Recipient or its subcontractors to comply with the above requirements will constitute breach of this Agreement which excuses the Commission's performance of this Agreement at the Commission's option, and will be at the Recipient's sole risk. In such a case, the Commission will refuse payment to the Recipient of any amount under this award and the Commission will be released, at its option, from any further performance of this Agreement or any portion thereof. The Recipient will indemnify the Energy Commission and hold it harmless for any and all financial consequences arising out of or resulting from the failure of the Recipient and/or any of its subcontractors to pay prevailing wages or to otherwise comply with the requirements of prevailing wage law.

e. Budget

The Recipient's budget on public works projects must indicate which job classifications are subject to prevailing wage. For detailed information about prevailing wage and the process to determine if the proposed project is a public work, the Recipient may wish to contact DIR or a qualified labor attorney for guidance.

f. Covered Trades

For public works projects, the Recipient may contact DIR for a list of covered trades and the applicable prevailing wage.

g. Questions

If the Recipient has any questions about this contractual requirement or the wage, record keeping, apprenticeship, or other significant requirements of California prevailing wage law, the Recipient should consult DIR and/or a qualified labor attorney before entering into this Agreement.

h. Certification

The Recipient will certify to the Energy Commission on each payment request form either that: (a) prevailing wages were paid to eligible workers who provided labor for work covered by the payment request and the Recipient and all contractors and subcontractors otherwise complied with all California prevailing wage laws; or (b) the project is not a public work requiring the payment of prevailing wages. In the latter case, the Recipient will provide competent proof of a DIR or court determination that the project is not a public work requiring the payment of prevailing wages.

Prior to the release of any retained funds under this Agreement, the Recipient will submit to the Energy Commission the above-described certificate signed by the Recipient and all contractors and subcontractors performing public works activities on the project. Absent this certificate, the Recipient will have no right to any funds under this Agreement, and Commission will be relieved of any obligation to pay any funds.

11. Recordkeeping, Cost Accounting, and Auditing

a. Cost Accounting

The Recipient will keep separate, complete, and correct accounting of the costs involved in completing the project and any match-funded portion of the project. The Commission or its agent will have the right to examine the Recipient's books of accounts at all reasonable times, to the extent necessary to verify the accuracy of the Recipient's reports.

b. Accounting Procedures

The Recipient's costs will be determined on the basis of its accounting system procedures and practices employed as of the effective date of this Agreement, provided that the Recipient uses generally accepted accounting principles and cost reimbursement practices. The Recipient's cost accounting practices used in accumulating and reporting costs during the performance of this Agreement will be consistent with the practices used in estimating costs for any proposal to which this Agreement relates; provided that such practices are consistent with the other terms of this Agreement and that such costs may be accumulated and reported in greater detail during performance of this Agreement.

The Recipient's accounting system will distinguish between direct and indirect costs. All costs incurred for the same purpose, in like circumstances, are either direct costs only or indirect costs only with respect to costs incurred under this Agreement.

c. Inspections, Assessment, and Studies

If selected, the Recipient must cooperate with and participate in the following:

- 1) An assessment of a funded project's greenhouse gas reductions and energy savings. This may include, but is not limited to, requests from Energy Commission staff or its delegate for data, project and equipment information, and reasonable access to the project site to assist with determining greenhouse gas reductions and energy savings attributable to the funded project. Costs associated with any activities associated with such an assessment will not be funded by a CalSHAPE Program grant.
- 2) A site inspection and verification of installation and operation of new fixtures and appliances. This may include, but is not limited to, providing Energy Commission staff or its delegates reasonable access to the funded project site to inspect and verify installation and operation. Recipient understands that any such inspection and verification by Energy Commission staff or its delegates is not a safety inspection.
- 3) A measurement and evaluation study that will be used to analyze current program performance and improve future program designs. This may include but is not limited to providing Energy Commission staff or its delegates data, project and equipment information, and reasonable access to the funded project site.

d. Audit Rights

The Recipient will maintain books, records, documents, and other evidence, based on the procedures set forth above, sufficient to reflect properly all costs claimed to have been incurred in the performance of this Agreement. The Energy Commission, another state agency, and/or a public accounting firm designated by the Energy Commission may audit the Recipient's accounting records at all reasonable times, with prior notice by the Energy Commission.

It is the intent of the parties that the audits will ordinarily be performed not more frequently than once every twelve (12) months during the performance of the work and once at any time within three (3) years after payment by the Energy Commission of the Recipient's final invoice. However, performance of any such interim audits by the Energy Commission does not preclude further audit. The Energy Commission may audit books, records, documents, and other evidence relevant to the Recipient's royalty payment obligations (see Section 21) for a period of ten (10) years after payment of the Recipient's final invoice.

The Recipient will allow the auditor(s) to access such records during normal business hours, and will allow interviews of any employees who might reasonably have information related to such records. The Recipient will include a similar right of the state to audit records and interview staff in any subcontract related to the performance of this Agreement.

e. Refund to the Energy Commission

If the Energy Commission determines that any invoiced and paid amounts exceed the actual allowable incurred costs, the Recipient will repay the amounts to the Energy Commission within thirty (30) days of request or as otherwise agreed by the Energy Commission and the Recipient. If the Energy Commission does not receive such repayments, it will be entitled to take any actions enforce any remedies available to it, such as withholding further payments to the Recipient and seeking repayment from the Recipient.

f. Audit Cost

The Recipient will bear its cost of participating in any audit (e.g., mailing or travel expenses). The Energy Commission will bear the cost of conducting the audit unless the audit reveals an error detrimental to the Energy Commission that exceeds more than ten percent (10%) or \$5,000 (whichever is greater) of the amount audited. The Recipient will pay the refund as specified in subsection (d), and will reimburse the Energy Commission for reasonable costs and expenses incurred by the Commission in conducting the audit.

g. Match or Cost Share

If the budget includes a match share requirement, the Recipient's commitment of resources, as described in this Agreement, is a required expenditure for receipt of Energy Commission funds. The funds will be released only if the required match percentages are expended. The Recipient must maintain accounting records detailing the expenditure of the match (actual cash and in-kind, non-cash services), and report on match share expenditures on its request for payment.

12. Workers' Compensation Insurance

- a. The Recipient warrants that it carries Worker's Compensation Insurance for all of its employees who will be engaged in the performance of this Agreement, and agrees to furnish to the CalSHAPE Program satisfactory evidence of this insurance upon the CalSHAPE Program's request.
- b. If the Recipient is self-insured for worker's compensation, it warrants that the self-insurance is permissible under the laws of the State of California and agrees to furnish to the CalSHAPE Program satisfactory evidence of the insurance upon the CalSHAPE Program's request.

13. Permits and Clearances

The Recipient is responsible for ensuring that all necessary permits and environmental documents are prepared and that clearances are obtained from the appropriate agencies.

14. Equipment

Title to equipment acquired by the Recipient with grant funds will vest in the Recipient. The Recipient may use the equipment in the project or program for which it was acquired as long as needed, regardless of whether the project or program continues to be supported by grant funds. However, the Recipient may not sell, lease, or encumber the property (i.e., place a legal burden on the property such as a lien) during the Agreement term without Energy Commission Staff's prior written approval.

The Recipient may refer to the applicable federal regulations incorporated by reference in this Agreement for guidance regarding additional equipment requirements.

15. Stop Work

Energy Commission staff may, at any time by written notice to the Recipient, require the Recipient to stop all or any part of the work tasks in this Agreement. Stop work orders may be issued for reasons such as a project exceeding budget, noncompliance with the standard of performance, out of scope work, project delays, and misrepresentations.

- a. Compliance. Upon receipt of a stop work order, the Recipient must immediately take all necessary steps to comply with the order and to stop the incurrence of costs allocable to the Energy Commission.
- b. Canceling a Stop Work Order. The Recipient may resume the work only upon receipt of written instructions from Energy Commission staff.

16. Termination

a. Purpose

Because the Energy Commission is a state entity and provides funding on behalf of all California ratepayers, it must be able to terminate the Agreement upon the default of the Recipient and to proceed with the work required under the Agreement in any manner it deems proper. The Recipient agrees that upon any of the events triggering the termination of the Agreement by the Energy Commission, the Energy Commission has the right to terminate the Agreement, and it would constitute bad faith of the Recipient to interfere with the immediate termination of the Agreement by the Energy Commission.

b. With Cause

The Energy Commission may, for cause, terminate this Agreement upon giving five (5) calendar days advance written notice to the Recipient. In this event, the Recipient will use all reasonable efforts to mitigate its expenses and obligations. The Recipient will relinquish possession of equipment purchased for this Agreement with Energy Commission funds to the Commission, or the Recipient may purchase the equipment as provided by the terms of this Agreement, with approval of the Energy Commission.

The term "for cause" includes but is not limited to the following:

- Partial or complete loss of match funds;
- Reorganization to a business entity unsatisfactory to the Energy Commission;
- Retention or hiring of subcontractors, or replacement or addition of personnel, that fail to perform to the standards and requirements of this Agreement;
- The Recipient's inability to pay its debts as they become due and/or the Recipient's default of an obligation that impacts its ability to perform under this Agreement; or
- Significant change in state or Energy Commission policy such that the work or product being funded would not be supported by the Commission.

c. Without Cause

The Energy Commission may terminate this Agreement without cause upon giving thirty (30) days advance written notice to the Recipient. In this event, the Recipient will use all reasonable efforts to mitigate its expenses and obligations.

17. Indemnification

To the extent allowed under California law, the Recipient will indemnify, defend, and hold harmless the state (including the Energy Commission) and state officers, agents, and employees from any and all claims and losses in connection with the performance of this Agreement.

18. Reserved

19. Reserved

20. Intellectual Property

- a. The Energy Commission makes no claim to intellectual property developed under this Agreement that is not specified for delivery, except as expressly provided herein.

"Intellectual property" means: (a) inventions, technologies, designs, drawings, data, software, formulas, compositions, processes, techniques, works of authorship, trademarks, service marks, and logos that are created, conceived, discovered, made, developed, altered, or reduced to practice with Agreement or match funds during or after the Agreement term; (b) any associated proprietary rights to these items, such as patent and copyright; and (c) any upgrades or revisions to these items.

"Works of authorship" does not include written products created for Agreement reporting and management purposes, such as reports, summaries, lists, letters, agendas, schedules, and invoices.

- b. The Energy Commission owns all products identified in the Scope of Work, with the exception of products that fall within the definition of "intellectual property."

"Product" means any tangible item specified for delivery to the Energy Commission in the Scope of Work.

- c. Both the Energy Commission and the California Public Utilities Commission have a no-cost, non-exclusive, transferable, irrevocable, royalty-free, worldwide, perpetual license to use, publish, translate, modify, and reproduce intellectual property for governmental purposes, including but not limited to providing data and reports to the California Public Utilities Commission, State legislature, and Utilities and using data for the development of future programs.

- d. Intellectual Property Indemnity

The Recipient may not, in supplying work under this Agreement, knowingly infringe or misappropriate any intellectual property right of a third party, and will take reasonable actions to avoid infringement.

To the extent allowed under California law, the Recipient will defend and indemnify the Energy Commission and the California Public Utilities Commission from and against any claim, lawsuit, or other proceeding, loss, cost, liability, or expense (including court costs and reasonable fees of attorneys and other professionals) to the extent arising out of: (i) any third party claim that a product infringes any patent, copyright, trade secret, or other intellectual property right of any third party; or (ii) any third party claim arising out of the negligent or other tortious acts or omissions by the Recipient or its employees, subcontractors, or agents in connection with or related to the products or the Recipient's performance under this Agreement.

21. Reserved

22. General Provisions

a. Governing Law

This Agreement is governed by the laws of the State of California as to interpretation and performance.

b. Independent Capacity

In the performance of this Agreement, the Recipient and its agents, subcontractors, and employees will act in an independent capacity and not as officers, employees, or agents of the State of California.

c. Assignment

This Agreement is not assignable or transferable by the Recipient either in whole or in part without the consent of the Energy Commission in the form of an amendment.

d. Timeliness

Time is of the essence in this Agreement.

e. Severability

If any provision of this Agreement is unenforceable or held to be unenforceable, all other provisions of this Agreement will remain in full force and effect.

f. Waiver

No waiver of any breach of this Agreement constitutes waiver of any other breach. All remedies in this Agreement will be taken and construed as cumulative, meaning in addition to every other remedy provided in the Agreement or by law.

g. Assurances

The Commission reserves the right to seek further written assurances from the Recipient and its team that the work under this Agreement will be performed in accordance with the terms of the Agreement.

h. Change in Business

- 1) The Recipient will promptly notify the Energy Commission of the occurrence of any of the following:
 - a) A change of address.
 - b) A change in business name or ownership.
 - c) The existence of any litigation or other legal proceeding affecting the project or Agreement.

- d) The occurrence of any casualty or other loss to project personnel, equipment, or third parties.
 - e) Receipt of notice of any claim or potential claim against the Recipient for patent, copyright, trademark, service mark, and/or trade secret infringement that could affect the Energy Commission's rights.
- 2) The Recipient must provide the CalSHAPE Program with written notice of a planned change or reorganization of the type of business entity under which it does business. A change of business entity or name change requires an amendment assigning or novating the Agreement to the changed entity. If the Energy Commission does not seek to amend this Agreement or enter into a new agreement with the changed or new entity for any reason (including that the Commission is not satisfied that the new entity can perform in the same manner as the Recipient), it may terminate this Agreement as provided in the "Termination" section.
- i. Access to Sites and Records
Energy Commission and California Public Utilities Commission staff and representatives will have reasonable access to all project sites and to all records related to this Agreement.
- j. Prior Dealings, Custom, or Trade Usage
These terms and conditions may not be modified or supplemented by prior dealings, custom, or trade usage.
- k. Survival of Terms
Certain provisions will survive the completion or termination date of this Agreement for any reason. The provisions include but are not limited to:
 - Legal Statements on Products (included in Section 5, "Products")
 - Payment of Funds (Section 8)
 - Recordkeeping, Cost Accounting, and Auditing (Section 11)
 - Equipment (Section 14)
 - Termination (Section 16)
 - Indemnification (Section 17)
 - Intellectual Property (Section 20)
 - Change in Business (see this section)
 - Access to Sites and Records (see this section)

23. *Certifications and Compliance*

a. Federal, State, and Local Laws

The Recipient must obtain all required permits and shall comply with all applicable federal, state and local laws, codes, rules, and regulations for all work performed under the Agreement.

b. Nondiscrimination Statement of Compliance

During the performance of this Agreement, the Recipient and its subcontractors will not unlawfully discriminate, harass, or allow harassment against any employee or applicant for employment because of sex, sexual orientation, race, color, ancestry, religious creed, national origin, physical disability (including HIV and AIDS), mental disability, medical condition, age, marital status, or denial of family care leave. The Recipient and its subcontractors will ensure that the evaluation and treatment of their employees and applicants for employment are free from such discrimination and harassment.

The Recipient and its subcontractors will comply with the provisions of the Fair Employment and Housing Act (Government Code Sections 12990 et seq.) and the applicable regulations promulgated thereunder (California Code of Regulations, Title 2, Section 11000 et seq.). The applicable regulations of the Fair Employment and Housing Commission implementing Government Code Section 12990 (a-f), set forth in Chapter 5 of Division 4.1 of Title 2 of the California Code of Regulations, are incorporated into this Agreement by reference and made a part of it as if set forth in full. The Recipient and its subcontractors will give written notice of their obligations under this section to labor organizations with which they have a collective bargaining or other Agreement.

The Recipient will include the nondiscrimination and compliance provisions of this section in all subcontracts to perform work under this Agreement.

c. Drug-Free Workplace Certification

By signing this Agreement, the Recipient certifies under penalty of perjury under the laws of the State of California that it will comply with the requirements of the Drug-Free Workplace Act of 1990 (Government Code Section 8350 et seq.) and will provide a drug-free workplace by taking the following actions:

- 1) Publish a statement notifying employees that unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited, and specifying actions to be taken against employees for violations as required by Government Code Section 8355(a).
- 2) Establish a Drug-Free Awareness Program as required by Government Code Section 8355(b) to inform employees about all of the following:
 - The dangers of drug abuse in the workplace;
 - The person's or organization's policy of maintaining a drug-free workplace;
 - Any available counseling, rehabilitation, and employee assistance programs; and
 - Penalties that may be imposed upon employees for drug abuse violations.
- 3) Provide, as required by Government Code Section 8355(c), that every employee who works on the proposed project:
 - Will receive a copy of the company's drug-free policy statement; and
 - Will agree to abide by the terms of the company's statement as a condition of employment on the project.

Failure to comply with these requirements may result in suspension of payments under the Agreement or termination of the Agreement or both, and the Recipient may be ineligible for any future state awards if the Commission determines that any of the following has occurred: (1) the Recipient has made false certification, or (2) violates the certification by failing to carry out the requirements as noted above.

d. National Labor Relations Board Certification (Not applicable to public entities)

The Recipient, by signing this Agreement, swears under penalty of perjury that no more than one final unappealable finding of contempt of court by a federal court has been issued against the Recipient within the immediately preceding two year period because of the Recipient's failure to comply with an order of a federal court that orders the Recipient to comply with an order of the National Labor Relations Board.

e. Child Support Compliance Act (Applicable to California Employers)

For any agreement in excess of \$100,000, the Recipient acknowledges that:

- 1) It recognizes the importance of child and family support obligations and will fully comply with all applicable state and federal laws relating to child and family support enforcement, including but not limited to disclosure of information and compliance with earnings assignment orders, as provided in Chapter 8 (commencing with section 5200) of Part 5 of Division 9 of the Family Code; and
- 2) To the best of its knowledge is fully complying with the earnings assignment orders of all employees and is providing the names of all new employees to the New Hire Registry maintained by the California Employment Development Department.

f. Air or Water Pollution Violation

Under state laws, the Recipient will not be:

- 1) In violation of any order or resolution not subject to review promulgated by the State Air Resources Board or an air pollution control district;
- 2) Subject to a cease and desist order not subject to review issued pursuant to Section 13301 of the Water Code for violation of waste discharge requirements or discharge prohibitions; or
- 3) Finally determined to be in violation of provisions of federal law relating to air or water pollution.

g. Americans With Disabilities Act

By signing this Agreement, the Recipient assures the State that it complies with the Americans with Disabilities Act (ADA) of 1990 (42 U.S.C. Section 12101, et seq.), which prohibits discrimination on the basis of disability, as well as applicable regulations and guidelines issued pursuant to the ADA.

24. **Reserved**

25. **Commission Remedies for Recipient's Non-Compliance**

Without limiting any of its other remedies, the Commission may, for Recipient's noncompliance of any Agreement requirement, withhold future payments, demand and be entitled to repayment of past reimbursements, or suspend or terminate this Agreement. The tasks in the Scope of Work are non-severable, and completion of all of them is material to this Agreement. Thus, the Commission, without limiting its other remedies, is entitled to repayment of all funds paid to Recipient if the Recipient does not timely complete all tasks in the Scope of Work.

26. **Definitions**

- **Agreement Term** means the length of this Agreement, as specified on the Agreement signature page (form CEC-146).
- **Data** means any recorded information that relates to the project funded by the Agreement, whether created or collected before or after the Agreement's effective date.
- **Effective Date** means the date on which this Agreement is signed by the last party required to sign, provided that signature occurs after the Agreement has been approved by the Energy Commission at a business meeting or by the Executive Director or his/her designee.
- **Equipment** means products, objects, machinery, apparatus, implements, or tools that are purchased or constructed with Energy Commission funds for the project, and that have a useful life of at least one year and an acquisition unit cost of at least \$5,000. "Equipment" includes products, objects, machinery, apparatus, implements, or tools that are composed by over thirty percent (30%) of materials purchased for the project. For purposes of determining depreciated value of equipment used in the Agreement, the project will terminate at the end of the normal useful life of the equipment purchased and/or developed with Energy Commission funds. The Energy Commission may determine the normal useful life of the equipment.
- **Intellectual Property** means: (a) inventions, technologies, designs, drawings, data, software, formulas, compositions, processes, techniques, works of authorship, trademarks, service marks, and logos that are created, conceived, discovered, made, developed, altered, or reduced to practice with Agreement or match funds during or after the Agreement term; (b) any associated proprietary rights to these items, such as patent and copyright; and (c) any upgrades or revisions to these items.

"Works of authorship" does not include written products created for Agreement reporting and management purposes, such as reports, summaries, lists, letters, agendas, schedules, and invoices.
- **Invention** means intellectual property that is patentable.
- **Match Funds** means cash or in-kind (i.e., non-cash) contributions provided by the Recipient or a third party for a project funded by the Energy Commission. If this Agreement resulted from a solicitation, refer to the solicitation's discussion of match funding for guidelines specific to the project.

- **Materials** means the substances used to construct, or as part of, a finished object, commodity, device, article, or product and that does not meet the definition of Equipment.
- **Ownership** means exclusive possession of all rights to property, including the right to use and transfer property.
- **Product** means any tangible item specified for delivery to the Energy Commission in the Scope of Work.
- **Project** means the entire effort undertaken and planned by the Recipient and consisting of the work funded by the Energy Commission. The project may coincide with or extend beyond the Agreement term.
- **State** means the state of California and all California state agencies within it, including but not limited to commissions, boards, offices, and departments.

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Resolution 2025/26 No. 980 Approving Agreement for
the SVPP (School Violence Prevention Program) -
COPS (Office of Community Oriented Policing
Services) Funding Opportunity

ACTION/
(RESOLUTION)

The Office of Community Oriented Policing Services (COPS) is the component of the US Department of Justice responsible for advancing the practice of community policing by the nation's state, local, territorial and tribal law enforcement agencies through information and grant resources. The COPS Office School Violence Prevention Program (SVPP) provides funding directly to states, units of local government, Indian tribes and their public agencies to improve security at schools and on school grounds in the recipient's jurisdiction through evidence-based school safety programs.

If granted the SVPP funds LJSD will work in partnership with the La Habra Police Department, La Habra City Council and La Habra City School District to increase our school safety by:

- Utilizing access control measures: implementing key cards and smart locks to regulate entry points, ensuring only authorized individuals have access to specific areas during pre-approved times.
- Development of Emergency Response Plans: Collaborating with the La Habra Police Department to develop and regularly rehearse comprehensive response plans for potential threats or safety issues, including after regular school hours crisis response.
- Collaboration with Local EMS and Neighboring Schools: Forging partnerships with law enforcement agencies and neighboring school districts to share information, enhance response times, and facilitate seamless collaboration in ensuring campus safety.
- Implementation of Clear Signage and Expectations: Ensuring proper signage and communication of expectations for all after-school activities to visitors, parents, law enforcement, and staff.
- Enhancement of Parking Lot Safety: Ensuring well-lit, clearly marked, and monitored parking lots through the use of technology such as high-definition cameras, license

Superintendent's Comment:

ADOPTION BY MAJORITY ROLL CALL VOTE.

plate reader (LPR) cameras, audio detection equipment, and designated points of contact equipped with emergency communication devices.

- Designation of Emergency Contacts: Designating a point of contact for each event equipped with emergency communication devices to facilitate quick response in case of emergencies.
- Monitoring of Campus with Technology: Integrating technology such as high-definition cameras to effectively monitor campus access points and feed live streams to responding law enforcement or EMS.

Lowell Joint School District is applying for \$400,000.00 to assist with the goals and objectives stated above. The agreement would begin on October 1, 2025 and be valid for 36 months.

The purpose of this agreement is to move forward with the SVPP - COPS funding opportunity.

It is recommended that Resolution 2025/26 No. 980 Approving the Agreement and Funding from the SVPP (School Violence Prevention Program)-COPS (Office of Community Oriented Policing Services) funding opportunity be adopted, and that the Superintendent or designee be authorized to execute the resolution.

Attachment

Superintendent's Comment:

ADOPTION BY MAJORITY ROLL CALL VOTE.

LOWELL JOINT SCHOOL DISTRICT

RESOLUTION 2025/2026 NO. 980

RESOLUTION OF THE BOARD OF TRUSTEES OF THE LOWELL JOINT SCHOOL DISTRICT OF LOS ANGELES AND ORANGE COUNTIES, CALIFORNIA,

APPROVING AGREEMENT FOR THE SVPP (SCHOOL VIOLENCE PREVENTION PROGRAM) COPS (OFFICE OF COMMUNITY ORIENTED POLICING SERVICES) FUNDING OPPORTUNITY

The Office of Community Oriented Policing Services (COPS) is the component of the US Department of Justice responsible for advancing the practice of community policing by the nation's state, local, territorial and tribal law enforcement agencies through information and grant resources. The COPS Office School Violence Prevention Program (SVPP) provides funding directly to states, units of local government, Indian tribes and their public agencies to improve security at schools and on school grounds in the recipient's jurisdiction through evidence-based school safety programs.

WHEREAS, the SVPP funds LJSD will work in partnership with the La Habra Police Department, La Habra City Council and La Habra City School District to increase our school safety by:

- Utilizing access control measures: implementing key cards and smart locks to regulate entry points, ensuring only authorized individuals have access to specific areas during pre-approved times.
- Development of Emergency Response Plans: Collaborating with the La Habra Police Department to develop and regularly rehearse comprehensive response plans for potential threats or safety issues, including after regular school hours crisis response.
- Collaboration with Local EMS and Neighboring Schools: Forging partnerships with law enforcement agencies and neighboring school districts to share information, enhance response times, and facilitate seamless collaboration in ensuring campus safety.
- Implementation of Clear Signage and Expectations: Ensuring proper signage and communication of expectations for all after-school activities to visitors, parents, law enforcement, and staff.
- Enhancement of Parking Lot Safety: Ensuring well-lit, clearly marked, and monitored parking lots through the use of technology such as high-definition cameras, license plate reader (LPR) cameras, audio detection equipment, and designated points of contact equipped with emergency communication devices.
- Designation of Emergency Contacts: Designating a point of contact for each event equipped with emergency communication devices to facilitate quick response in case of emergencies.
- Monitoring of Campus with Technology: Integrating technology such as high-definition cameras to effectively monitor campus access points and feed live streams to responding law enforcement or EMS.

WHEREAS, Lowell Joint School District is applying for \$400,000.00 to assist with the goals and objectives stated above. The agreement would begin on October 1, 2025 and be valid for 36 months;

WHEREAS, the purpose of this agreement is to move forward with the SVPP - COPS funding opportunity;

THEREFORE, BE IT RESOLVED, that we, the Board of Trustees on behalf of the students, parents, and community at large, hereby approve the SVPP (School Violence Prevention Program) - COPS (Office of Community Oriented Policing Services) Funding Opportunity,

APPROVED AND ADOPTED this 4th day of August, 2025, by the following vote:

AYES:

NOES:

ABSTAIN:

ABSENT:

I, Jim Coombs, Secretary to the Board of Trustees of the Lowell Joint School District of Los Angeles and Orange Counties, California, hereby certify that the above and foregoing resolution was duly and regularly adopted by the said Board at a regular meeting thereof held on the 4th day of August, 2025, and passed by a unanimous vote of those present.

IN WITNESS WHEREOF, I have hereunto set my hand and seal this 4th day of August, 2025.

Jim Coombs
Secretary to the Board of Trustees

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Resolution 2025-26 #981 of the Board of Trustees of
the Lowell Joint School District Authorizing the
Issuance and Sale of Not to Exceed \$35,000,000
Aggregate Principal Amount of Bonds of the District,
by Public Sale, Approving the Form of a Continuing
Disclosure Certificate, an Official Statement and an
Official Notice of Sale for the Bonds, and Authorizing
Related Actions

ACTION/
(RESOLUTION)

Summary Statement:

On November 5, 2024, the voters of the District approved a measure authorizing the District to issue up to \$54,000,000 in aggregate principal amount of bonds for authorized projects.

The Board of Trustees is requested to approve the above-referenced resolution authorizing the District to issue its first series of bonds under the November 5, 2024, authorization in an aggregate principal amount not exceeding \$35,000,000 (the "Series 2025 Bonds").

The Series 2025 Bonds will be sold and issued by the District by a competitive sale. Fieldman, Rolapp & Associates, Inc., will serve as municipal advisor to the District with respect to the Series 2025 Bonds. Orrick, Herrington & Sutcliffe LLP will serve as bond counsel and disclosure counsel to the District with respect to the Series 2025 Bonds.

The Board of Trustees is asked to approve the resolution referenced above to affect the issuance of the Series 2025 Bonds and approve various documents and actions, as follows:

1. **Resolution.** The resolution authorizes the issuance of the Series 2025 Bonds and establishes parameters for the terms thereof, approves the forms of and authorizes the execution and delivery of the financing documents (including the Official Notice of Sale, the Notice of Intention to Sell Bonds, the Certificate of Award and the Continuing Disclosure Certificate), approves the form of and authorizes the distribution of the Official Statement (in

Superintendent's Comment:

ADOPTION BY MAJORITY ROLL CALL VOTE RECOMMENDED.

preliminary and final form), and sets forth the security provisions for the Series 2025 Bonds and the covenants of the District to bond owners.

2. **Official Notice of Sale.** The Official Notice of Sale invites bids for the public sale of the Series 2025 Bonds from bidders, and it describes the details of the bond sale, including the method of delivering bids and the date, time and place of the bid opening, the terms of the Series 2025 Bonds and the security therefor and any limitations on the interest rates or purchase price which may be bid for the Series 2025 Bonds.

3. **Notice of Intention to Sell Bonds.** The Notice of Intention to Sell Bonds is published prior to the sale date in accordance with State law and serves as a notice to potential bidders of the upcoming public sale of the Series 2025 Bonds.

4. **Certificate of Award.** The Certificate of Award is the document by which an authorized officer of the District awards the sale of the Series 2025 Bonds to the bidder with the lowest true interest cost bid.

5. **Continuing Disclosure Certificate.** Federal securities laws indirectly require school districts to disclose and annually update certain financial and operating information relevant to the security and repayment of the Series 2025 Bonds. The Continuing Disclosure Certificate contains the undertakings of the District to provide the ongoing disclosure in the form of annual reports and event notices.

6. **Official Statement.** The Official Statement (in its preliminary and final form) is used to provide information to investors and prospective investors about the District and the Series 2025 Bonds. The Series 2025 Bonds constitute securities for purposes of state and federal securities laws and, therefore, the offering and sale of the Series 2025 Bonds through the Official Statement is subject to certain provisions of such laws, including, importantly, the anti-fraud laws. The Official Statement sets forth information about the terms of the Series 2025 Bonds, the security for the Series 2025 Bonds, the sources and uses of the proceeds of the Series 2025 Bonds, the District and the tax base of the District, the documents under which the Series 2025 Bonds are issued, and the tax-exemption of interest on the Series 2025 Bonds.

As an elementary school district, the District may issue bonds in an amount up to 1.25% of the assessed valuation of taxable property within its boundaries. The District's fiscal year 2024-25 gross bonding capacity (also commonly referred to as the "bonding limit" or "debt limit") is approximately \$79.1 million and its net bonding capacity is approximately \$34.3 million (taking into account current outstanding debt before the issuance of the Series 2025 Bonds). It is anticipated that the District's net bonding capacity will increase to the allow for the issuance of the proposed \$35,000,000 of Series 2025 Bonds when the fiscal year 2025-26 equalized assessment roll is effective. To the extent the net capacity is not sufficient to issue the full \$35,000,000, the principal amount of the Series 2025 Bonds will be reduced.

Superintendent's Comment:

ADOPTION BY MAJORITY ROLL CALL VOTE RECOMMENDED.

Financial Implications:

The Series 2025 Bonds will be paid from taxes on property within the District levied and collected by the Counties of Orange and Los Angeles. The Series 2025 Bonds will finance projects authorized by the voters at the November 5, 2024, election.

Recommendation:

It is recommended that the Board of Trustees approve the attached resolution and authorize District officers and staff to take the necessary steps to complete the financing.

DB/ds

Attachments

Superintendent's Comment:

ADOPTION BY MAJORITY ROLL CALL VOTE RECOMMENDED.

**LOWELL JOINT SCHOOL DISTRICT
RESOLUTION 2025-2026 NO. 981
RESOLUTION OF THE BOARD OF TRUSTEES OF THE
LOWELL JOINT SCHOOL DISTRICT
OF LOS ANGELES AND ORANGE COUNTIES, CALIFORNIA,**

**RESOLUTION OF THE BOARD OF TRUSTEES OF THE LOWELL
JOINT SCHOOL DISTRICT AUTHORIZING THE ISSUANCE AND SALE
OF NOT TO EXCEED \$35,000,000 AGGREGATE PRINCIPAL AMOUNT
OF BONDS OF THE DISTRICT, BY PUBLIC SALE, APPROVING THE
FORM OF A CONTINUING DISCLOSURE CERTIFICATE, AN
OFFICIAL STATEMENT AND AN OFFICIAL NOTICE OF SALE FOR
THE BONDS, AND AUTHORIZING RELATED ACTIONS**

WHEREAS, an election was duly called and regularly held in the Lowell Joint School District (the “District”), located in the counties of Orange (“Orange County”) and Los Angeles (“Los Angeles County”), California, on November 5, 2024, at which the following proposition (as abbreviated pursuant to Section 13247 of the California Elections Code) was submitted to the electors of the District (the “Bond Measure”):

“To provide safe, modern elementary/intermediate schools; construct, repair/update classrooms, science labs/school facilities to support student achievement and college/career readiness in math, science, technology, arts/engineering; improve disabled student access; replace deteriorating portables with permanent classrooms; shall Lowell Joint School District’s measure authorizing \$54,000,000 in bonds, at legal rates, levying approximately \$30 per \$100,000 of assessed valuation (raising \$4,000,000 annually) while bonds are outstanding, be adopted, with citizen oversight, annual audits, all funds used locally?”

and

WHEREAS, passage of the Bond Measure required at least a 55% affirmative vote of the votes cast therein, and at least 55% of the votes cast on the Bond Measure were in favor of issuing said bonds; and

WHEREAS, at this time, the Board of Trustees of the District (the “Board of Trustees”) deems it necessary and desirable to authorize and consummate the sale of a portion of the bonds, designated the “Lowell Joint School District (Orange and Los Angeles Counties, California) General Obligation Bonds, Election of 2024, Series 2025” (the “Series 2025 Bonds”), with such additional or other series or subseries designations as may be approved as herein provided, in an aggregate principal amount not exceeding \$35,000,000, for purposes of financing projects authorized to be financed under the Bond Measure, according to the terms and in the manner hereinafter set forth; and

WHEREAS, the Board of Trustees further deems it necessary and desirable to authorize the issuance and sale of the Series 2025 Bonds by the District by public sale to the responsible bidder who makes the lowest true interest cost bid pursuant to an Official Notice of Sale (such Official Notice of Sale, in the form presented to this meeting, with such changes, insertions and omissions as are made pursuant to this Resolution, being referred to herein as the “Official Notice

of Sale”), pursuant to the authority of Article 4.5 of Chapter 3, of Part 1 of Division 2 of Title 5 of the California Government Code and other applicable law (collectively, the “Act”); and

WHEREAS, a form of Notice of Intention to Sell Bonds to be published in connection with the public offering and sale of the Series 2025 Bonds has been prepared (such Notice of Intention to Sell, in the form presented to this meeting, with such changes, insertions and omissions as are made pursuant to this Resolution, being referred to herein as the “Notice of Intention to Sell Bonds”); and

WHEREAS, a form of Certificate of Award to be completed upon the sale of the Series 2025 Bonds, in which the terms of said bonds shall be finally determined and the Series 2025 Bonds shall be awarded to the responsible bidder who makes the lowest true interest cost bid has been prepared (such Certificate of Award, in the form presented to this meeting, with such changes, insertions and omissions as are made pursuant to this Resolution, being referred to herein as the “Certificate of Award”); and

WHEREAS, the Board of Trustees has determined that enhancing the timely payment of the principal of and interest on the Series 2025 Bonds by obtaining a municipal bond insurance policy with respect thereto could be economically advantageous to the District; and

WHEREAS, Rule 15c2-12 promulgated under the Securities Exchange Act of 1934 (“Rule 15c2-12”) requires that, in order to be able to purchase or sell the Series 2025 Bonds, the underwriter thereof must have reasonably determined that the District has undertaken in a written agreement or contract for the benefit of the holders of the Series 2025 Bonds to provide disclosure of certain financial and operating information and certain enumerated events on an ongoing basis; and

WHEREAS, in order to cause such requirement to be satisfied, the District desires to execute and deliver a Continuing Disclosure Certificate (such Continuing Disclosure Certificate, in the form presented to this meeting, with such changes, insertions and omissions as are made pursuant to this Resolution, being referred to herein as the “Continuing Disclosure Certificate”), a form of which has been prepared; and

WHEREAS, the Preliminary Official Statement to be distributed in connection with the public offering of the Series 2025 Bonds has been prepared (such Preliminary Official Statement, in the form presented to this meeting, with such changes, insertions and omissions as are made pursuant to this Resolution, being referred to herein as the “Preliminary Official Statement”); and

WHEREAS, California Government Code Section 5852.1 and California Education Code Section 15146(b)(1)(D) require that the Board of Trustees obtain from an underwriter, financial advisor or private lender and disclose, prior to authorization of the issuance of bonds with a term of greater than 13 months, good faith estimates of the following information in a meeting open to the public: (a) the true interest cost of the bonds, (b) the sum of all fees and charges paid to third parties with respect to the bonds (or costs associated with the bonds as required under Section 15146(b)(1)(D) of the California Education Code), (c) the amount of proceeds of the bonds expected to be received net of the fees and charges paid to third parties and any reserves or capitalized interest paid or funded with proceeds of the bonds, and (d) the sum total of all debt

service payments on the bonds calculated to the final maturity of the bonds plus the fees and charges paid to third parties not paid with the proceeds of the bonds; and

WHEREAS, in compliance with California Government Code Section 5852.1 and California Education Code Section 15146(b)(1)(D), the Board of Trustees has obtained from Fieldman, Rolapp & Associates, Inc., as financial advisor under California Education Code Section 15146(b)(1)(C) and as municipal advisor under Section 15B of the Securities Exchange Act of 1934 (the "Municipal Advisor"), the required good faith estimates, including the costs associated with the Series 2025 Bonds, and such estimates are disclosed and set forth on Exhibit A attached hereto; and

WHEREAS, the District has previously adopted a local debt policy (the "Debt Management Policy") that complies with California Government Code Section 8855(i), and the District's sale and issuance of the Series 2025 Bonds as contemplated by this Resolution is in compliance with the Debt Management Policy; and

WHEREAS, the Board of Trustees has been presented with the form of each document referred to herein relating to the financing contemplated hereby, and the Board of Trustees has examined each document and desires to approve, authorize and direct the execution of such documents and the consummation of such financing; and

WHEREAS, the District desires that Orange County and Los Angeles County levy and collect a tax on all taxable property within the District sufficient to provide for payment of the Series 2025 Bonds, and intends by the adoption of this Resolution to notify the Board of Supervisors of Orange County, the Auditor-Controller of Orange County, the Treasurer-Tax Collector of Orange County, the Board of Supervisors of Los Angeles County, the Auditor-Controller of Los Angeles County, the Treasurer-Tax Collector of Los Angeles County and other officials of Orange County and Los Angeles County that they should take such actions as shall be necessary to provide for the levy and collection of such a tax and payment of principal of and interest on the Series 2025 Bonds, all pursuant to Sections 15250 and 15251 of the California Education Code; and

WHEREAS, all acts, conditions and things required by the Constitution and laws of the State of California to exist, to have happened and to have been performed precedent to and in connection with the consummation of the actions authorized hereby do exist, have happened and have been performed in regular and due time, form and manner as required by law, and the District is now duly authorized and empowered, pursuant to each and every requirement of law, to consummate such actions for the purpose, in the manner and upon the terms herein provided;

NOW, THEREFORE, BE IT RESOLVED by the Board of Trustees of the Lowell Joint School District, Orange and Los Angeles Counties, as follows:

Section 1. Recitals. All of the above recitals are true and correct and the Board of Trustees so finds and determines.

Section 2. Definitions. Unless the context clearly otherwise requires, the terms defined in this Section shall, for all purposes of this Resolution, have the meanings specified herein, to be equally applicable to both the singular and plural forms of any of the terms herein defined.

“Act” means Article 4.5 of Chapter 3, of Part 1 of Division 2 of Title 5 of the California Government Code and other applicable law.

“Auditor-Controller” means the Auditor-Controller of each County, as applicable, or any authorized deputy thereof.

“Authorized Officers” means the President of the Board of Trustees, or such other member of the Board of Trustees as the President may designate, the Superintendent of the District and the Assistant Superintendent, Business Services of the District, including anyone serving as an interim or provisional officer in such positions, and such other officer or employee of the District as the Superintendent may designate.

“Board of Supervisors” means the Board of Supervisors of each County, as applicable.

“Board of Trustees” means the Board of Trustees of the District.

“Bonds” means all bonds, including refunding bonds, of the District heretofore or hereafter issued pursuant to voter-approved measures of the District, including bonds approved by the voters of the District on November 6, 2018, and pursuant to the Bond Measure.

“Cede & Co.” means Cede & Co., the nominee of DTC, and any successor nominee of DTC with respect to the Series 2025 Bonds.

“Certificate of Award” means (a) the certificate of award to be completed upon the public sale of the Series 2025 Bonds, in which the terms of such Series 2025 Bonds shall be finally determined and such Series 2025 Bonds shall be awarded to the responsible bidder who makes the lowest true interest cost bid, or (b) to the extent that no bid is acceptable and an Authorized Officer determines it is in the best interest of the District to sell such Series 2025 Bonds by negotiated sale as permitted by law and Section 11(c) hereof, a bond purchase agreement entered into in conformity with the limitations, terms and conditions contained in this Resolution.

“Code” means the Internal Revenue Code of 1986.

“Continuing Disclosure Certificate” means the Continuing Disclosure Certificate executed and delivered by the District relating to the Series 2025 Bonds.

“County” or **“Counties”** means the County of Orange and the County of Los Angeles, as applicable, each a county and political subdivision of the State of California organized and existing under the laws of the State of California, and any successor thereto.

“District” means the Lowell Joint School District.

“DTC” means The Depository Trust Company, a limited-purpose trust company organized under the laws of the State of New York, and its successors as securities depository for the Series 2025 Bonds, including any such successor thereto appointed pursuant to Section 9 hereof.

“Interest Payment Date” means February 1 and August 1 of each year, commencing on February 1, 2026, or such other dates as may be set forth in the Certificate of Award.

“Investment Agreement” shall have the meaning set forth in Section 15 hereof.

“Municipal Advisor” means Fieldman, Rolapp & Associates, Inc., as financial advisor to the District under California Education Code Section 15146(b)(1)(C) and as municipal advisor to the District under Section 15B of the Securities Exchange Act of 1934.

“Notice of Intention to Sell Bonds” means the Notice of Intention to Sell Bonds to be published in connection with the public offering and sale of the Series 2025 Bonds by a public sale.

“Official Notice of Sale” means the Official Notice of Sale relating to the public sale of the Series 2025 Bonds executed by the District in accordance with the provisions hereof.

“Official Statement” means the Official Statement of the District relating to the Series 2025 Bonds.

“Opinion of Bond Counsel” means an opinion of counsel of nationally recognized standing in the field of law relating to municipal bonds.

“Owner” means, with respect to any Bond, including any Series 2025 Bond, the person whose name appears on the Registration Books as the registered owner thereof.

“Paying Agent” means U.S. Bank Trust Company, National Association, or the Treasurer of the County, the county superintendent of which has jurisdiction over the District, including his or her designated agents, or any bank, trust company, national banking association or other financial institution, appointed as Paying Agent to act as authenticating agent, bond registrar, transfer agent and paying agent for the Series 2025 Bonds in accordance with Section 8 hereof.

“Preliminary Official Statement” means the Preliminary Official Statement of the District relating to the Series 2025 Bonds.

“Record Date” means, with respect to any Interest Payment Date for Series 2025 Bonds, the 15th day of the calendar month immediately preceding such Interest Payment Date for such Series 2025 Bonds, whether or not such day is a business day, or such other date or dates as may be set forth in the Certificate of Award.

“Registration Books” means the books for the registration and transfer of the Series 2025 Bonds maintained by the Paying Agent in accordance with Section 8(d) hereof.

“Series 2025 Bonds” means the Bonds authorized and issued pursuant to this Resolution, in one or more series or subseries, designated the “Lowell Joint School District (Orange and Los Angeles Counties, California) General Obligation Bonds, Election of 2024, Series 2025,” with such additional or other series or subseries designations as may be approved as herein provided.

“State” means the State of California.

“Tax Certificate” means the Tax Certificate with respect to the Series 2025 Bonds not issued as Taxable Bonds, executed by the District, dated the date of issuance of such Series 2025 Bonds.

“Tax-Exempt” means, with respect to interest on any obligations of a state or local government, that such interest is excluded from the gross income of the holders thereof for federal income tax purposes, whether or not such interest is includable as an item of tax preference or otherwise includable directly or indirectly for purposes of calculating other tax liabilities, including any alternative minimum tax or environmental tax under the Code.

“Taxable Bonds” means those Series 2025 Bonds the interest on which is not Tax-Exempt.

“Treasurer” means the Treasurer-Tax Collector of Orange County and the Treasurer-Tax Collector of Los Angeles County, as applicable, or any authorized deputy thereof.

Section 3. Authorization and Designation of Bonds. The Series 2025 Bonds described herein are being issued pursuant to the authority of the Act, and other applicable provisions of law, including applicable provisions of the California Education Code. The Board of Trustees hereby authorizes the issuance and sale, by public sale, of not to exceed \$35,000,000 aggregate principal amount of Series 2025 Bonds. The Series 2025 Bonds may be issued in one or more series or subseries and shall be designated “Lowell Joint School District (Orange and Los Angeles Counties, California) General Obligation Bonds, Election of 2024, Series 2025,” with appropriate additional or other series or subseries designations as approved by an Authorized Officer. The Board of Trustees hereby finds and determines that the sale of the Series 2025 Bonds by public sale as contemplated herein will result in a competitive pricing for the Series 2025 Bonds and contribute to the District’s goal of achieving the lowest overall cost of funds. The proceeds of the Series 2025 Bonds, exclusive of any premium and accrued interest received by the District, shall be applied to finance projects authorized to be financed under the Bond Measure.

Section 4. Form of Bonds; Execution. (a) *Form of Series 2025 Bonds.* The Series 2025 Bonds shall be issued in fully registered form without coupons. The Series 2025 Bonds and the certificate of authentication and registration and the form of assignment to appear on each of them, shall be in substantially the form attached hereto as Exhibit B, with necessary or appropriate variations, omissions and insertions as permitted or required by this Resolution.

(b) *Execution of Bonds.* The Series 2025 Bonds shall be signed by the manual or facsimile signatures of the President of the Board of Trustees, and countersigned by the manual or facsimile signature of the Clerk or Secretary of the Board of Trustees (or the designee of any of such respective officers if any are unavailable). The Series 2025 Bonds shall be authenticated by a manual signature of a duly authorized signatory of the Paying Agent.

(c) *Valid Authentication.* Only such of the Series 2025 Bonds as shall bear thereon a certificate of authentication and registration as described in subsection (a) of this Section, executed by the Paying Agent, shall be valid or obligatory for any purpose or entitled to the benefits of this Resolution, and such certificate of authentication and registration shall be conclusive evidence that

the Series 2025 Bonds so authenticated have been duly authenticated and delivered hereunder and are entitled to the benefits of this Resolution.

(d) *Identifying Number.* The Paying Agent shall assign each Series 2025 Bond authenticated and registered by it a distinctive letter, or number, or letter and number, and shall maintain a record thereof at its principal office, which record shall be available to the District and the County, the county superintendent of which has jurisdiction over the District, for inspection.

Section 5. Terms of Bonds. (a) *Date of Series 2025 Bonds.* The Series 2025 Bonds shall be dated the date of their delivery, or such other date as shall be set forth in the Certificate of Award.

(b) *Denominations.* The Series 2025 Bonds shall be issued in denominations of \$5,000 principal amount or any integral multiple thereof.

(c) *Maturity.* The Series 2025 Bonds shall mature on the date or dates, in each of the years, in the principal amounts and in the aggregate principal amount as shall be set forth in the Certificate of Award. No Series 2025 Bond shall mature later than the date which is 30 years from the date of the Series 2025 Bonds, to be determined as provided in subsection (a) of this Section. No Series 2025 Bond shall have principal maturing on more than one principal maturity date.

(d) *Interest.* The Series 2025 Bonds shall bear interest at an interest rate or rates not to exceed 8.00% per annum, payable on the Interest Payment Dates in each year computed on the basis of a 360-day year of twelve 30-day months. Each Series 2025 Bond shall bear interest from the Interest Payment Date next preceding the date of authentication thereof, unless it is authenticated after the close of business on a Record Date and on or prior to the succeeding Interest Payment Date for such Series 2025 Bond, in which event it shall bear interest from such Interest Payment Date, or unless it is authenticated on or before the Record Date preceding the first Interest Payment Date for such Series 2025 Bond, in which event it shall bear interest from its dated date; provided, however, that if, at the time of authentication of any Series 2025 Bond, interest is in default on any outstanding Series 2025 Bonds, such Series 2025 Bond shall bear interest from the Interest Payment Date to which interest has previously been paid or made available for payment on the outstanding Series 2025 Bonds.

(e) *Interest; Tax-Exempt or Taxable.* Each series or subseries of the Series 2025 Bonds or portion thereof may be issued such that the interest on such series or subseries of the Series 2025 Bonds or portion thereof is Tax-Exempt or such that the interest on such series or subseries of Series 2025 Bonds or portion thereof is not Tax-Exempt. The Board of Trustees hereby finds and determines that, pursuant to Section 5903 of the California Government Code, the interest payable on each series or subseries of the Series 2025 Bonds or portion thereof issued as Taxable Bonds will be subject to federal income taxation under the Code in existence on the date of issuance of such series or subseries of Series 2025 Bonds.

Section 6. Payment of Bonds. (a) *Request for Tax Levy.* The money for the payment of principal, redemption premium, if any, and interest on the Series 2025 Bonds shall be raised by taxation upon all taxable property in the District and provision shall be made for the levy and collection of such taxes in the manner provided by law and for such payment out of the interest

and sinking fund of the District established for such Series 2025 Bonds. The Board of Supervisors and officers of each County are obligated by statute to provide for the levy and collection of property taxes in each year sufficient to pay all principal and interest coming due on the Series 2025 Bonds in such year, and to pay from such taxes all amounts due on the Series 2025 Bonds. The District hereby requests the Board of Supervisors of each County to annually levy a tax upon all taxable property in the District sufficient to redeem the Series 2025 Bonds, and to pay the principal, redemption premium, if any, and interest thereon, and all fees and expenses of the Paying Agent, insofar as permitted by law, including specifically by Section 15232 of the California Education Code, as and when the same become due.

(b) *Principal.* The principal of the Series 2025 Bonds shall be payable in lawful money of the United States of America to the Owner thereof, upon the surrender thereof at the principal corporate trust office of the Paying Agent.

(c) *Interest; Record Date.* The interest on the Series 2025 Bonds shall be payable on each Interest Payment Date in lawful money of the United States of America to the Owner thereof as of the Record Date preceding such Interest Payment Date, such interest to be paid by check or draft mailed on such Interest Payment Date (if a business day, or on the next business day if the Interest Payment Date does not fall on a business day) to such Owner at such Owner's address as it appears on the Registration Books or at such address as the Owner may have filed with the Paying Agent for that purpose except that the payment shall be made by wire transfer of immediately available funds to any Owner of at least \$1,000,000 of outstanding Series 2025 Bonds who shall have requested in writing such method of payment of interest prior to the close of business on the Record Date immediately preceding any Interest Payment Date.

(d) *Interest and Sinking Fund.* Principal and interest due on the Series 2025 Bonds shall be paid from the interest and sinking fund of the District established for such Series 2025 Bonds as provided in Section 15146 of the California Education Code.

(e) *Obligation of the District.* No part of any fund or account of either County is pledged or obligated to the payment of the Series 2025 Bonds. The obligation for repayment of the Series 2025 Bonds is the sole obligation of the District.

(f) *Pledge of, Lien on and Security Interest in Taxes.* The District hereby pledges, and grants a lien on and security interest in, all revenues from the property taxes collected from the levy by the Board of Supervisors of each County with respect to each voter-approved bond measure of the District for the payment of Bonds issued under such bond measure and all amounts on deposit in any interest and sinking fund of the District related to such bond measure with respect to the Bonds of such bond measure, in order to secure the payment of the principal or redemption price of and interest on such Bonds. This pledge and grant shall be valid and binding from the date hereof for the benefit of the Owners of the Bonds and successors thereto. The property taxes and amounts held in any interest and sinking fund of the District shall be immediately subject to this pledge and grant, and the pledge and grant shall constitute a lien and security interest which shall immediately attach to (i) the property taxes and (ii) the amounts held in any interest and sinking fund of the District. This pledge and grant shall secure the payment of such Bonds and shall be effective, binding, and enforceable against the District, its successors, creditors and all others irrespective of whether those parties have notice of the pledge or grant and without the need of any

physical delivery, recordation, filing, or further act. The pledge and grant is an agreement between the District and the Owners of Bonds to provide security for the Bonds in addition to any statutory lien that may exist, and the Bonds secured by the pledge and grant are or were issued to finance one or more of the projects specified in the applicable voter-approved measure.

(g) *Insurance.* The payment of principal of and interest on all or a portion of the Series 2025 Bonds may be enhanced by a municipal bond insurance policy as shall be described in the Certificate of Award. The Certificate of Award may provide that no municipal bond insurance policy shall be obtained. The Authorized Officers are each hereby authorized to qualify the District for municipal bond insurance for the Series 2025 Bonds and, if deemed to be in the best interests of the District, to obtain such insurance if the present value cost of such insurance is less than the present value of the estimated interest savings with respect to the Series 2025 Bonds. The Authorized Officers are each hereby authorized, for and in the name and on behalf of the District, to execute and deliver a contract or contracts for such insurance if such contract is deemed by the Authorized Officer executing the same to be in the best interests of the District, such determination to be conclusively evidenced by such Authorized Officer's execution and delivery of such contract. If the Authorized Officers so deem and obtain municipal bond insurance, and such insurance is issued by a mutual insurance company, the Authorized Officers are each hereby authorized to enter into any required mutual insurance agreement substantially in such insurer's standard form with such changes, insertions and omissions therein as the Authorized Officer executing the same may require or approve, such requirement or approval to be conclusively evidenced by the execution of such agreement by such Authorized Officer. The Authorized Officers may also provide in the Official Notice of Sale that obtaining municipal bond insurance for the Series 2025 Bonds is at the bidder's option.

Section 7. Redemption Provisions. (a) *Optional Redemption.* The Series 2025 Bonds may be subject to redemption, at the option of the District, on the dates and terms as shall be designated in the Certificate of Award. The Certificate of Award may provide that the Series 2025 Bonds shall not be subject to optional redemption.

(b) *Selection.* If less than all of the Series 2025 Bonds, if any, are subject to such redemption and are called for redemption, such Series 2025 Bonds shall be redeemed in inverse order of maturities or as otherwise directed by the District (or as otherwise set forth in the Certificate of Award), and if less than all of the Series 2025 Bonds of any given maturity are called for redemption, the portions of such Series 2025 Bonds of a given maturity to be redeemed shall be determined by lot in any manner deemed fair by the Paying Agent (or as otherwise set forth in the Certificate of Award).

(c) *Mandatory Sinking Fund Redemption.* The Series 2025 Bonds, if any, which are designated in the Certificate of Award as term bonds shall also be subject to redemption prior to their stated maturity dates, without a redemption premium, in part by lot (or as otherwise set forth in the Certificate of Award), from mandatory sinking fund payments in the amounts and in accordance with the terms to be specified in the Certificate of Award. Unless otherwise provided in the Certificate of Award, the principal amount of each mandatory sinking fund payment of any maturity shall be reduced proportionately or as otherwise directed by the District by the amount of any Series 2025 Bonds of that maturity redeemed in accordance with subsection (a) of this Section prior to the mandatory sinking fund payment date. The Certificate of Award may provide that the

Series 2025 Bonds shall not be subject to mandatory sinking fund redemption. The Auditor-Controller is hereby authorized to create such sinking funds or accounts for the term Series 2025 Bonds as shall be necessary to accomplish the purposes of this Section.

(d) *Notice of Redemption.* Notice of any redemption of the Series 2025 Bonds shall be mailed by the Paying Agent, postage prepaid, not less than 20 nor more than 60 days prior to the redemption date (i) by first class mail to the County, the county superintendent of which has jurisdiction over the District, and the respective Owners thereof at the addresses appearing on the Registration Books, and (ii) as may be further required in accordance with the Continuing Disclosure Certificate.

Each notice of redemption shall state (i) the date of such notice; (ii) the name of the Series 2025 Bonds and the date of issue of the Series 2025 Bonds; (iii) the redemption date; (iv) the redemption price; (v) the series of Series 2025 Bonds and the dates of maturity or maturities of Series 2025 Bonds to be redeemed; (vi) if less than all of the Series 2025 Bonds of a series of any maturity are to be redeemed, the distinctive numbers of the Series 2025 Bonds of each maturity of such series to be redeemed; (vii) in the case of Series 2025 Bonds of a series redeemed in part only, the respective portions of the principal amount of the Series 2025 Bonds of each maturity of such series to be redeemed; (viii) the CUSIP number, if any, of each maturity of Series 2025 Bonds of a series to be redeemed; (ix) a statement that such Series 2025 Bonds must be surrendered by the Owners at the principal corporate trust office of the Paying Agent, or at such other place or places designated by the Paying Agent; (x) notice that further interest on such Series 2025 Bonds will not accrue after the designated redemption date; and (xi) in the case of a conditional notice, that such notice is conditioned upon certain circumstances and the manner of rescinding such conditional notice.

(e) *Effect of Notice.* A certificate of the Paying Agent that notice of redemption has been given to Owners as herein provided shall be conclusive as against all parties. Neither the failure to receive the notice of redemption as provided in this Section, nor any defect in such notice shall affect the sufficiency of the proceedings for the redemption of the Series 2025 Bonds or the cessation of interest on the date fixed for redemption.

When notice of redemption has been given substantially as provided for herein, and when the redemption price of the Series 2025 Bonds called for redemption is set aside for the purpose as described in subsection (g) of this Section, the Series 2025 Bonds designated for redemption shall become due and payable on the specified redemption date and interest shall cease to accrue thereon as of the redemption date, and upon presentation and surrender of such Series 2025 Bonds at the place specified in the notice of redemption, such Series 2025 Bonds shall be redeemed and paid at the redemption price thereof out of the money provided therefor. The Owners of such Series 2025 Bonds so called for redemption after such redemption date shall be entitled to payment thereof only from the interest and sinking fund or the trust fund established for such purpose. All Series 2025 Bonds redeemed shall be cancelled forthwith by the Paying Agent and shall not be reissued.

(f) *Right to Rescind Notice.* The District may rescind any optional redemption and notice thereof for any reason on any date prior to the date fixed for redemption by causing written notice of the rescission to be given to the Owners of the Series 2025 Bonds so called for

redemption. Any optional redemption and notice thereof shall be rescinded if for any reason on the date fixed for redemption moneys are not available in the interest and sinking fund established for the Series 2025 Bonds or otherwise held in trust for such purpose in an amount sufficient to pay in full on said date the principal of, interest, and any premium due on the Series 2025 Bonds called for redemption. Notice of rescission of redemption shall be given in the same manner in which notice of redemption was originally given. The actual receipt by the Owner of any Series 2025 Bond of notice of such rescission shall not be a condition precedent to rescission, and failure to receive such notice or any defect in such notice shall not affect the validity of the rescission.

(g) *Funds for Redemption.* Prior to or on the redemption date of any Series 2025 Bonds there shall be available in the interest and sinking fund of the District established for the Series 2025 Bonds, or held in trust for such purpose as provided by law, monies for the purpose and sufficient to redeem, at the redemption prices as in this Resolution provided, the Series 2025 Bonds designated in the notice of redemption. Such monies shall be applied on or after the redemption date solely for payment of principal of, interest and premium, if any, on the Series 2025 Bonds to be redeemed upon presentation and surrender of such Series 2025 Bonds, provided that all monies in the interest and sinking fund of the District established for the Series 2025 Bonds shall be used for the purposes established and permitted by law. Any interest due on or prior to the redemption date shall be paid from the interest and sinking fund of the District established for the Series 2025 Bonds, unless otherwise provided to be paid from such monies held in trust. If, after all of the Series 2025 Bonds have been redeemed and cancelled or paid and cancelled, there are monies remaining in the interest and sinking fund of the District established for the Series 2025 Bonds or otherwise held in trust for the payment of the redemption price of the Series 2025 Bonds, the monies shall be held in or returned or transferred to any interest and sinking fund of the District for payment of any outstanding Bonds of the District payable from such fund; provided, however, that if the monies are part of the proceeds of Bonds of the District, the monies shall be transferred to the fund created for the payment of principal of and interest on such Bonds. If no such Bonds of the District are at such time outstanding, the monies shall be transferred to the general fund of the District as provided and permitted by law.

(h) *Defeasance of Bonds.* If at any time the District shall pay or cause to be paid or there shall otherwise be paid to the Owners of any or all of the outstanding Series 2025 Bonds all or any part of the principal, interest and premium, if any, on the Series 2025 Bonds at the times and in the manner provided herein and in the Series 2025 Bonds, or as provided in the following paragraph, or as otherwise provided by law consistent herewith, then such Owners shall cease to be entitled to the obligation of the District and each County as provided in Section 6 hereof, and such obligation and all agreements and covenants of the District to such Owners hereunder and under the Series 2025 Bonds shall thereupon be satisfied and discharged and shall terminate, except only that the District shall remain liable for payment of all principal, interest and premium, if any, represented by the Series 2025 Bonds, but only out of monies on deposit in the interest and sinking fund established for the Series 2025 Bonds or otherwise held in trust for such payment; and provided further, however, that the provisions of subsection (i) of this Section shall apply in all events.

For purposes of this Section, the District may pay and discharge any or all of the Series 2025 Bonds by depositing in trust with the Paying Agent, or an escrow agent selected by the District, at or before maturity, money or non-callable direct obligations of the United States of

America (including zero interest bearing State and Local Government Series) or other non-callable obligations the payment of the principal of and interest on which is guaranteed by a pledge of the full faith and credit of the United States of America, in an amount which will, together with the interest to accrue thereon and available monies then on deposit in the interest and sinking fund of the District established for the Series 2025 Bonds, be fully sufficient to pay and discharge the indebtedness on such Series 2025 Bonds (including all principal, interest and redemption premiums) at or before their respective maturity dates.

(i) *Unclaimed Monies.* Any money held in any fund created pursuant to this Resolution, or by the Paying Agent or an escrow agent in trust, for the payment of the principal of, redemption premium, if any, or interest on the Series 2025 Bonds and remaining unclaimed for two years after the principal of all of the Series 2025 Bonds has become due and payable (whether by maturity or upon prior redemption) shall be transferred to any interest and sinking fund of the District for payment of any outstanding Bonds of the District payable from the fund; or, if no such Bonds of the District are at such time outstanding, the monies shall be transferred to the general fund of the District as provided and permitted by law.

Section 8. Paying Agent. (a) *Appointment; Payment of Fees and Expenses.* This Board of Trustees does hereby consent to and confirm the appointment of U.S. Bank Trust Company, National Association, to act as the initial paying agent for the Series 2025 Bonds. All fees and expenses of the Paying Agent shall be the sole responsibility of the District, and to the extent not paid from the proceeds of sale of the Series 2025 Bonds, or from the interest and sinking fund of the District established for the Series 2025 Bonds, insofar as permitted by law, including specifically by Section 15232 of the California Education Code, such fees and expenses shall be paid by the District.

(b) *Resignation, Removal and Replacement of Paying Agent.* The Paying Agent initially appointed or any successor Paying Agent may resign from service as Paying Agent and may be removed at any time by the District as provided in the Paying Agent's service agreement. If at any time the Paying Agent shall resign or be removed, the District shall appoint a successor Paying Agent, which shall be the Treasurer of the County, the county superintendent of which has jurisdiction over the District, including his or her designated agents and any third party that such Treasurer contracts with to perform the services of Paying Agent under this Resolution, or any bank, trust company, national banking association or other financial institution, doing business in and having a corporate trust office in California, with at least \$100,000,000 in net assets.

(c) *Principal Corporate Trust Office.* The initial Paying Agent, and any successor Paying Agent, shall designate each place or places where it will conduct the functions of transfer, registration, exchange, payment, and surrender of the Series 2025 Bonds, and any reference herein to the "principal corporate trust office" of the Paying Agent shall mean the office so designated for a particular purpose, which includes the office of the Treasurer of the County, the county superintendent of which has jurisdiction over the District, or the office of such Treasurer's designated agents, if such Treasurer is acting in the capacity of Paying Agent. If no office is so designated for a particular purpose, such functions shall be conducted at the office of U.S. Bank Trust Company, National Association, in Los Angeles, California, or the principal corporate trust office of any successor Paying Agent.

(d) *Registration Books.* The Paying Agent shall keep or cause to be kept at its principal corporate trust office, sufficient books for the registration and transfer of the Series 2025 Bonds, which shall at all times be open to inspection by the District and the County, the county superintendent of which has jurisdiction over the District, and, upon presentation for such purpose, the Paying Agent shall, under such reasonable regulations as it may prescribe, register or transfer or cause to be registered or transferred on the Registration Books, Series 2025 Bonds as provided in Sections 9 and 10 hereof. The Paying Agent shall keep accurate records of all funds administered by it and of all Series 2025 Bonds paid and discharged by it. Such records shall be provided, upon reasonable request, to the District in a format mutually agreeable to the Paying Agent and the District.

(e) *Merger or Consolidation.* Any bank, national banking association or trust company into which the Paying Agent may be merged or converted or with which it may be consolidated or any bank, national banking association or trust company resulting from any merger, conversion or consolidation to which it shall be a party or any bank, national banking association or trust company to which the Paying Agent may sell or transfer all or substantially all of its corporate trust business, provided such bank, national banking association or trust company shall be eligible under subsection (b) of this Section shall be the successor to such Paying Agent, without the execution or filing of any instrument or any further act, deed or conveyance on the part of any of the parties hereto, anything herein to the contrary notwithstanding.

Section 9. Transfer Under Book-Entry System; Discontinuation of Book-Entry System. (a) *Appointment of Depository; Book-Entry System.* Unless otherwise specified in the Certificate of Award, DTC is hereby appointed depository for each series of the Series 2025 Bonds and the Series 2025 Bonds shall be issued in book-entry form only, and shall be initially registered in the name of "Cede & Co.," as nominee of DTC. One bond certificate shall be issued for each maturity of each series or subseries of the Series 2025 Bonds; provided, however, that if different CUSIP numbers are assigned to Series 2025 Bonds of a series or subseries maturing in a single year or, if Series 2025 Bonds of the same series or subseries maturing in a single year are issued with different interest rates, additional bond certificates shall be prepared for each such maturity. Registered ownership of such Series 2025 Bonds of each such maturity, or any portion thereof, may not thereafter be transferred except as provided in this Section or Section 10 hereof:

(i) To any successor of DTC, or its nominee, or to any substitute depository designated pursuant to clause (ii) of this Section (a "substitute depository"); provided, however that any successor of DTC, as nominee of DTC or substitute depository, shall be qualified under any applicable laws to provide the services proposed to be provided by it;

(ii) To any substitute depository not objected to by the District, upon (1) the resignation of DTC or its successor (or any substitute depository or its successor) from its functions as depository, or (2) a determination by the District to substitute another depository for DTC (or its successor) because DTC or its successor (or any substitute depository or its successor) is no longer able to carry out its functions as depository; provided, that any such substitute depository shall be qualified under any applicable laws to provide the services proposed to be provided by it; or

(iii) To any person as provided below, upon (1) the resignation of DTC or its successor (or substitute depository or its successor) from its functions as depository; provided that no substitute depository which is not objected to by the District can be obtained, or (2) a determination by the District that it is in the best interests of the District to remove DTC or its successor (or any substitute depository or its successor) from its functions as depository.

(b) *Transfers.* In the case of any transfer pursuant to clause (i) or clause (ii) of subsection (a) of this Section, upon receipt of the outstanding Series 2025 Bonds by the Paying Agent, together with a written request of the District to the Paying Agent, a new Series 2025 Bond for each maturity shall be executed and delivered (in the aggregate principal amount of such Series 2025 Bonds then outstanding), registered in the name of such successor or such substitute depository, or their nominees, as the case may be, all as specified in such written request of the District. In the case of any transfer pursuant to clause (iii) of subsection (a) of this Section, upon receipt of the outstanding Series 2025 Bonds by the Paying Agent together with a written request of the District to the Paying Agent, new Series 2025 Bonds shall be executed and delivered in such denominations, numbered in the manner determined by the Paying Agent, and registered in the names of such persons, as are requested in such written request of the District, subject to the limitations of Section 5 hereof and the receipt of such a written request of the District, and thereafter, the Series 2025 Bonds shall be transferred pursuant to the provisions set forth in Section 10 hereof; provided, however, that the Paying Agent shall not be required to deliver such new Series 2025 Bonds within a period of less than 60 days after the receipt of any such written request of the District.

(c) *Partial or Advance Refundings.* In the case of partial redemption or an advance refunding of the Series 2025 Bonds evidencing all or a portion of the principal amount then outstanding, DTC shall make an appropriate notation on the Series 2025 Bonds indicating the date and amounts of such reduction in principal.

(d) *Treatment of Registered Owner.* The District and the Paying Agent shall be entitled to treat the person in whose name any Series 2025 Bond is registered as the owner thereof, notwithstanding any notice to the contrary received by the District or the Paying Agent; and the District and the Paying Agent shall have no responsibility for transmitting payments to, communicating with, notifying, or otherwise dealing with any beneficial owners of the Series 2025 Bonds, and neither the District nor the Paying Agent shall have any responsibility or obligation, legal or otherwise, to the beneficial owners or to any other party, including DTC or its successor (or substitute depository or its successor), except for the Owner of any Series 2025 Bonds.

(e) *Form of Payment.* So long as the outstanding Series 2025 Bonds are registered in the name of Cede & Co. or its registered assigns, the District and the Paying Agent shall cooperate with Cede & Co., as sole registered Owner, or its registered assigns in effecting payment of the principal of and interest on the Series 2025 Bonds by arranging for payment in such manner that funds for such payments are properly identified and are made immediately available on the date they are due.

Section 10. Transfer and Exchange. (a) *Transfer.* Following the termination or removal of DTC or successor depository pursuant to Section 9 hereof, any Series 2025 Bond may, in

accordance with its terms, be transferred, upon the Registration Books, by the Owner thereof, in person or by the duly authorized attorney of such Owner, upon surrender of such Series 2025 Bond to the Paying Agent for cancellation, accompanied by delivery of a duly executed written instrument of transfer in a form approved by the Paying Agent.

Whenever any Series 2025 Bond or Series 2025 Bonds shall be surrendered for transfer, the designated District officials shall execute and the Paying Agent shall authenticate and deliver, as provided in Section 4 hereof, a new Series 2025 Bond or Series 2025 Bonds, of the same series, maturity, Interest Payment Date and interest rate or rates (for a like aggregate principal amount). The Paying Agent may require the payment by any Owner of Series 2025 Bonds requesting any such transfer of any tax or other governmental charge required to be paid with respect to such transfer.

No transfer of any Series 2025 Bond shall be required to be made by the Paying Agent (i) during the period established by the Paying Agent for selection of the Series 2025 Bonds for redemption, and (ii) after any Series 2025 Bond has been selected for redemption.

(b) *Exchange.* The Series 2025 Bonds may be exchanged for Series 2025 Bonds of other authorized denominations of the same series, maturity, Interest Payment Date and interest rate or rates, by the Owner thereof, in person or by the duly authorized attorney of such Owner, upon surrender of such Series 2025 Bond to the Paying Agent for cancellation, accompanied by delivery of a duly executed request for exchange in a form approved by the Paying Agent.

Whenever any Series 2025 Bond or Series 2025 Bonds shall be surrendered for exchange, the designated District officials shall execute and the Paying Agent shall authenticate and deliver, as provided in Section 4 hereof, a new Series 2025 Bond or Series 2025 Bonds of the same series, maturity and interest payment mode and interest rate or rates (for a like aggregate principal amount). The Paying Agent may require the payment by the Owner requesting such exchange of any tax or other governmental charge required to be paid with respect to such exchange.

No exchange of any Series 2025 Bonds shall be required to be made by the Paying Agent (i) during the period established by the Paying Agent for selection of the Series 2025 Bonds for redemption, and (ii) after any Series 2025 Bond has been selected for redemption.

Section 11. Sale of Bonds. (a) *Official Notice of Sale; Date of Sale.* The Official Notice of Sale inviting bids for the public sale of the Series 2025 Bonds, in substantially the form submitted to this meeting and made a part hereof as though set forth herein, with such changes, insertions and omissions therein as may be approved by an Authorized Officer, be and the same is hereby approved, and the Authorized Officers are, and each of them is, hereby authorized, and any one of the Authorized Officers is hereby directed, to cause the Official Notice of Sale to be completed, upon consultation with the District's Municipal Advisor, by inserting therein the maturity schedules for the Series 2025 Bonds, and making such other changes, insertions and omissions as deemed necessary. The Authorized Officers are, and each of them is, hereby authorized, and any one of the Authorized Officers is hereby directed, to execute the Official Notice of Sale in its final form, and any amendment or supplement thereto, for and in the name of the District, and the use of the Official Notice of Sale in connection with the offering and public sale of the Series 2025 Bonds is hereby authorized and approved. Bids for the Series 2025 Bonds

shall be received on behalf of this Board of Trustees on such date as shall be determined by an Authorized Officer, at the hour and place designated in the Official Notice of Sale.

(b) *Advertisement for Bids.* The Notice of Intention to Sell Bonds, in substantially the form submitted to this meeting and made a part hereof as though set forth herein, is hereby approved, and the Authorized Officers are each hereby authorized and directed to cause the Notice of Intention to Sell Bonds, subject to such changes, insertions and omissions thereto as shall be deemed necessary, to be published before the date of public sale of the Series 2025 Bonds in accordance with State law and the Act, and such publication is hereby expressly ratified and approved.

(c) *Award of Public Sale Bonds; Certificate of Award.* The Authorized Officers are, and each of them is, hereby authorized, and any one of the Authorized Officers is hereby directed, to entertain bids for the Series 2025 Bonds sold by public sale, and to accept the lowest true interest cost bid and, if such true interest cost is acceptable to such Authorized Officer, to award the sale of the Series 2025 Bonds by executing the Certificate of Award, in substantially the form submitted to this meeting and made a part hereof as though set forth herein, naming the successful bidder and determining all remaining terms of the Series 2025 Bonds, and such execution shall constitute conclusive evidence of the approval of the Authorized Officer of the terms of the Series 2025 Bonds and the sale thereof; provided that (i) the true interest cost shall not be in excess of 6.50%, calculated as specified in the Official Notice of Sale, (ii) the minimum price to be paid for the Series 2025 Bonds shall not be less than the principal amount thereof, plus accrued interest, if any, to the date of delivery, (iii) the ratio of total debt service to principal of the Series 2025 Bonds shall not exceed four to one, (iv) the underwriter's discount for the sale of the Series 2025 Bonds shall not exceed 2.00% of the principal amount of such Series 2025 Bonds (exclusive of any costs of issuance the successful bidder is obligated to pay), and (v) the Series 2025 Bonds shall otherwise conform to the limitations specified herein.

The Certificate of Award shall recite the aggregate principal amount of the Series 2025 Bonds, the date thereof, the maturity dates, principal amounts and annual rates of interest of each maturity thereof, the initial and semiannual Interest Payment Dates thereof, and the terms of optional and mandatory sinking fund redemption thereof, if any.

If no bid is acceptable, the Authorized Officers are, and each of them is, hereby authorized, and any one of the Authorized Officers is hereby directed, to reject all bids and to re-bid the Series 2025 Bonds or, if an Authorized Officer determines it in the best interest of the District, to sell such Series 2025 Bonds by negotiated sale as permitted by law, upon terms and conditions and otherwise in conformity with the limitations contained in this Resolution.

(d) *Reserves and Capitalized Interest.* In accordance with subsections (i) and (j) of Section 15146 of the California Education Code, the Authorized Officers are each hereby authorized to cause to be deposited in the interest and sinking fund of the District established for the Series 2025 Bonds proceeds of sale of the Series 2025 Bonds (in addition to any premium or accrued interest received) to fund (i) an annual reserve permitted by Section 15250 of the California Education Code, and/or (ii) capitalized interest in an amount not exceeding the interest scheduled to become due on the Series 2025 Bonds for a period of two years from the date of issuance of the Series 2025 Bonds, as shall be set forth in the Certificate of Award, if any such a

deposit is deemed by the Authorized Officer executing the same to be in the best interests of the District.

(e) *Good Faith Estimates.* In accordance with California Government Code Section 5852.1 and subsection (b)(1)(D) of Section 15146 of the California Education Code, good faith estimates of the following have been obtained from the Municipal Advisor and are set forth on Exhibit A attached hereto: (i) the true interest cost of the Series 2025 Bonds, (ii) the sum of all fees and charges paid to third parties with respect to the Series 2025 Bonds, (iii) the amount of proceeds of the Series 2025 Bonds expected to be received net of the fees and charges paid to third parties and any reserves or capitalized interest paid or funded with proceeds of the Series 2025 Bonds, and (iv) the sum total of all debt service payments on the Series 2025 Bonds calculated to the final maturity of the Series 2025 Bonds plus the fees and charges paid to third parties not paid with the proceeds of the Series 2025 Bonds. In accordance with Section 15146(d) of the California Education Code, the actual costs associated with the issuance of the Series 2025 Bonds shall be presented to this Board of Trustees at its next scheduled public meeting following the sale of the Series 2025 Bonds.

(f) *Costs of Issuance.* In accordance with subsection (h) of Section 15146 of the California Education Code, the Authorized Officers are each hereby authorized to cause to be deposited in a costs of issuance account, which may be held by a bank, national banking association or trust company meeting the qualifications necessary to be a paying agent set forth in Section 8, as cost of issuance administrator, proceeds of sale of the Series 2025 Bonds (exclusive of any premium or accrued interest received) in an amount not exceeding 2.00% of the principal amount of the Series 2025 Bonds sold, as shall be set forth in the Certificate of Award, for the purposes of paying the costs associated with the issuance of the Series 2025 Bonds. Such costs, as provided for in subsection (a) of Section 15145(a) of the California Education Code, include but are not limited to, fees of an independent financial consultant, the preparation, printing and distribution of an official statement, the obtaining of a rating, the purchase of insurance insuring the prompt payment of interest and principal, the preparation of the certified copy of the bond transcript, the printing of the Series 2025 Bonds, and legal fees of independent bond counsel retained by the District.

Section 12. Continuing Disclosure Certificate. The Continuing Disclosure Certificate, in substantially the form submitted to this meeting and made a part hereof as though set forth herein, is hereby approved, and the Authorized Officers are each hereby authorized and directed, for and in the name and on behalf of the District, to execute and deliver the Continuing Disclosure Certificate in substantially said form, as is necessary to cause the requirements of Rule 15c2-12 to be satisfied, with such changes, insertions and omissions as the Authorized Officer executing the same may require or approve, such determination, requirement or approval to be conclusively evidenced by the execution of the Continuing Disclosure Certificate by such Authorized Officer.

Section 13. Preliminary Official Statement. The Preliminary Official Statement to be distributed in connection with the public offering of the Series 2025 Bonds, in substantially the form submitted to this meeting and made a part hereof as though set forth herein, with such changes, insertions and omissions as may be approved by an Authorized Officer, is hereby approved, and the use of such Preliminary Official Statement in connection with the offering and sale of the Series 2025 Bonds is hereby authorized and approved. The Authorized Officers are

each hereby authorized to certify on behalf of the District that such Preliminary Official Statement is deemed final as of its date, within the meaning of Rule 15c2-12 (except for the omission of certain final pricing, rating and related information as permitted by Rule 15c2-12). If and to the extent it is necessary to make substantial changes to the Preliminary Official Statement prior to the offering and sale of the Series 2025 Bonds, the use of the Preliminary Official Statement in connection with the offering and sale of the Series 2025 Bonds, and the certification of its finality within the meaning of Rule 15c2-12 by an Authorized Officer, shall follow the distribution to the Board of Trustees of a revised draft of the Preliminary Official Statement with accompanying directions and instructions to members of the Board of Trustees to review the revised Preliminary Official Statement and provide comments to such Authorized Officer.

Section 14. Official Statement. The preparation and delivery of an Official Statement with respect to the Series 2025 Bonds, and its use in connection with the offering and sale of the Series 2025 Bonds, is hereby authorized and approved. Such Official Statement shall be in substantially the form of the Preliminary Official Statement distributed in connection with the public offering of the Series 2025 Bonds with such changes, insertions and omissions as may be approved by an Authorized Officer, such approval to be conclusively evidenced by the execution and delivery thereof. The Authorized Officers are each hereby authorized and directed, for and in the name of and on behalf of the District, to execute the final Official Statement with respect to the Series 2025 Bonds and any amendment or supplement thereto and thereupon to cause such final Official Statement and any such amendment or supplement to be delivered.

Section 15. Investment of Proceeds. (a) *Deposit of Proceeds.* As provided in subsection (g) of Section 15146 of the California Education Code, (i) except as permitted by subsections (h), (i) or (j) of Section 15146 of the California Education Code, the proceeds of the sale of the Series 2025 Bonds, exclusive of any premium or accrued interest received by the District, shall be deposited in the County treasury, the county superintendent of which has jurisdiction over the District, to the credit of the building fund of the District established for the Series 2025 Bonds, (ii) the proceeds deposited in the building fund of the District established for the Series 2025 Bonds shall be drawn out as other school moneys are drawn out, and (iii) the bond proceeds withdrawn shall not be applied to any purposes other than those for which the Series 2025 Bonds were issued. Amounts in the building fund of the District established for the Series 2025 Bonds shall be invested so as to be available for the aforementioned disbursements and the District shall keep a written record of such disbursements. In accordance with subsection (g) of Section 15146 of the California Education Code, at no time shall the proceeds of the Series 2025 Bonds be withdrawn by the District for investment outside the County treasury, the county superintendent of which has jurisdiction over the District. Pursuant to subsection (g) of Section 15146 of the California Education Code, any premium or accrued interest received by the District from the sale of the Series 2025 Bonds, shall be deposited in the interest and sinking fund of the District established for the Series 2025 Bonds.

(b) *Investment of Proceeds.* All funds held in the interest and sinking fund of the District established for the Series 2025 Bonds shall be invested at the discretion of the Treasurer of the County, the county superintendent of which has jurisdiction over the District, pursuant to State law, including California Government Code Section 53601 *et. seq.*, and the investment policy of the County, the county superintendent of which has jurisdiction over the District, as either may be amended or supplemented from time to time. Proceeds of the Series 2025 Bonds held in the

building fund of the District established for the Series 2025 Bonds shall be invested at the discretion of the Treasurer of the County, the county superintendent of which has jurisdiction over the District, pursuant to State law, including California Government Code Section 53601 *et. seq.*, and the investment policy of the County, the county superintendent of which has jurisdiction over the District, as either may be amended or supplemented from time to time.

(c) *Investment Agreements.* To the extent permitted by law, at the written request of an Authorized Officer, each of whom is hereby expressly authorized to make such request, all or any portion of the building fund of the District established for the Series 2025 Bonds may be invested, on behalf of the District, in investment agreements, including guaranteed investment contracts, float contracts or other investment products (collectively, "Investment Agreements"), which comply with the requirements of each rating agency then rating the Series 2025 Bonds necessary in order to maintain the then-current rating on the Series 2025 Bonds. Pursuant to Section 5922 of the California Government Code, the Board of Trustees hereby finds and determines that the Investment Agreements will reduce the amount and duration of interest rate risk with respect to amounts invested pursuant to the Investment Agreements and are designed to reduce the amount or duration of payment, rate, spread or similar risk or result in a lower cost of borrowing when used in combination with the Series 2025 Bonds or enhance the relationship between risk and return with respect to investments of proceeds of the Series 2025 Bonds and funds held to pay the Series 2025 Bonds.

Section 16. Tax Covenants. (a) *General.* The District shall not take any action, or fail to take any action, if such action or failure to take such action would adversely affect the exclusion from gross income of the interest payable on any Tax-Exempt Series 2025 Bonds under Section 103 of the Code. Without limiting the generality of the foregoing, the District hereby covenants that it will comply with the requirements of the Tax Certificate to be executed by the District on the date of issuance of any Tax-Exempt Series 2025 Bonds. The provisions of this subsection (a) shall survive payment in full or defeasance of the Series 2025 Bonds.

(b) *Yield Restriction.* In the event that at any time the District is of the opinion that for purposes of this Section it is necessary or helpful to restrict or limit the yield on the investment of any monies held by the Treasurer of the County, the county superintendent of which has jurisdiction over the District, on behalf of the District, in accordance with this Resolution or pursuant to law, the District shall so request of the Treasurer of the County, the county superintendent of which has jurisdiction over the District, in writing, and the District shall make its best efforts to ensure that the Treasurer of the County, the county superintendent of which has jurisdiction over the District, shall take such action as may be necessary in accordance with such instructions.

(c) *Reliance on Opinion of Bond Counsel.* Notwithstanding any provision of this Section, if the District shall provide to the Treasurer of the County, the county superintendent of which has jurisdiction over the District, an Opinion of Bond Counsel that any specified action required under this Section is no longer required or that some further or different action is required to maintain the exclusion from federal income tax of interest on any Tax-Exempt Series 2025 Bonds under Section 103 of the Code, the Treasurer of the County, the county superintendent of which has jurisdiction over the District, may conclusively rely on such Opinion of Bond Counsel

in complying with the requirements of this Section and each Tax Certificate, and the covenants hereunder shall be deemed to be modified to that extent.

Section 17. Professional Services. Fieldman, Rolapp & Associates, Inc. shall serve as Municipal Advisor to the District for the Series 2025 Bonds. Orrick, Herrington & Sutcliffe LLP shall serve as bond counsel and disclosure counsel to the District for the Series 2025 Bonds.

Section 18. Delegation of Authority. The Authorized Officers are, and each of them is, hereby authorized and directed, jointly and severally, to execute and deliver, for and on behalf of the District, any and all agreements, documents, certificates and instruments, and to do and cause to be done any and all things, which they may deem necessary or advisable in order to consummate the transactions herein authorized and otherwise to carry out, give effect to and comply with the terms and intent of this Resolution, including, without limitation negotiating the terms of the insurance policy, if any, referred to herein.

Section 19. Approval of Actions. All actions heretofore taken by the officers, employees and agents of the District with respect to the issuance and sale of the Series 2025 Bonds, or in connection with or related to any of the agreements, documents, certificates or instruments referred to herein, are hereby approved, confirmed and ratified.

Section 20. Debt Management Policy; Notice to California Debt and Investment Advisory Commission. With the passage of this Resolution, the Board of Trustees hereby certifies that the Debt Management Policy complies with California Government Code Section 8855(i), and that the Series 2025 Bonds authorized to be issued pursuant to this Resolution are consistent with such policy, and instructs Bond Counsel, on behalf of the District, with respect to each series of Series 2025 Bonds issued pursuant to this Resolution, (a) to cause notices of the proposed sale and final sale of the Series 2025 Bonds to be filed in a timely manner with the California Debt and Investment Advisory Commission pursuant to California Government Code Section 8855, and (b) to check, on behalf of the District, the "Yes" box relating to such certifications in the notice of proposed sale filed pursuant to California Government Code Section 8855.

Section 21. Electronic Signatures; DocuSign. The Board of Trustees hereby approves the execution and delivery of all agreements, documents, certificates and instruments referred to herein with electronic signatures as may be permitted under the California Uniform Electronic Transactions Act and digital signatures as may be permitted under Section 16.5 of the California Government Code using DocuSign

Section 22. Filing with Counties. The Superintendent, or such other officer or employee of the District as the Superintendent may designate, is hereby authorized and directed to report to the Auditor-Controller of each County the final terms of sale of the Series 2025 Bonds, and to file with the Auditor-Controller and with the Treasurer of each County a copy of the executed Certificate of Award and this Resolution, and the schedule of amortization of the principal of and payment of interest on the Series 2025 Bonds, and to file with the Treasurer of the County, the county superintendent of which has jurisdiction over the District, a proposed schedule of draws on the building fund of the District established for the Series 2025 Bonds, and this Resolution shall serve as the notice required to be given by Section 15140(c) of the California Education Code and as the District's request to the Auditor-Controller of each County and the Board of Supervisors of

each County to propose and adopt in each year a tax rate applicable to all taxable property of the District for payment of the Series 2025 Bonds, pursuant to law; and to the other officers of each County to levy and collect said taxes for the payment of the Series 2025 Bonds, to pay in a timely manner to the Paying Agent on behalf of the Owners of the Series 2025 Bonds the principal, interest, and premium, if any, due on the Series 2025 Bonds in each year, and to create in the treasury of the County, the county superintendent of which has jurisdiction over the District, to the credit of the District a building fund and an interest and sinking fund for the Series 2025 Bonds pursuant to Section 15146 of the California Education Code.

Section 23. Contract with Bondholders. The provisions of this Resolution shall be a contract with each and every Owner of Bonds and the duties of the District and of the Board of Trustees and the officers of the District shall be enforceable by any Owner of Bonds by mandamus or other appropriate suit, action or proceeding in any court of competent jurisdiction.

Section 24. Amendments. This Resolution may be modified or amended without the consent of the Owners of the Series 2025 Bonds (a) to add to the covenants and agreements of the District in this Resolution contained other covenants and agreements thereafter to be observed or to surrender any right or power herein reserved to or conferred upon the District, (b) to make such provisions for the purpose of curing any ambiguity, inconsistency or omission, or of curing or correcting any defective provision contained in this Resolution, (c) to permit the qualification of this Resolution under the Trust Indenture Act of 1939, as amended, or any similar federal statute hereafter in effect, and to add such other terms, conditions and provisions as may be permitted by said act or similar federal statute, (d) to cause interest on any Tax-Exempt Series 2025 Bonds to be excludable from gross income for purposes of federal income taxation by the United States of America; and (e) in any other respect whatsoever as the District may deem necessary or desirable, provided that such modification or amendment does not, as set forth in a written certificate of the District, materially adversely affect the interests of the Owners hereunder. For any other purpose, this Resolution may be modified or amended only with the consent of the Owners of a majority of the aggregate principal amount of all Series 2025 Bonds then outstanding; provided that any such modification or amendment to Section 6(f) or Section 23 shall require the consent of the Owners of a majority of the aggregate principal amount of all Bonds then outstanding. No such modification or amendment shall extend the maturity of, reduce the interest rate or redemption premium on or principal amount of any Series 2025 Bond or reduce the percentage of consent required for amendment hereof without the express consent of all the Owners so affected.

Section 25. Effective Date. This Resolution shall take effect from and after its date of adoption.

PASSED AND ADOPTED this day, August 4, 2025.

President of the Board of Trustees of the
Lowell Joint School District

ATTEST:

Clerk of the Board of Trustees of the
Lowell Joint School District

EXHIBIT A

GOOD FAITH ESTIMATES

The good faith estimates set forth herein are provided with respect to the Series 2025 Bonds in compliance with Section 15146(b)(1)(D) of the California Education Code and Section 5852.1 of the California Government Code. Such good faith estimates have been provided to the District by Fieldman, Rolapp & Associates, Inc., as the District's financial advisor under California Education Code Section 15146(b)(1)(C) and the District's municipal advisor under Section 15B of the Securities Exchange Act of 1934 (the "Municipal Advisor").

Principal Amount. The Municipal Advisor has informed the District that, based on the District's financing plan and market conditions prevailing at the time of preparation of such estimate, its good faith estimate of the aggregate principal amount of the Series 2025 Bonds to be sold in a public offering is \$35,000,000 (the "Estimated Principal Amount").

True Interest Cost of the Series 2025 Bonds. The Municipal Advisor has informed the District that, assuming that the Estimated Principal Amount of the Series 2025 Bonds is sold, and based on market conditions prevailing at the time of preparation of such estimate, its good faith estimate of the true interest cost of the Series 2025 Bonds, which means the rate necessary to discount the amounts payable on the respective principal and interest payment dates to the purchase price received for the Series 2025 Bonds, is 5.13%.

Finance Charge of the Series 2025 Bonds. The Municipal Advisor has informed the District that, assuming that the Estimated Principal Amount of the Series 2025 Bonds is sold, and based on market conditions prevailing at the time of preparation of such estimate, its good faith estimate of the finance charge for the Series 2025 Bonds, which means the sum of all fees and charges paid to third parties (or costs associated with the Series 2025 Bonds), is \$630,000, as follows:

a)	Underwriter's Discount	\$420,000
b)	Credit Enhancement	N/A*
c)	Bond Counsel and Disbursements	62,500
d)	Disclosure Counsel and Disbursements	27,500
e)	Municipal Advisor and Disbursements	62,500
f)	Rating Agency	37,500
g)	Other Expenses	20,000

* A municipal bond insurance policy with respect to the Refunding Bonds may be obtained at a bidder's option.

Amount of Proceeds to be Received. The Municipal Advisor has informed the District that, assuming that the Estimated Principal Amount of the Series 2025 Bonds is sold, and based on market conditions prevailing at the time of preparation of such estimate, its good faith estimate of the amount of proceeds expected to be received by the District for sale of the Series 2025 Bonds, less the finance charge of the Series 2025 Bonds, as estimated above, and any reserves or capitalized interest paid or funded with proceeds of the Series 2025 Bonds, is \$34,370,000.

Total Payment Amount. The Municipal Advisor has informed the District that, assuming that the Estimated Principal Amount of the Series 2025 Bonds is sold, and based on market conditions prevailing at the time of preparation of such estimate, its good faith estimate of the total payment amount, which means the sum total of all payments the District will make to pay debt service on the Series 2025 Bonds, plus the estimated finance charge for the Series 2025 Bonds, as described above, not paid with the proceeds of the Series 2025 Bonds, calculated to the final maturity of the Series 2025 Bonds, is \$78,768,449.

The foregoing estimates constitute good faith estimates only and are based on market conditions prevailing at the time of preparation of such estimates. The actual principal amount of the Series 2025 Bonds issued and sold, the true interest cost thereof, the finance charges thereof, the amount of proceeds received therefrom and total payment amount with respect thereto may differ from such good faith estimates for a variety of reasons, including, without limitation, due to (a) the market conditions prevailing on the actual date of the sale of the Series 2025 Bonds being different than the market conditions prevailing at the time of preparation of the estimates contained herein, (b) the actual principal amount of Series 2025 Bonds sold being different from the Estimated Principal Amount, (c) the actual amortization of the Series 2025 Bonds being different than the amortization assumed for purposes of preparing the estimates contained herein, (d) the actual interest rates at which the Series 2025 Bonds are sold being different than those estimated for purposes of preparing the estimates contained herein, (e) other market conditions, or (f) alterations in the District's financing plan, or a combination of such factors. The actual date of sale of the Series 2025 Bonds and the actual principal amount of Series 2025 Bonds sold will be determined by the District based on the need for project funds and other factors. The actual interest rates borne by, and the actual amortization of, the Series 2025 Bonds will depend on market conditions at the time of sale thereof. Market conditions, including, without limitation, interest rates, are affected by economic and other factors beyond the control of the District and the Municipal Advisor. The Board of Trustees has approved the issuance of the Series 2025 Bonds with a maximum true interest cost of 6.50%.

EXHIBIT B

FORM OF SERIES 2025 BOND

Number	UNITED STATES OF AMERICA	Amount
R-__	STATE OF CALIFORNIA	\$_____
	ORANGE AND LOS ANGELES COUNTIES	

**LOWELL JOINT SCHOOL DISTRICT
(ORANGE AND LOS ANGELES COUNTIES, CALIFORNIA)
GENERAL OBLIGATION BONDS, ELECTION OF 2024, SERIES 2025**

<u>Maturity Date</u>	<u>Interest Rate</u>	<u>Dated as of</u>	<u>CUSIP No.</u>
August 1, 20__	_____%	_____, 2025	_____

Registered Owner: CEDE & CO.

Principal Amount: _____ DOLLARS

Lowell Joint School District, Orange and Los Angeles Counties, State of California (the "District"), acknowledges itself obligated to and promises to pay to the Registered Owner identified above or registered assigns, on the Maturity Date set forth above or upon prior redemption hereof, the Principal Amount specified above in lawful money of the United States of America, and to pay interest thereon in like lawful money from the interest payment date next preceding the date of authentication of this Series 2025 Bond (unless this bond is authenticated after the close of business on a Record Date (as defined herein) and on or prior to the succeeding interest payment date, in which event it shall bear interest from such interest payment date, or unless this Series 2025 Bond is authenticated on or before _____ 15, 20__, in which event it shall bear interest from the date hereof) at the Interest Rate per annum stated above, payable commencing on _____ 1, 20__, and thereafter on February 1 and August 1 in each year, until payment of the Principal Amount. This Series 2025 Bond is issued pursuant to a Resolution adopted by the Board of Trustees of the District on August 4, 2025 (the "Resolution"). Capitalized undefined terms used herein have the meanings ascribed thereto in the Resolution.

The principal hereof is payable to the Registered Owner hereof upon the surrender hereof at the principal corporate trust office of U.S. Bank Trust Company, National Association, the paying agent/registrar and transfer agent of the District (the "Paying Agent"). Interest shall be computed on the basis of a 360-day year comprised of twelve 30-day months. The interest hereon is payable to the person whose name appears on the bond registration books of the Paying Agent as the Registered Owner hereof as of the close of business on the 15th day of the month preceding an interest payment date (the "Record Date"), whether or not such day is a business day, such interest to be paid by check or draft mailed to such Registered Owner at the owner's address as it appears on such registration books, or at such other address filed with the Paying Agent for that

purpose. Upon written request, given no later than the Record Date immediately preceding an interest payment date, of the owner of bonds aggregating at least \$1,000,000 in principal amount, interest will be paid by wire transfer in immediately available funds to an account maintained in the United States as specified by the Registered Owner in such request. So long as Cede & Co. or its registered assigns shall be the Registered Owner of this Series 2025 Bond, payment shall be made in immediately available funds as provided in the Resolution hereinafter described.

This Series 2025 Bond is one of a duly authorized issue of bonds of like tenor (except for such variations, if any, as may be required to designate varying series, numbers, denominations, interest rates, interest payment modes, maturities and redemption provisions), in the aggregate principal amount of \$_____, and designated as "Lowell Joint School District (Orange and Los Angeles Counties, California) General Obligation Bonds, Election of 2024, Series 2025" (the "Series 2025 Bonds"). The Series 2025 Bonds were authorized by a vote of at least 55% percent of the voters voting at an election duly and legally called, held and conducted in the District on November 5, 2024. The Series 2025 Bonds are issued and sold by the Board of Trustees of the District pursuant to and in strict conformity with the provisions of the Constitution and laws of the State, and of the Resolution, and subject to the more particular terms specified in the Certificate of Award of the Series 2025 Bonds, executed by the District on_____, 2025 (the "Certificate of Award").

The Series 2025 Bonds are issuable as fully registered bonds without coupons in the denomination of \$5,000 principal amount or any integral multiple thereof, provided that no Series 2025 Bond shall have principal maturing on more than one principal maturity date. Subject to the limitations and conditions and upon payment of the charges, if any, as provided in the Resolution, Series 2025 Bonds may be exchanged for a like aggregate principal amount of Series 2025 Bonds of the same tenor, interest payment mode, and maturity of other authorized denominations.

This Series 2025 Bond is transferable by the Registered Owner hereof, in person or by attorney duly authorized in writing, at the principal corporate trust office of the Paying Agent, but only in the manner, subject to the limitations and upon payment of the charges provided in the Resolution, and upon surrender and cancellation of this Series 2025 Bond. Upon such transfer, a new Series 2025 Bond or Series 2025 Bonds of authorized denomination or denominations of the same tenor, interest payment mode, and same aggregate principal amount will be issued to the transferee in exchange herefor.

The District and the Paying Agent may treat the registered owner hereof as the absolute owner hereof for all purposes, and the District and the Paying Agent shall not be affected by any notice to the contrary.

[The Series 2025 Bonds are subject to optional and mandatory sinking fund redemption on the terms and subject to the conditions specified in the Resolution and the Certificate of Award. If this Series 2025 Bond is called for redemption and payment is duly provided therefor, interest shall cease to accrue hereon from and after the date fixed for redemption.]

The Board of Trustees of the District hereby certifies and declares that the total amount of indebtedness of the District, including the amount of this Series 2025 Bond, is within the limit provided by law; that all acts, conditions and things required by law to be done or performed

precedent to and in the issuance of this Series 2025 Bond have been done and performed in strict conformity with the laws authorizing the issuance of this Series 2025 Bond; and that this Series 2025 Bond is in substantially the form prescribed by order of the Board of Trustees duly made and entered on its minutes. The Series 2025 Bonds represent an obligation payable out of the interest and sinking fund of the District established for the Series 2025 Bonds, and the money for the payment of principal of, premium, if any, and interest hereon, shall be raised by taxation upon the taxable property of the District.

Unless this Series 2025 Bond is presented by an authorized representative of The Depository Trust Company, a New York corporation ("DTC"), to the Paying Agent for registration of transfer, exchange, or payment, and any Series 2025 Bond issued is registered in the name of Cede & Co. or in such other name as is requested by an authorized representative of DTC (and any payment is made to Cede & Co. or to such other entity as is requested by an authorized representative of DTC), ANY TRANSFER, PLEDGE, OR OTHER USE HEREOF FOR VALUE OR OTHERWISE BY OR TO ANY PERSON IS WRONGFUL inasmuch as the Registered Owner hereof, Cede & Co., has an interest herein.

This Series 2025 Bond shall not be entitled to any benefit under the Resolution, or become valid or obligatory for any purpose, until the certificate of authentication and registration hereon endorsed shall have been signed by the Paying Agent.

IN WITNESS WHEREOF, the Board of Trustees of the Lowell Joint School District, Orange and Los Angeles Counties, State of California, has caused this bond to be signed by its President and countersigned by the Clerk of said Board, as of the date set forth above.

President of the Board of Trustees of the
Lowell Joint School District

Countersigned:

Clerk of the Board of Trustees of the
Lowell Joint School District

CERTIFICATE OF AUTHENTICATION AND REGISTRATION

This is one of the Series 2025 Bonds described in the within-mentioned Resolution and authenticated and registered on _____.

**U.S. BANK TRUST COMPANY,
NATIONAL ASSOCIATION, AS
PAYING AGENT**

By: _____
Authorized Officer

ASSIGNMENT

For value received the undersigned do(es) hereby sell, assign and transfer unto _____ the within-mentioned Series 2025 Bond and hereby irrevocably constitute(s) and appoint(s) _____ attorney, to transfer the same on the books of the Paying Agent with full power of substitution in the premises.

I.D. Number

Note: The signature(s) on this Assignment must correspond with the name(s) as written on the face of the within Series 2025 Bond in every particular, without alteration or enlargement or any change whatsoever.

Dated: _____

Signature Guarantee: _____

Note: Signature must be guaranteed by an eligible guarantor institution.

CLERK'S CERTIFICATE

I, Regina L. Woods, Clerk of the Board of Trustees of the Lowell Joint School District, Orange and Los Angeles Counties, California, hereby certify that the foregoing is a full, true and correct copy of a resolution duly adopted at a regular meeting of the Board of Trustees of said District held at the regular meeting place thereof on August 4, 2025, and entered in the minutes thereof, of which meeting all of the members of the Board of Trustees had due notice and at which a quorum thereof was present, and that at said meeting the resolution was adopted by the following vote:

AYES:

NOES:

ABSTAIN:

ABSENT:

An agenda of the meeting was posted at least 72 hours before the meeting at 11019 Valley Home Avenue, Whittier, California, a location freely accessible to members of the public, and on the District's website at <https://www.ljsd.org/Board/Board-Books-Agendas--Minutes/Board-Agendas/2025-2026-Agendas/index.html> and a brief description of the resolution appeared on the agenda.

I further certify that I have carefully compared the same with the original minutes of said meeting on file and of record in the District administrative office; the foregoing resolution is a full, true and correct copy of the original resolution adopted at said meeting and entered in said minutes; and that said resolution has not been amended, modified or rescinded since the date of its adoption, and the same is now in full force and effect.

Dated: _____, 2025

Clerk of the Board of Trustees of the
Lowell Joint School District

OFFICIAL NOTICE OF SALE

\$[PAR]*
LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
General Obligation Bonds, Election of 2024, Series 2025

NOTICE IS HEREBY GIVEN that electronic and sealed bids will be received on behalf of the Board of Trustees of the Lowell Joint School District, Orange and Los Angeles Counties, California (the “District”), for the purchase of \$[PAR]* aggregate principal amount of Lowell Joint School District (Orange and Los Angeles Counties, California) General Obligation Bonds, Election of 2024, Series 2025 (the “Series 2025 Bonds”), on

[____], [SALE DATE], 2025
at [9:30] A.M.

California time, at the offices of the Municipal Advisor to the District with respect to the Series 2025 Bonds, Fieldman, Rolapp & Associates, Inc., 19900 MacArthur Boulevard, Suite 1100, Irvine, CA 92612 (telephone [(949) 660-7314]), Attn: Jason Chung.

The District reserves the right to cancel or reschedule the sale of the Series 2025 Bonds or alter the terms thereof upon notice given through Thomson Municipal News (the “News Service”) on its website at <http://www.tm3.com> at any time prior to the time bids are then-scheduled to be received. If the sale is rescheduled, bids will be received at the place set forth above, at a date and time to be determined, and notice of the new sale date, time and terms, if any, will be given through the News Service as soon as practicable. As an accommodation to bidders, telephone or fax notice of the change and of the new sale date and time will be given to any bidder requesting such notice from the District’s Municipal Advisor, Fieldman, Rolapp & Associates, Inc., 19900 MacArthur Boulevard, Suite 1100, Irvine, CA 92612 (telephone [(949) 660-7314]), Attn: Jason Chung. Failure of any bidder to receive such supplementary notice shall not affect the legality of the sale.

TERMS OF THE SERIES 2025 BONDS

Important Note: This notice will be submitted to PARITY® (“Parity”) for posting at Parity’s website and in the BiDCOMP/ Parity bid delivery system. In the event Parity’s summary of the terms of sale of the Series 2025 Bonds disagrees with this Official Notice of Sale in any particulars, the terms of this Official Notice of Sale shall control (unless notice of an amendment hereto is given as described above).

Issue: The terms of issuance, principal and interest repayment, optional redemption, mandatory redemption, security, tax opinion, and all other information regarding the Series 2025 Bonds and the District are given in the Preliminary Official Statement, dated [____], 2025, relating to the Series 2025 Bonds (the “Preliminary Official Statement”) which each bidder must have obtained and reviewed prior to bidding for the Series 2025 Bonds. This notice governs only the terms of sale, bidding and closing procedures.

* Approximate; subject to adjustment.

Maturities: The Series 2025 Bonds will mature on August 1 in each of the years, and in the approximate amounts, in accordance with the following schedule.

<u>Maturity Date</u> <u>(August 1,)</u>	<u>Principal</u> <u>Amount*</u>	<u>Maturity Date</u> <u>(August 1,)</u>	<u>Principal</u> <u>Amount*</u>
20[]	\$[]	20[]	\$[]
20[]		20[]	
20[]		20[]	
20[]		20[]	
20[]		20[]	
20[]		20[]	
20[]		20[]	
20[]		20[]	
20[]		20[]	
20[]		20[]	

Serial Series 2025 Bonds and/or Term Series 2025 Bonds: The Series 2025 Bonds shall be issued as serial maturities as shown in the table above, unless the bidder requests the creation of one or more term Series 2025 Bonds by combining any two or more consecutive serial maturities of the Series 2025 Bonds. For any term Series 2025 Bond, the amount of principal paid in each year as the mandatory sinking fund payment shall be the amount shown above as maturing in such year. No term Series 2025 Bond shall have a mandatory sinking fund payment prior to August 1, 20[].

Interest Rates: Interest on the Series 2025 Bonds is payable on February 1 and August 1 of each year, commencing February 1, 2026. Interest is calculated on the basis of a 30-day month, 360-day year from the date of the Series 2025 Bonds. Each Series 2025 Bond shall bear interest at the specified rate from its date to its stated maturity date, and all Series 2025 Bonds maturing at any one time shall bear the same rate of interest.

Bidders must specify the rate or rates of interest which the Series 2025 Bonds hereby offered for sale shall bear. Bidders will be permitted to bid a rate or rates of interest according to the following:

- (i) Each interest rate must be greater than zero and no interest rate may exceed 8.00% per annum.
- (ii) No interest rate specified is more than [] percentage points higher than any other interest rate.
- (iii) Each interest rate must be a multiple of 1/8 or 1/20 of 1.00% per annum.

Adjustment of Principal Amounts: The principal amounts of each maturity of Series 2025 Bonds set forth above in the table entitled "Maturities," reflect certain estimates of the District and its Municipal Advisor with respect to the likely interest rates of the winning bid and the premium

* Approximate, subject to adjustment.

contained in the winning bid. Following the determination of the successful bidder, the District, in order to structure for tax rate considerations, reserves the right to increase or decrease the principal amount of each maturity of the Series 2025 Bonds, in \$5,000 increments, and/or eliminate a maturity of the Series 2025 Bonds and decrease the aggregate principal amount of the Series 2025 Bonds to be issued; provided, however, that the total adjustments to the aggregate principal amount of the Series 2025 Bonds shall not exceed \$[_____]. The successful bidder will be notified of the actual principal amounts and maturity schedule relating to the Series 2025 Bonds within 26 hours of the bid opening. The aggregate price bid by the successful bidder will be adjusted by the District proportionate to any increase or decrease in the aggregate principal amount of the Series 2025 Bonds and without consideration for the reoffering price by the successful bidder to the public of any individual maturity of the Series 2025 Bonds. No such adjustments will alter the basis upon which the best bid is determined. THE SUCCESSFUL BIDDER MAY NOT WITHDRAW ITS BID OR CHANGE THE INTEREST RATES BID OR ANY INITIAL REOFFERING PRICES AS A RESULT OF ANY CHANGES MADE TO THE STATED PRINCIPAL AMOUNTS.

TERMS OF SALE

Best Bid: The Series 2025 Bonds will be awarded to the responsible bidder submitting the best responsive bid, considering the interest rate or rates specified and the premium offered (which premium[, net of any insurance premium and any additional fees charged by any rating agency for rating insured Series 2025 Bonds to be paid by the winning bidder], shall be no less than [_____] percent ([_____]%) and no greater than [_____] percent ([_____]%) of the par value of the Series 2025 Bonds), if any. The best bid will be the bid which represents the lowest true interest cost (“TIC”) to the District. The TIC is the discount rate which, when compounded semiannually and used to discount all debt service payments on the Series 2025 Bonds back to the date of such Series 2025 Bonds, results in an amount equal to the price bid for the Series 2025 Bonds. In the event that two or more bidders offer bids for the Series 2025 Bonds at the same lowest TIC, the District will determine by lottery which bidder will be awarded the Series 2025 Bonds. For the purpose of calculating the TIC, the mandatory sinking fund payments, if any (see “TERMS OF THE SERIES 2025 BONDS—Serial Series 2025 Bonds and/or Term Series 2025 Bonds” above), shall be treated as serial maturities in such years. The determination of the bid representing the lowest TIC will be made without regard to any adjustments made or contemplated to be made after the award by the Assistant Superintendent, Business Services of the District (the “Assistant Superintendent”), as described herein under “TERMS OF THE SERIES 2025 BONDS—Adjustment of Principal Amounts,” even if such adjustments have the effect of raising the TIC of the successful bid to a level higher than the bid containing the next lowest TIC prior to adjustment.

Maximum Underwriter’s Discount: The underwriter’s discount for the sale of Series 2025 Bonds shall not exceed [_____] % of the principal amount of such Series 2025 Bonds [(exclusive of any insurance premium and any additional fees charged by any rating agency for rating insured Series 2025 Bonds to be paid by the winning bidder)].

Form of Bid: Each bid must be for not less than all of the Series 2025 Bonds hereby offered for sale. Bids for the Series 2025 Bonds must be for not less than the par value thereof plus such premium (which premium[, net of any insurance premium and any additional fees charged by any rating agency for rating insured Series 2025 Bonds to be paid by the winning bidder], shall be no less than [_____] percent ([_____]%) and no greater than [_____] percent ([_____]%) of the par value of

the Series 2025 Bonds) as is specified in the bid. No bid will be accepted which contemplates the waiver of any interest or other concession by the bidder as a substitute for payment in full of the purchase price. **Each bid must be in accordance with, and shall be deemed to incorporate, all of the terms and conditions set forth in this Official Notice of Sale. Bids may (but, except as provided below, need not) be submitted on the bid form provided.**

Bids for the Series 2025 Bonds may be delivered by hand or by electronic transmission via the BiDCOMP/Parity bid delivery system.

Hand Delivery: Bids delivered by hand must be on the official bid form attached hereto, signed by the bidder, and enclosed in a sealed envelope addressed to the Assistant Superintendent, Business Services, Lowell Joint School District, c/o Fieldman, Rolapp & Associates, Inc., the Municipal Advisor to the District at the address given on Page 1 of this Official Notice of Sale, and clearly marked "Proposal for Lowell Joint School District (Orange and Los Angeles Counties, California) General Obligation Bonds, Election of 2024, Series 2025" (or words of similar import). If the sale of the Series 2025 Bonds is canceled or postponed, all sealed bids shall be returned unopened.

Electronic Transmission: Solely as an accommodation to bidders, the District will accept bids for the Series 2025 Bonds in electronic form exclusively through the BiDCOMP/Parity bid delivery system. Each bidder submitting an electronic bid understands and agrees by doing so that it is solely responsible for all arrangements with Parity, that the District neither endorses nor encourages the use of Parity, and that Parity is not acting as an agent of the District. Instructions and forms for submitting electronic bids must be obtained from Parity. Bidders may contact Parity directly at (212) 404-8102 or at the Parity website: <http://munis.ipreo.com>.

WARNINGS: The District assumes no responsibility for ensuring or verifying bidder compliance with Parity's procedures. The District shall be entitled to assume that any bid received via Parity has been made by a duly authorized agent of the bidder. The District, the Municipal Advisor and Bond Counsel assume no responsibility for any malfunction of the BiDCOMP/Parity bid delivery system, any failure of a bid to be received at the official time, or any error contained in any bid submitted electronically. The official time for receipt of bids will be determined by the District at the place of bid opening, and the District shall not be required to accept the time kept by Parity as the official time. In the event of a malfunction of the Parity system, bidders should submit their bids by hand delivery on the official bid form attached hereto.

THE DISTRICT RETAINS ABSOLUTE DISCRETION TO DETERMINE WHETHER ANY BID, WHETHER DELIVERED BY HAND OR ELECTRONIC TRANSMISSION, IS TIMELY, LEGIBLE AND COMPLETE.

Multiple Bids: In the event multiple bids are received from a single bidder by any means or combination thereof, the District shall accept the bid representing the lowest true interest cost to the District, and each bidder agrees by submitting any bid to be bound by such best bid.

Statement of True Interest Cost (TIC): Each bidder is requested, but not required, to state in its bid the total percentage TIC, which shall be considered as informative only and not binding on either the bidder or the District.

Good Faith Deposit: Upon acceptance of its bid, the winning bidder shall be required to deliver a good faith deposit (the "Good Faith Deposit") in the amount of \$100,000 payable to the order of U.S. Bank Trust Company, National Association, as cost of issuance custodian, or the Treasurer-Tax Collector of the County of Orange (the "County"), as directed by the District, by wire transfer of immediately available funds, to secure the District from any loss resulting from the failure of the winning bidder to comply with the terms of its bid. Wiring instructions shall be provided to the winning bidder upon notification of the award. The Good Faith Deposit must be made by the winning bidder within 24 hours of notification of the award.

No interest will be paid upon the Good Faith Deposit made by the winning bidder. The Good Faith Deposit of the winning bidder will, immediately upon receipt, become the property of the District to be held and invested for the exclusive benefit of the District. The principal amount of such Good Faith Deposit shall be applied to the purchase price of the Series 2025 Bonds at the time of delivery thereof.

If the purchase price is not paid in full upon tender of the Series 2025 Bonds, the winning bidder shall have no right in or to the Series 2025 Bonds or to the recovery of its Good Faith Deposit, or to any allowance or credit by reason of such Good Faith Deposit, unless it shall appear that the Series 2025 Bonds would not be validly issued if delivered to the winning bidder in the form and manner proposed. In the event of nonpayment by the winning bidder, the amount of the Good Faith Deposit shall be retained by the District as and for liquidated damages for such failure by the winning bidder, and such retention shall constitute a full release and discharge of all claims by the District against the winning bidder arising from such failure. The District's actual damages in such event may be greater or may be less than the amount of the Good Faith Deposit, and each bidder waives any right to claim that the District's actual damages are less than such amount.

Bond Insurance at Bidder's Option: Bids will be accepted which are based upon the issuance of a municipal bond insurance policy for some or all of the Series 2025 Bonds, provided that payment of any insurance premium and any additional fees charged by any rating agency for rating insured Series 2025 Bonds shall be the sole responsibility of the bidder. The District has received an "[]" rating from [] on the Series 2025 Bonds and will be responsible for the rating fee incurred only in connection with such rating.

Bids shall not be conditioned upon the issuance of a municipal bond insurance policy. Subject to the limitations described below, the District will cooperate in any effort to qualify the Series 2025 Bonds for such bond insurance. The District makes no representation as to whether the Series 2025 Bonds will qualify for municipal bond insurance, and satisfaction of any conditions to the issuance of a municipal bond insurance policy shall be the sole responsibility of the bidder. In particular, the District will neither amend nor supplement the resolution authorizing the issuance of the Series 2025 Bonds in any way nor will it agree in advance of the sale of the Series 2025 Bonds to enter into any additional agreements with respect to the provision of any such policy. FAILURE OF THE INSURANCE PROVIDER TO ISSUE ITS POLICY SHALL NOT CONSTITUTE CAUSE FOR A FAILURE OR REFUSAL BY THE SUCCESSFUL BIDDER TO ACCEPT DELIVERY OF OR PAY FOR THE SERIES 2025 BONDS. IN THE EVENT OF SUCH FAILURE, THE DISTRICT SHALL AMEND THE OFFICIAL STATEMENT AND THE COST OF PRINTING AND MAILING SUCH SUPPLEMENT SHALL BE BORNE BY THE SUCCESSFUL BIDDER ALONE. The successful bidder must provide the District with the

municipal bond insurance commitment and information with respect to the municipal bond insurance policy and the insurance provider for inclusion in the final Official Statement within two (2) business days following the award of the bid. The District will require a certificate from the insurance provider substantially in the form attached hereto as Exhibit A on or prior to the date of delivery of the Series 2025 Bonds, as well as an opinion of counsel to the insurance provider regarding the enforceability of the municipal bond insurance policy, in form reasonably satisfactory to Bond Counsel and the successful bidder. **The successful bidder must also provide the representation, and supporting calculations, set forth in Section 3 of the Form of Issue Price Certificate, attached as Exhibit [B] hereto.**

Right of Rejection: The District reserves the right to reject any and all bids and to waive any irregularity or informality in any bid.

Prompt Award: The Assistant Superintendent will take action awarding the Series 2025 Bonds or rejecting bids not later than twenty-six (26) hours after the expiration of the time herein prescribed for the receipt of the bids, unless such time of award is waived by the successful bidder. Notice of the award will be given promptly to the successful bidder.

CLOSING PROCEDURES AND DOCUMENTS

Delivery and Payment: Delivery of the Series 2025 Bonds through the facilities of DTC will be made to the successful bidder in New York, New York, as soon as the Series 2025 Bonds can be prepared, which it is estimated will be on or about [CLOSING], 2025. Payment for the Series 2025 Bonds must be made in funds immediately available in Orange County, California, on the date of delivery. Any expense of providing immediately available funds, whether by transfer of Federal Reserve Bank funds or otherwise, shall be borne by the successful bidder. The cost of printing the Series 2025 Bonds will be borne by the District.

Right of Cancellation: The successful bidder shall have the right, at its option, to cancel its obligation to purchase the Series 2025 Bonds if the Series 2025 Bonds are not executed and tendered for delivery within 60 days from the date of sale thereof, and in such event the successful bidder shall be entitled to the return of its good faith deposit.

CUSIP Numbers and Other Fees: It is expected that the Municipal Advisor will apply for CUSIP identification numbers for the Series 2025 Bonds, and furnish such numbers to the successful bidder and Bond Counsel. It is anticipated that such CUSIP numbers will be printed on the Series 2025 Bonds being delivered to DTC, but neither the failure to print such number on any Series 2025 Bond nor any error with respect thereto shall constitute cause for a failure or refusal by the successful bidder to accept delivery of and pay for the Series 2025 Bonds in accordance with the terms and conditions of its bid. All expenses in relation to the printing of CUSIP numbers on the Series 2025 Bonds shall be paid by the District, but the CUSIP Service Bureau charge for the assignment of such numbers shall be paid by the successful bidder. The successful bidder shall also be required to pay all fees required by The Depository Trust Company, New York, New York, the Public Securities Association, the Municipal Securities Rulemaking Board and any other similar entity imposing a fee in connection with the issuance of the Series 2025 Bonds.

California Debt and Investment Advisory Commission Fee: Attention of bidders is directed to California Government Code Section 8856, which provides that the lead underwriter or the purchaser of the Series 2025 Bonds shall be charged any California Debt and Investment Advisory Commission fee payable with respect to the Series 2025 Bonds.

Establishment of Issue Price:

(a) The winning bidder shall assist the District in establishing the issue price of the Series 2025 Bonds and shall execute and deliver to the District at Closing an “issue price” or similar certificate setting forth the reasonably expected initial offering price to the public of the Series 2025 Bonds, together with the supporting pricing wires or equivalent communications, substantially in the form attached hereto as Exhibit [B], with such modifications as may be appropriate or necessary, in the reasonable judgment of the winning bidder, the District and Bond Counsel. All actions to be taken by the District under this Official Notice of Sale to establish the issue price of the Series 2025 Bonds may be taken on behalf of the District by the District’s Municipal Advisor identified herein and any notice or report to be provided to the District may be provided to the District’s Municipal Advisor.

(b) The District intends that the provisions of Treasury Regulation Section 1.148-1(f)(3)(i) (defining “competitive sale” for purposes of establishing the issue price of the Series 2025 Bonds) will apply to the initial sale of the Series 2025 Bonds (the “competitive sale requirements”) because:

- (1) the District shall disseminate this Official Notice of Sale to potential underwriters in a manner that is reasonably designed to reach potential underwriters;
- (2) all bidders shall have an equal opportunity to bid;
- (3) the District may receive bids from at least three underwriters of municipal bonds who have established industry reputations for underwriting new issuances of municipal bonds; and
- (4) the District anticipates awarding the sale of the Series 2025 Bonds to the bidder who submits a firm offer to purchase the Series 2025 Bonds at the highest price (or lowest interest cost), as set forth in this Official Notice of Sale.

Any bid submitted pursuant to this Official Notice of Sale shall be considered a firm offer for the purchase of the Series 2025 Bonds, as specified in the bid.

IN THE EVENT THAT THE COMPETITIVE SALE REQUIREMENTS ARE NOT SATISFIED, THE DISTRICT WILL REJECT ALL BIDS AND CANCEL THE SALE.

BIDDERS SHOULD PREPARE THEIR BIDS ON THE ASSUMPTION THAT THE ISSUE PRICE OF THE SERIES 2025 BONDS WILL BE THE REASONABLY EXPECTED INITIAL OFFERING PRICE TO THE PUBLIC.

Litigation: There is no litigation pending concerning the validity of the Series 2025 Bonds, the corporate existence of the District or the entitlement to their respective offices of the officers of the District who will execute the Series 2025 Bonds and other documents or certificates, or the power of Orange County or Los Angeles County to levy and collect taxes on behalf of the District for payment of, and to pay interest and principal on, the Series 2025 Bonds, and the District will furnish to the successful bidder a no-litigation certificate or certificates certifying the foregoing as of and at the time of the delivery of the Series 2025 Bonds.

Closing Documents and Legal Opinion: Each bid will be understood to be conditioned upon the District furnishing to the winning bidder, without charge, concurrently with payment for and delivery of the Series 2025 Bonds, the following closing documents, each dated the date of such delivery:

(a) The opinion of Orrick, Herrington & Sutcliffe LLP, Bond Counsel to the District, approving the validity of the Series 2025 Bonds and stating that based upon an analysis of existing laws, regulations, rulings and court decisions, and assuming, among other matters, the accuracy of certain representations and compliance with certain covenants, interest on the Series 2025 Bonds is excluded from gross income for federal income tax purposes under Section 103 of the Internal Revenue Code of 1986 (the "Code") and is exempt from State of California personal income taxes, and that interest on the Series 2025 Bonds is not a specific preference item for purposes of the federal individual alternative minimum tax, in substantially the form set forth in Appendix [C] to the Official Statement;

(b) The letters of Orrick, Herrington & Sutcliffe LLP, as Disclosure Counsel to the District, separately addressed to the District and the successful bidder observing that, as of the closing date, no facts came to the attention of the attorneys in such firm rendering legal services in connection with such role which caused such counsel to believe that the Official Statement as of its date and as of the time of closing of the sale of the Series 2025 Bonds to the successful bidder on the closing date (except for any CUSIP numbers, financial, accounting, statistical, economic or demographic data or forecasts, numbers, charts, tables, graphs, estimates, projections, assumptions or expressions of opinion, any management discussions and analysis, any information about relationships among the parties, The Depository Trust Company or its book-entry system, Cede & Co., litigation, ratings, rating agencies, the Municipal Advisor, the successful bidder or underwriting, any municipal bond insurer or any municipal bond insurance policy issued by such insurer for the Series 2025 Bonds, any statements about compliance with prior continuing disclosure undertakings, and Appendices [B], [E], and [F] and any appendix containing any municipal bond insurance policy specimen, included or referred to therein or omitted therefrom, as to which no opinion will be expressed) contained or contains any untrue statement of a material fact or omitted or omits to state any material fact necessary to make the statements made therein, in the light of the circumstances under which they were made, not misleading;

(c) Tax certificate of the District concerning facts, estimates and circumstances in existence on the date of issue and various other matters relating to the exclusion of interest on the Series 2025 Bonds under the Code;

(d) A certificate of the District that as of the date of the Official Statement pertaining to the Series 2025 Bonds and at all times subsequent thereto up to and including the time of

delivery of the Series 2025 Bonds to the successful bidder thereof such Official Statement together with any amendments thereto did not contain any untrue statement of material fact or omit to state a material fact necessary to make the statements therein, in light of the circumstances under which they were made, not misleading;

(e) A receipt of the District or Orange County, on behalf of the District, showing that the purchase price of the Series 2025 Bonds, has been received by the District; and

(f) A Continuing Disclosure Certificate of the District, described under the caption "Continuing Disclosure Certificate" below.

Official Statement: The Preliminary Official Statement is in a form deemed final by the District within the meaning of the SEC Rule 15c2-12 promulgated under the Securities Exchange Act of 1934, as amended (the "Rule") although subject to revision, amendment and completion in conformity with such Rule. The District will make available to the winning bidder no later than seven business days after the day of sale of the Series 2025 Bonds electronic copies of the final Official Statement.

The Preliminary Official Statement is expected to be available on the Internet at <http://www.bondbuyer.com/news/coff/index.html>, <http://bloomberg.net>, <https://www.tm3.com/worksheets/pmBBNoticesofSale.jsf> and at Parity's website on or after [____], 2025. Bidders will be required to confirm their consent to delivery of the Preliminary Official Statement in electronic form and their review of a complete copy of the Preliminary Official Statement, as a condition to the acceptance of their bid by the District. The Internet posting of the Preliminary Official Statement does not constitute an offer to sell or the solicitation of an offer to buy, nor shall there be any sale of, the securities described in the Preliminary Official Statement, in any jurisdiction in which such offer, solicitation or sale would be unlawful prior to registration or qualification under the securities laws of any such jurisdiction. To obtain an electronic copy of the Preliminary Official Statement, please contact the District's Municipal Advisor, as set forth on Page 1 of this Official Notice of Sale.

The District undertakes that for a period of twenty-five (25) days following the end of the "underwriting period" as defined in the Rule it will (i) apprise the winning bidder of all material developments, if any, occurring with respect to the Series 2025 Bonds after delivery of the Series 2025 Bonds and (ii) if requested by the winning bidder, prepare a supplement to the final Official Statement with respect to any such material event. The District will presume that, unless notified in writing by the winning bidder, the end of the underwriting period will occur on the date of the delivery of the Series 2025 Bonds. By making a bid on the Series 2025 Bonds, the winning bidder agrees (i) to disseminate to all members of the underwriting syndicate, if any, the final Official Statement, including any supplements prepared by the District, and to file a copy of the final Official Statement with the Municipal Securities Rulemaking Board through its Electronic Municipal Market Access system (as provided by the Rule) and (ii) to take any and all other actions necessary to comply with the applicable rules of the Securities and Exchange Commission and rules governing the offering, sale and delivery of the Series 2025 Bonds to all purchasers, including the requirement of delivery of the final Official Statement.

Continuing Disclosure Certificate: In order to assist bidders in complying with the Rule, the District will undertake, pursuant to a Continuing Disclosure Certificate, to provide certain annual financial information and notices of the occurrence of certain enumerated events. A description of this undertaking is set forth in the Preliminary Official Statement and will also be set forth in the final Official Statement.

Pursuant to the resolution authorizing the issuance of the Series 2025 Bonds, the Board of Trustees of the District approved the execution and delivery of any and all agreements, documents, certificates and instruments referred to therein with electronic signatures under the California Uniform Electronic Transactions Act and digital signatures under Section 16.5 of the Government Code using DocuSign. The District agrees and acknowledges that its intent (i) that, by signing of this Official Notice of Sale using an electronic signature, it is signing, adopting and accepting this Official Notice of Sale, and (ii) that signing this Official Notice of Sale using an electronic signature is the legal equivalent of having placed the undersigned officer's handwritten signature on this Official Notice of Sale on paper. The District acknowledges that it is being provided with an electronic or paper copy of this Official Notice of Sale in a usable format.

Dated: [____], 2025

Assistant Superintendent, Business Services
of Lowell Joint School District

EXHIBIT A

CERTIFICATE OF BOND INSURER

The undersigned, the duly authorized and acting _____ of _____ (the "Bond Insurer"), hereby certifies on behalf of the Bond Insurer as follows:

1. The statements contained in the Official Statement dated _____, 2025 (the "Official Statement"), relating to the Lowell Joint School District (Orange and Los Angeles Counties, California) General Obligation Bonds, Election of 2024, Series 2025 (the "Series 2025 Bonds") provided by the Bond Insurer for use under the captions _____, and _____, in Appendix __ thereto, and on the cover page thereof, which statements constitute descriptions or summaries of the Bond Insurer or municipal bond insurance policy (the "Policy") of the Bond Insurer covering the Series 2025 Bonds, accurately reflect and fairly present the information set forth therein, and do not contain any untrue statement of a material fact or omit to state a material fact necessary to make the statements therein, in light of the circumstances under which they are made, not misleading; and

2. The form of Policy set forth in Appendix __ of the Official Statement is a true and complete copy of the Policy except for the omission therefrom of particulars relating to the Series 2025 Bonds.

Dated: [CLOSING], 2025

[NAME OF BOND INSURER]

By: _____
Title:

EXHIBIT B

FORM OF ISSUE PRICE CERTIFICATE

The undersigned, on behalf of _____ (the “Underwriter”), hereby certifies as set forth below with respect to the sale of the Lowell Joint School District (Orange and Los Angeles Counties, California) General Obligation Bonds, Election of 2024, Series 2025 (the “Series 2025 Bonds”).

1. Reasonably Expected Initial Offering Price.

(a) As of the Sale Date, the reasonably expected initial offering prices of the Series 2025 Bonds to the Public by the Underwriter are the prices listed in Schedule A (the “Expected Offering Prices”). The Expected Offering Prices are the prices for the Maturity of the Series 2025 Bonds used by the Underwriter in formulating its bid to purchase the Series 2025 Bonds. Attached as Schedule B is a true and correct copy of the bid provided by the Underwriter to purchase the Series 2025 Bonds.

(b) The Underwriter was not given the opportunity to review other bids prior to submitting its bid.

(c) The bid submitted by the Underwriter constituted a firm offer to purchase the Series 2025 Bonds.

2. Defined Terms.

(a) “Maturity” means Series 2025 Bonds with the same credit and payment terms. Series 2025 Bonds with different maturity dates, or Series 2025 Bonds with the same maturity date but different stated interest rates, are treated as separate Maturities.

(b) “Public” means any person (including an individual, trust, estate, partnership, association, company, or corporation) other than an Underwriter or a related party to an Underwriter. The term “related party” for purposes of this certificate generally means any two or more persons who have greater than 50 percent common ownership, directly or indirectly.

(c) “Sale Date” means the first day on which there is a binding contract in writing for the sale of a Maturity of the Series 2025 Bonds. The Sale Date of the Series 2025 Bonds is [SALE DATE], 2025.

(d) “Underwriter” means (i) any person that agrees pursuant to a written contract with the District (or with the lead underwriter to form an underwriting syndicate) to participate in the initial sale of the Series 2025 Bonds to the Public, and (ii) any person that agrees pursuant to a written contract directly or indirectly with a person described in clause (i) of this paragraph to participate in the initial sale of the Series 2025 Bonds to the Public (including a member of a selling group or a party to a retail distribution agreement participating in the initial sale of the Series 2025 Bonds to the Public).

3. [If at the successful bidder's option, a bid is based upon the issuance of a municipal bond insurance policy, the following representations and supporting calculations are to be included:] **[Based on the attached calculations, we have calculated that the present value of the interest to be saved on the Series 2025 Bonds as a result of the municipal bond insurance policy (the "Insurance") exceeds the present value of the fees for such Insurance. The Insurance was a material factor in selling the Series 2025 Bonds at the lowest possible yield (given other characteristics of the Series 2025 Bonds). In our judgement, the premium paid for the Insurance does not exceed a reasonable arm's length charge for transfer of the credit risk represented by the Insurance and does not include any payment for any direct or indirect services other than the transfer of credit risk.]**

The representations set forth in this certificate are limited to factual matters only. Nothing in this certificate represents the Underwriter's interpretation of any laws, including specifically Sections 103 and 148 of the Internal Revenue Code of 1986, as amended, and the Treasury Regulations thereunder. The undersigned understands that the foregoing information will be relied upon by the District with respect to certain of the representations set forth in the Tax Certificate and with respect to compliance with the federal income tax rules affecting the Series 2025 Bonds, and by Orrick, Herrington & Sutcliffe LLP, as Bond Counsel, in connection with rendering its opinion that the interest on the Series 2025 Bonds is excluded from gross income for federal income tax purposes, the preparation of the Internal Revenue Service Form 8038-G, and other federal income tax advice that it may give to the District from time to time relating to the Series 2025 Bonds.

The Underwriter agrees that this Certificate may be executed by electronic means, and further agrees and acknowledges that it is the Underwriter's intent (i) that, by the Underwriter signing this Certificate using an electronic signature, it is signing, adopting and accepting this Certificate, and (ii) that signing this Certificate using an electronic signature is the legal equivalent of having placed the undersigned officer's handwritten signature on this Certificate on paper. The Underwriter acknowledges that it is being provided with an electronic or paper copy of this Certificate in a usable format.

Dated: [CLOSING], 2025

[UNDERWRITER]

By: _____
Authorized Representative

OFFICIAL BID FORM

BIDDING FIRM'S NAME:

Authorized Signatory:

[SALE DATE], 2025

(signature)

Assistant Superintendent, Business Services
Lowell Joint School District
11019 Valley Home Ave
Whittier, CA 90603

Re: **\$[PAR]***
LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
General Obligation Bonds, Election of 2024, Series 2025

By the authorized signature above, we hereby submit this bid (consisting of the Premium (which premium, net of any insurance premium and any additional fees charged by any rating agency for rating insured Series 2025 Bonds to be paid by the winning bidder, shall be no less than [] percent ([]%) and no greater than [] percent ([]%) of the par value of the Series 2025 Bonds), Purchase Price, and Interest Rates entered below) for the above-described Series 2025 Bonds in accordance with the Official Notice of Sale relating thereto dated [], 2025, which Notice together with all representations and agreements on Page 2 hereof are hereby made part of this bid:

Par Value: \$[PAR]* + Premium: \$ _____ ** = Purchase Price: \$ _____

Maturity (August 1,)	Principal Amount*	Check if Term Bonds ***	Interest Rate	Maturity (August 1,)	Principal Amount*	Check if Term Bonds ***	Interest Rate
20[]				20[]			
20[]				20[]			
20[]				20[]			
20[]				20[]			
20[]				20[]			
20[]				20[]			
20[]				20[]			
20[]				20[]			
20[]				20[]			
20[]				20[]			
20[]				20[]			
20[]				20[]			

* Preliminary; subject to adjustment pursuant to Official Notice of Sale.

** No less than [] percent ([]%) and no greater than [] percent ([]%) of the par value of the Series 2025 Bonds, net of any insurance premium and any additional fees charged by any rating agency for rating insured Series 2025 Bonds to be paid by the winning bidder.

*** **Please!** Clearly indicate each Term Series 2025 Bond so that Serial Maturities of the same coupon rate are distinguished from Serial Maturities comprising a single Term Series 2025 Bond. E.g., circle maturity, or indicate beginning and end of each Term Series 2025 Bond. No term bond shall have a mandatory sinking fund payment prior to August 1, 20[].

Interest Rate Restrictions: No interest rate specified is more than [] percentage points higher than any other interest rate. Each interest rate bid is a multiple of 1/8 or 1/20 of 1.00% per annum. Each interest rate must be greater than zero and no interest rate may exceed 8.00% per annum.

By execution on the first page of this bid by an authorized officer, we hereby agree and represent as follows:

(1) We agree that, if awarded the Series 2025 Bonds, we will wire to the order of U.S. Bank Trust Company, National Association, as cost of issuance custodian, or the Treasurer-Tax Collector of the County of Orange, as directed by the District, the Good Faith Deposit in the amount of \$100,000 in immediately available funds, upon notice of the award and receipt of wire instructions. We understand that no interest will be paid on such deposit.

(2) We have received and reviewed the Preliminary Official Statement with respect to the Series 2025 Bonds (the "Preliminary Official Statement") and as a condition to bidding on the Series 2025 Bonds, have determined that we can comply with the requirements of Rule 15c2-12 of the Securities and Exchange Commission under the Securities Exchange Act of 1934, as amended.

(3) As of the date of award and as of the date of delivery of the Series 2025 Bonds, all members of our syndicate either participate in DTC or clear through or maintain a custodial relationship with an entity that participates in said depository.

(4) Our computation of the True Interest Cost (TIC) to the District under the foregoing proposal, made as provided in the Official Notice of Sale, is _____%. Our computation of the gross interest cost to the District (net of any premium bid) under the foregoing proposal is \$ _____. These estimates are for informational purposes only and not binding on the District or on the undersigned.

(5) We represent that we have an established industry reputation for underwriting new issuances of municipal bonds.

(6) We represent that we have full and complete authority to submit this bid on behalf of our bidding syndicate and that the undersigned will serve as the lead manager for the group if the Series 2025 Bonds are awarded pursuant to this bid. I certify (or declare) under penalty of perjury under the laws of the State of California that this proposal is genuine, and not a sham or collusion, nor made in the interest of or on behalf of any person not herein named, and that the bidder has not directly or indirectly induced or solicited any other bidder to put in a sham bid or any other person, firm or corporation to refrain from bidding, and that the bidder has not in any manner sought by collusion to secure for himself an advantage over any other bidder.

We hereby request that _____ (not to exceed ____) printed copies of the Official Statement with respect to the Series 2025 Bonds be furnished to us in accordance with the terms of the Official Notice of Sale.

Very truly yours,

Company

By: [executed on first page of bid form]
Authorized Representative

Title

Phone: _____

Fax: _____

Following is a list of the members of our account on whose behalf this bid is made.

Bidder's representative to be contacted
regarding closing procedures:

Name: _____

Phone: _____

Fax: _____

Receipt of Return of Bidder's unaccepted
Good Faith Check Hereby Acknowledged:

By: _____
Authorized Representative

NOTICE OF INTENTION TO SELL

\$[PAR]*

**LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
General Obligation Bonds, Election of 2024, Series 2025**

NOTICE IS HEREBY GIVEN that the above Bonds will be offered for public sale by the Board of Trustees of the Lowell Joint School District, Orange and Los Angeles Counties, California (the "District"), on [____], [SALE DATE], 2025, at [9:30] a.m., California time (or on such other date and times as may be determined by the District as provided in the paragraph below), at the offices of the Municipal Advisor to the District, Fieldman, Rolapp & Associates, Inc., 19900 MacArthur Boulevard, Suite 1100, Irvine, CA 92612, subject to all of the terms and conditions of the Official Notice of Sale describing the Bonds, copies of which (along with a Preliminary Official Statement relating to the Bonds) will be furnished upon request to the Municipal Advisor to the District, Fieldman, Rolapp & Associates, Inc., 19900 MacArthur Boulevard, Suite 1100, Irvine, CA 92612 (telephone [(949) 660-7314]), or can be obtained at no cost in an electronic version from Thomson Municipal News (the "News Service") on its website at <http://www.tm3.com>.

The District reserves the right to postpone or cancel the sale of the Bonds or change the terms thereof upon notice given through the News Service. In the event that no bid is awarded for the Bonds, the District will reschedule the sale of the Bonds to another date or time by providing notification through the News Service.

The District reserves the right to modify or amend the Official Notice of Sale in any respect, as more fully described in the Official Notice of Sale, provided, that any such modification or amendment will be communicated to potential bidders through the PARITY® System ("Parity"), not later than 5:00 p.m., California time, on the business day preceding the date for receiving bids for the Bonds. Failure of any potential bidder to receive notice of any modification or amendment will not affect the sufficiency of any such notice or the legality of the sale.

Dated: [____], 2025

Clerk of the Board of Trustees of the
Lowell Joint School District

**Preliminary; subject to change.*

CONTINUING DISCLOSURE CERTIFICATE

THIS CONTINUING DISCLOSURE CERTIFICATE (this “Disclosure Certificate”) is executed and delivered by the Lowell Joint School District (the “District”) in connection with the issuance of \$[PAR] aggregate principal amount of Lowell Joint School District (Orange and Los Angeles Counties, California) General Obligation Bonds, Election of 2024, Series 2025 (the “Series 2025 Bonds”). The Series 2025 Bonds are being issued pursuant to a resolution adopted by the Board of Trustees of the District on August 4, 2025 (the “Resolution”). The District covenants and agrees as follows:

Section 1. Purpose of the Disclosure Certificate. This Disclosure Certificate is being executed and delivered by the District for the benefit of the Holders and Beneficial Owners of the Series 2025 Bonds and in order to assist the Participating Underwriter in complying with Securities and Exchange Commission Rule 15c2-12(b)(5).

Section 2. Definitions. In addition to the definitions set forth in the Resolution, which apply to any capitalized term used in this Disclosure Certificate unless otherwise defined in this Section, the following capitalized terms shall have the following meanings:

“Annual Report” shall mean any Annual Report provided by the District pursuant to, and as described in, Sections 3 and 4 hereof.

“Beneficial Owner” shall mean any person which has or shares the power, directly or indirectly, to make investment decisions concerning ownership of any Series 2025 Bonds (including persons holding Series 2025 Bonds through nominees, depositories or other intermediaries).

“Dissemination Agent” shall mean Fieldman, Rolapp & Associates, Inc., doing business as Applied Best Practices, or any successor Dissemination Agent designated in writing by the District and which has filed with the District a written acceptance of such designation.

“Financial Obligation” shall mean, for the purposes of the Listed Events set out in Section 5(a)(x) and 5(b)(viii), a (i) debt obligation; (ii) derivative instrument entered into in connection with, or pledged as security or a source of payment for, an existing or planned debt obligation; or (iii) guarantee of (i) or (ii). The term “Financial Obligation” shall not include municipal securities (as defined in the Securities Exchange Act of 1934, as amended) as to which a final official statement (as defined in the Rule) has been provided to the MSRB consistent with the Rule.

“Holder” shall mean the person in whose name any Series 2025 Bond shall be registered.

“Listed Events” shall mean any of the events listed in Section 5(a) or (b) hereof.

“MSRB” shall mean the Municipal Securities Rulemaking Board or any other entity designated or authorized by the Securities and Exchange Commission to receive reports pursuant to the Rule. Until otherwise designated by the MSRB or the Securities and Exchange Commission, filings with the MSRB are to be made through the Electronic Municipal Market Access (EMMA) website of the MSRB, currently located at <http://emma.msrb.org>.

“Official Statement” shall mean the Official Statement, dated [SALE DATE], 2025 (including all exhibits or appendices thereto), relating to the offer and sale of Series 2025 Bonds.

“Participating Underwriter” shall mean the original underwriter(s) of the Series 2025 Bonds required to comply with the Rule in connection with offering of the Series 2025 Bonds.

“Rule” shall mean Rule 15c2-12(b)(5) adopted by the Securities and Exchange Commission under the Securities Exchange Act of 1934, as the same may be amended from time to time.

Section 3. Provision of Annual Reports. (a) The District shall, or shall cause the Dissemination Agent to, not later than nine months after the end of the District’s fiscal year (which due date shall be April 1 of each year, so long as the District’s fiscal year ends on June 30), commencing with the report for the 2024-25 Fiscal Year (which is due not later than April 1, 2026), provide to the MSRB an Annual Report which is consistent with the requirements of Section 4 hereof. The Annual Report must be submitted in electronic format, accompanied by such identifying information as is prescribed by the MSRB, and may cross-reference other information as provided in Section 4 hereof; provided, however, that the audited financial statements of the District may be submitted separately from the balance of the Annual Report and later than the date required above for the filing of the Annual Report if they are not available by that date. If the District’s fiscal year changes, it shall give notice of such change in a filing with the MSRB. The Annual Report shall be submitted on a standard form in use by industry participants or other appropriate form and shall identify the Series 2025 Bonds by name and CUSIP number.

(b) Not later than 15 business days prior to the date specified in subsection (a), the District shall provide the Annual Report to the Dissemination Agent (if other than the District). If the District is unable to provide to the MSRB an Annual Report by the date required in subsection (a), the District shall, in a timely manner, send or cause to be sent to the MSRB a notice in substantially the form attached as Exhibit A.

(c) The Dissemination Agent shall:

(i) (if the Dissemination Agent is other than the District), provide any Annual Report received by it to the MSRB as provided herein; and

(ii) (if the Dissemination Agent is other than the District), file a report with the District certifying that the Annual Report has been provided to the MSRB pursuant to this Disclosure Certificate, stating the date it was provided to the MSRB.

Section 4. Content of Annual Reports. The District’s Annual Report shall contain or include by reference the following:

(a) Audited financial statements of the District for the preceding fiscal year, prepared in accordance with the laws of the State of California and including all statements and information prescribed for inclusion therein by the Controller of the State of California. If the District’s audited financial statements are not available by the time the Annual Report is required to be provided to the MSRB pursuant to Section 3(a) hereof, the Annual Report shall contain unaudited financial

statements in a format similar to the financial statements contained in the final Official Statement, and the audited financial statements shall be provided to the MSRB in the same manner as the Annual Report when they become available.

(b) To the extent not included in the audited financial statements of the District, the Annual Report shall also include the following:

(i) The adopted budget of the District for the then current fiscal year.

(ii) The District's outstanding debt.

(iii) The total assessed valuation of taxable properties within the District for the then-current fiscal year as shown on the most recent equalized assessment role, if and to the extent provided to the District by the counties in which the District is located (the "Counties" or, individually, a "County").

(iv) The twenty taxpayers with the greatest combined ownership of taxable property in the District for the then-current fiscal year, as measured by secured assessed valuation, the amount of their respective assessed value, and their percentage of total secured assessed value, if and to the extent provided to the District by the Counties.

(v) The secured tax levies, collections and delinquencies for properties within the territory of the District for the most recently completed fiscal year, if and to the extent provided to the District by the Counties.

Any or all of the items listed above may be set forth in one or a set of documents or may be included by specific reference to other documents, including official statements of debt issues of the District or related public entities, which have been made available to the public on the MSRB's website. The District shall clearly identify each such other document so included by reference.

Section 5. Reporting of Significant Events. (a) The District shall give, or cause to be given, notice of the occurrence of any of the following events with respect to the Series 2025 Bonds in a timely manner not later than ten business days after the occurrence of the event:

(i) principal and interest payment delinquencies;

(ii) unscheduled draws on debt service reserves reflecting financial difficulties;

(iii) unscheduled draws on credit enhancements reflecting financial difficulties;

(iv) substitution of credit or liquidity providers or their failure to perform;

(v) adverse tax opinions or issuance by the Internal Revenue Service of proposed or final determination of taxability or of a Notice of Proposed Issue (IRS Form 5701 TEB);

(vi) tender offers;

(vii) defeasances;

(viii) rating changes;

(ix) bankruptcy, insolvency, receivership or similar event of the District;

or

(x) default, event of acceleration, termination event, modification of terms, or other similar events under the terms of a Financial Obligation of the District, any of which reflect financial difficulties.

For the purposes of the event identified in subparagraph (ix), the event is considered to occur when any of the following occur: the appointment of a receiver, fiscal agent or similar officer for the District in a proceeding under the U.S. Bankruptcy Code or in any other proceeding under state or federal law in which a court or governmental authority has assumed jurisdiction over substantially all of the assets or business of the District, or if such jurisdiction has been assumed by leaving the existing governmental body and officials or officers in possession but subject to the supervision and orders of a court or governmental authority, or the entry of an order confirming a plan of reorganization, arrangement or liquidation by a court or governmental authority having supervision or jurisdiction over substantially all of the assets or business of the District.

(b) The District shall give, or cause to be given, notice of the occurrence of any of the following events with respect to the Series 2025 Bonds, if material, in a timely manner not later than ten business days after the occurrence of the event:

(i) unless described in paragraph 5(a)(v), other material notices or determinations by the Internal Revenue Service with respect to the tax status of the Series 2025 Bonds or other material events affecting the tax status of the Series 2025 Bonds;

(ii) modifications to rights of Series 2025 Bond Holders;

(iii) Series 2025 Bond calls;

(iv) release, substitution, or sale of property securing repayment of the Series 2025 Bonds;

(v) non-payment related defaults;

(vi) the consummation of a merger, consolidation, or acquisition involving the District or the sale of all or substantially all of the assets of the District, other than in the ordinary course of business, the entry into a definitive

agreement to undertake such an action or the termination of a definitive agreement relating to any such actions, other than pursuant to its terms;

(vii) appointment of a successor or additional paying agent or the change of name of a paying agent; or

(viii) incurrence of a Financial Obligation of the District, or agreement to covenants, events of default, remedies, priority rights, or other similar terms of a Financial Obligation of the District, any of which affect Series 2025 Bond Holders.

(c) The District shall give, or cause to be given, in a timely manner, notice of a failure to provide the annual financial information on or before the date specified in Section 3 hereof, as provided in Section 3(b) hereof.

(d) Upon the occurrence of a Listed Event described in Section 5(a), or upon the occurrence of a Listed Event described in Section 5(b) which the District determines would be material under applicable federal securities laws, the District shall within ten business days of occurrence file a notice of such occurrence with the MSRB. Notwithstanding the foregoing, notice of the Listed Event described in subsection (b)(iii) need not be given under this subsection any earlier than the notice (if any) of the underlying event is given to Holders of affected Series 2025 Bonds pursuant to the Resolution.

(e) The District intends to comply with the Listed Events described in subsection (a)(x) and subsection (b)(viii), and the definition of “Financial Obligation” in Section 2, with reference to the Rule, any other applicable federal securities laws and the guidance provided by the Securities and Exchange Commission in Release No. 34-83885, dated August 20, 2018 (the “2018 Release”), and any further amendments or written guidance provided by the Securities and Exchange Commission or its staff with respect to the amendments to the Rule effected by the 2018 Release.

Section 6. Format for Filings with MSRB. Any report or filing with the MSRB pursuant to this Disclosure Certificate must be submitted in electronic format, accompanied by such identifying information as is prescribed by the MSRB.

Section 7. Termination of Reporting Obligation. The District’s obligations under this Disclosure Certificate shall terminate upon the legal defeasance, prior redemption or payment in full of all of the Series 2025 Bonds. If such termination occurs prior to the final maturity of the Series 2025 Bonds, the District shall give notice of such termination in a filing with the MSRB.

Section 8. Dissemination Agent. The District may, from time to time, appoint or engage a Dissemination Agent to assist it in carrying out its obligations under this Disclosure Certificate, and may discharge any such Dissemination Agent, with or without appointing a successor Dissemination Agent. The Dissemination Agent shall not be responsible in any manner for the content of any notice or report prepared by the District pursuant to this Disclosure Certificate. The initial Dissemination Agent shall be Fieldman, Rolapp & Associates, Inc., doing business as Applied Best Practices.

Section 9. Amendment; Waiver. Notwithstanding any other provision of this Disclosure Certificate, the District may amend this Disclosure Certificate, and any provision of this Disclosure Certificate may be waived, provided that the following conditions are satisfied:

(a) if the amendment or waiver relates to the provisions of Section 3(a) hereof, Section 4 hereof, or Section 5(a) or (b) hereof, it may only be made in connection with a change in circumstances that arises from a change in legal requirements, change in law, or change in the identity, nature or status of the District with respect to the Series 2025 Bonds, or the type of business conducted;

(b) the undertaking, as amended or taking into account such waiver, would, in the opinion of nationally recognized bond counsel, have complied with the requirements of the Rule at the time of the original issuance of the Series 2025 Bonds, after taking into account any amendments or interpretations of the Rule, as well as any change in circumstances; and

(c) the proposed amendment or waiver either (i) is approved by the Holders in the same manner as provided in the Resolution for amendments to the Resolution with the consent of Holders, or (ii) does not, in the opinion of nationally recognized bond counsel, materially impair the interests of the Holders or Beneficial Owners of the Series 2025 Bonds.

In the event of any amendment or waiver of a provision of this Disclosure Certificate, the District shall describe such amendment or waiver in the next Annual Report, and shall include, as applicable, a narrative explanation of the reason for the amendment or waiver and its impact on the type (or in the case of a change of accounting principles, on the presentation) of financial information or operating data being presented by the District. In addition, if the amendment relates to the accounting principles to be followed in preparing financial statements, (i) notice of such change shall be given in a filing with the MSRB, and (ii) the Annual Report for the year in which the change is made should present a comparison (in narrative form and also, if feasible, in quantitative form) between the financial statements as prepared on the basis of the new accounting principles and those prepared on the basis of the former accounting principles.

Section 10. Additional Information. Nothing in this Disclosure Certificate shall be deemed to prevent the District from disseminating any other information, using the means of dissemination set forth in this Disclosure Certificate or any other means of communication, or including any other information in any Annual Report or notice required to be filed pursuant to this Disclosure Certificate, in addition to that which is required by this Disclosure Certificate. If the District chooses to include any information in any Annual Report or notice in addition to that which is specifically required by this Disclosure Certificate, the District shall have no obligation under this Disclosure Certificate to update such information or include it in any future Annual Report or notice of occurrence of a Listed Event or any other event required to be reported.

Section 11. Default. In the event of a failure of the District to comply with any provision of this Disclosure Certificate, any Holder or Beneficial Owner of the Series 2025 Bonds may take such actions as may be necessary and appropriate, including seeking mandate or specific performance by court order, to cause the District to comply with its obligations under this

Disclosure Certificate; provided, that any such action may be instituted only in Superior Court of the State of California in and for the County of Orange or in U.S. District Court in or nearest to the County of Orange. A default under this Disclosure Certificate shall not be deemed an event of default under the Resolution, and the sole remedy under this Disclosure Certificate in the event of any failure of the District to comply with this Disclosure Certificate shall be an action to compel performance.

Section 12. Duties, Immunities and Liabilities of Dissemination Agent. The Dissemination Agent shall have only such duties as are specifically set forth in this Disclosure Certificate, and (if the Dissemination Agent is other than the District), the District agrees to indemnify and save the Dissemination Agent, its officers, directors, employees and agents, harmless against any loss, expense and liabilities which it may incur arising out of or in the exercise or performance of its powers and duties hereunder, including the costs and expenses (including attorneys fees) of defending against any claim of liability, but excluding liabilities due to the Dissemination Agent's negligence or willful misconduct. The obligations of the District under this Section shall survive resignation or removal of the Dissemination Agent and payment of the Series 2025 Bonds.

Section 13. Beneficiaries. This Disclosure Certificate shall inure solely to the benefit of the District, the Dissemination Agent, the Participating Underwriter and Holders and Beneficial Owners from time to time of the Series 2025 Bonds, and shall create no rights in any other person or entity.

Section 14. Electronic Signature. Each of the parties hereto agrees that the transaction consisting of this Disclosure Certificate may be conducted by electronic means. Each party agrees and acknowledges that it is such party's intent that, by signing of this Disclosure Certificate using an electronic signature, it is signing, adopting and accepting this Disclosure Certificate, and that signing this Disclosure Certificate using an electronic signature is the legal equivalent of having placed the undersigned officer's handwritten signature on this Disclosure Certificate on paper. Each party acknowledges that it is being provided with an electronic or paper copy of this Disclosure Certificate in a usable format.

Dated: [CLOSING], 2025

LOWELL JOINT SCHOOL DISTRICT

By: _____

ACCEPTED AND AGREED TO:

**FIELDMAN, ROLAPP & ASSOCIATES,
INC., doing business as Applied Best
Practices, LLC, as Dissemination Agent**

By: _____

Authorized Signatory

EXHIBIT A

**NOTICE TO THE MUNICIPAL SECURITIES RULEMAKING BOARD
OF FAILURE TO FILE ANNUAL REPORT**

Name of Issuer: **LOWELL JOINT SCHOOL DISTRICT**

Name of Issue: Lowell Joint School District (Orange and Los Angeles Counties,
California)
General Obligation Bonds, Election of 2024, Series 2025

Date of Issuance: [CLOSING], 2025

NOTICE IS HEREBY GIVEN that the District has not provided an Annual Report with respect to the above-named Series 2025 Bonds as required by Section 4 of the Continuing Disclosure Certificate of the District, dated [CLOSING], 2025. [The District anticipates that the Annual Report will be filed by _____.]

Dated: _____

LOWELL JOINT SCHOOL DISTRICT

LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
General Obligation Bonds, Election of 2024, Series 2025

CERTIFICATE OF AWARD

The undersigned, [____], [____], of the Lowell Joint School District (the "District"), pursuant to powers delegated to me by a resolution adopted by the Board of Trustees of the District on August 4, 2025 (the "Resolution"), duly authorizing the issuance and sale of Lowell Joint School District (Orange and Los Angeles Counties, California) General Obligation Bonds, Election of 2024, Series 2025 (the "Bonds"), hereby certifies with respect to the award of said Bonds as follows:

ACCEPTANCE OF BID

1. On [SALE DATE], 2025, at [9:30] a.m., the proposals for purchase of the Bonds, summarized in Schedule A attached hereto, were received and opened in accordance with the Official Notice of Sale for the purchase of the Bonds, dated [____], 2025 (the "Official Notice of Sale"). [The time of sale was changed to ____ a.m. in accordance with the Resolution and the Official Notice of Sale, and notice thereof was given prior to the originally scheduled time of sale through _____.]

2. The proposal submitted by [PURCHASER] (the "Purchaser") is in compliance with all of the terms and conditions set forth in the Official Notice of Sale.

3. The bid of the Purchaser is the best responsive bid as determined by the method of calculation for such best responsive bid, set forth in the Official Notice of Sale, as follows:

Purchase Price:
([without/including] premium) \$[____][*]

Total Debt Service:
(dated date to maturity) \$[____]

True Interest Cost: [____]%

4. The Bonds are hereby awarded to the Purchaser based on the true interest cost shown above.

5. All proposals set forth in Schedule A other than said accepted bid of the Purchaser are hereby rejected.

[6. As provided in the Official Notice of Sale, the Purchaser is required to pay any insurance premium and any additional fees charged by any rating agency for rating insured Bonds

* [Excludes amounts required for the insurance premium and rating agency fees charged for rating insured Bonds the Purchaser is obligated to pay under the terms of the Official Notice of Sale.]

from the Purchaser's gross compensation at the time of delivery of the Bonds. As provided in the Official Notice of Sale, such amount has not been added to the Purchase Price for the Bonds.]

TERMS OF THE BONDS

1. The Bonds shall be dated [CLOSING], 2025.
2. The maturity dates, principal amounts, and interest rates of each maturity of the Bonds[, as adjusted pursuant to the Official Notice of Sale,] shall be as set forth in the summary of the bid of the Purchaser attached hereto as Schedule B.
3. The aggregate principal amount of the Bonds is hereby determined to be \$[_____] [, adjusted pursuant to the Official Notice of Sale].
4. The [adjusted] purchase price of the Bonds, including accrued interest, is \$[_____] [, and the adjusted true interest cost is _____%].
5. Interest on the Bonds shall be payable on February 1 and August 1 of each year, commencing February 1, 2026.
6. [At the Purchaser's option, the Bonds shall be insured by a municipal bond insurance policy to be provided by _____. As provided in the Official Notice of Sale, payment of the applicable insurance premium and any additional fees charged by any rating agency for rating the insured Bonds shall be the sole responsibility of the Purchaser.]
7. [(a)] The Bonds shall be subject to optional redemption as follows:

[INSERT OPTIONAL REDEMPTION LANGUAGE]
- [(b)] The Bonds shall be subject to mandatory sinking fund redemption prior to their stated maturity date, without a redemption premium, in part by lot, from mandatory sinking fund payments in the amounts and years shown in Schedule B hereto.]

ELECTRONIC SIGNATURES

Pursuant to the Resolution, the Board of Trustees of the District approved the execution and delivery of any and all agreements, documents, certificates and instruments referred to therein with electronic signatures as may be permitted under the California Uniform Electronic Transactions Act and digital signatures as may be permitted under Section 16.5 of the California Government Code using DocuSign. The District agrees and acknowledges that it is its intent, that if the District signs this Certificate of Award (this "Certificate") using an electronic signature, it is signing, adopting and accepting this Certificate and that signing this Certificate using an electronic signature is the legal equivalent of having placed the undersigned officer's handwritten signature on this Certificate on paper. The District acknowledges that it is being provided with an electronic or paper copy of this Certificate in a usable format.

This award of the Bonds is hereby made at the date and time below.

Date | Time: _____

LOWELL JOINT SCHOOL DISTRICT

By: _____

SCHEDULE A
(To Certificate of Award)

LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
General Obligation Bonds, Election of 2024, Series 2025

LIST OF BIDS

	<u>Bidder Name</u>	<u>True Interest Cost</u>
1.	[PURCHASER]	%
2.		
3.		
4.		
5.		

SCHEDULE B

(To Certificate of Award)

**\$[PAR]
LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
General Obligation Bonds, Election of 2024, Series 2025**

**MATURITY SCHEDULE
(Summary of Accepted Bid)**

\$[] Serial Bonds

<u>Maturity Date (August 1,)</u>	<u>Principal Amount</u>	<u>Rate</u>	<u>Yield</u>

\$[] []% Term Bond Maturing August 1, 20[] – Yield []%

<u>Redemption Date (August 1,)</u>	<u>Principal Amount</u>
	\$

†

†Maturity

\$[] []% Term Bond Maturing August 1, 20[] – Yield []%

<u>Redemption Date (August 1,)</u>	<u>Principal Amount</u>
	\$

†

†Maturity

^(C) Call to yield at par on August 1, 20[].

NEW ISSUE —BOOK-ENTRY ONLY

Rating: Moody's: "[____]"
(See "MISCELLANEOUS — Rating" herein.)

[In the opinion of Orrick, Herrington & Sutcliffe LLP, Bond Counsel to the District, based upon an analysis of existing laws, regulations, rulings and court decisions, and assuming, among other matters, the accuracy of certain representations and compliance with certain covenants, interest on the Series 2025 Bonds is excluded from gross income for federal income tax purposes under Section 103 of the Internal Revenue Code of 1986 and is exempt from State of California personal income taxes. In the further opinion of Bond Counsel, interest on the Series 2025 Bonds is not a specific preference item for purposes of the federal individual alternative minimum tax. Bond Counsel observes that interest on the Series 2025 Bonds included in adjusted financial statement income of certain corporations is not excluded from the federal corporate alternative minimum tax. Bond Counsel expresses no opinion regarding any other tax consequences related to the ownership or disposition of, or the amount, accrual or receipt of interest on, the Series 2025 Bonds. See "TAX MATTERS" herein.]

\$35,000,000*

LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
General Obligation Bonds, Election of 2024, Series 2025

Dated: Date of Delivery

Due: August 1, as shown herein

This cover page is not a summary of this issue; it is only a reference to the information contained in this Official Statement. Investors must read the entire Official Statement to obtain information essential to the making of an informed investment decision.

The Lowell Joint School District (Orange and Los Angeles Counties, California) General Obligation Bonds, Election of 2024, Series 2025 (the "Series 2025 Bonds") are being issued by the Lowell Joint School District (the "District"), located in the County of Orange, California ("Orange County") and the County of Los Angeles, California ("Los Angeles County" and together with Orange County, the "Counties"), under the laws of the State of California (the "State") and pursuant to a resolution of the Board of Trustees of the District adopted on August 4, 2025. Proceeds of the Series 2025 Bonds will be applied to (i) finance specific construction, reconstruction, rehabilitation, or replacement projects approved by the voters of the District, and (ii) pay costs of issuance of the Series 2025 Bonds, as further described herein. The Series 2025 Bonds were authorized at an election of the voters of the District held on November 5, 2024, at which at least 55% of the voters voting on the proposition authorized the issuance and sale of \$54,000,000 aggregate principal amount of bonds of the District.

The Series 2025 Bonds are payable from *ad valorem* property taxes to be levied within the District pursuant to the California Constitution and other State law. The Board of Supervisors of Orange County and the Board of Supervisors of Los Angeles County are empowered and obligated to levy *ad valorem* property taxes upon all property subject to taxation by the District that is located within such county, without limitation as to rate or amount (except as to certain personal property which is taxable at limited rates), for the payment of principal of and interest on the Series 2025 Bonds, all as more fully described herein. See "SECURITY AND SOURCE OF PAYMENT FOR THE SERIES 2025 BONDS" herein.

The Series 2025 Bonds will be issued as current interest bonds, in denominations of \$5,000 principal amount or any integral multiple thereof, as set forth on the inside front cover page hereof. Interest on the Series 2025 Bonds is payable on each February 1 and August 1 to maturity or earlier redemption thereof, commencing February 1, 2026. Principal of the Series 2025 Bonds is payable on August 1 in each of the years and in the amounts set forth on the inside front cover page hereof.

The Series 2025 Bonds will be issued in book-entry form only and will be initially issued and registered in the name of Cede & Co., as nominee for The Depository Trust Company, New York, New York ("DTC"). DTC will act as securities depository for the Series 2025 Bonds. Individual purchases of the Series 2025 Bonds will be made in book-entry form only. Purchasers will not receive physical delivery of the Series 2025 Bonds purchased by them. See "THE SERIES 2025 BONDS – Form and Registration" herein. Payments of the principal of and interest on the Series 2025 Bonds will be made by U.S. Bank Trust Company, National Association, as authenticating agent, bond registrar, transfer agent and paying agent with respect to the Series 2025 Bonds, to DTC for subsequent disbursement to DTC participants, who will remit such payments to the beneficial owners of the Series 2025 Bonds. See "THE SERIES 2025 BONDS – Payment of Principal and Interest" herein.

The Series 2025 Bonds are subject to redemption prior to maturity as described herein.* See "THE SERIES 2025 BONDS – Redemption" herein.

The Series 2025 Bonds will be sold and awarded by competitive bid to be held on [____], 2025, as set forth in the Official Notice of Sale, dated [____], 2025, relating to the Series 2025 Bonds. The Series 2025 Bonds will be offered when, as and if issued by the District, subject to the approval of legality by Orrick, Herrington & Sutcliffe LLP, Irvine, California, Bond Counsel to the District. Certain legal matters will be passed upon for the District by Orrick, Herrington & Sutcliffe LLP, Irvine, California, as

* Preliminary; subject to change.

Disclosure Counsel to the District. It is anticipated that the Series 2025 Bonds, in definitive form, will be available for delivery through the facilities of DTC on or about [____], 2025.

Dated: _____, 2025

MATURITY SCHEDULE*
BASE CUSIP†: 547541

\$35,000,000
LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
General Obligation Bonds, Election of 2024, Series 2025

\$ _____ **Serial Series 2025 Bonds**

<u>Maturity (August 1,)</u>	<u>Principal Amount</u>	<u>Interest Rate</u>	<u>Yield</u>	<u>CUSIP† Suffix</u>
2027	\$	%	%	
2028				
2029				
2030				
2031				
2032				
2033				
2034				
2035				
2036				
2037				
2038				
2039				
2040				
2041				
2042				
2043				
2044				
2045				
2046				
2047				
2048				
2049				
2050				
2051				
2052				
2053				
2054				
2055				

\$ _____ % **Term Series 2025 Bonds due August 1, 20__** – Yield _____ % – CUSIP† Suffix _____

\$ _____ % **Term Series 2025 Bonds due August 1, 20__** – Yield _____ % – CUSIP† Suffix _____

* Preliminary; subject to change.

† CUSIP® is a registered trademark of the American Bankers Association. CUSIP Global Services (CGS) is managed on behalf of the American Bankers Association by FactSet Research Systems Inc. Copyright© 2025 CUSIP Global Services. All rights reserved. CUSIP® data herein is provided by CGS database. This data is not intended to create a database and does not serve in any way as a substitute for the CGS database. CUSIP® numbers are provided for convenience of reference only. None of the District, the Initial Purchaser or their agents or counsel assume responsibility for the accuracy of such numbers.

LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)

BOARD OF TRUSTEES

Dr. Anthony A. Zegarra, *President*
Christine J. Berg, *Vice President*
Regina L. Woods, *Clerk*
Anastasia "Staci" M. Shackelford, *Member*
Karen L. Shaw, *Member*

DISTRICT ADMINISTRATORS

Jim Coombs, *Superintendent*
David Bennett, *Assistant Superintendent, Business Services*

PROFESSIONAL SERVICES

Municipal Advisor

Fieldman, Rolapp & Associates, Inc.
Irvine, California

Bond Counsel and Disclosure Counsel

Orrick, Herrington & Sutcliffe LLP
Irvine, California

Authenticating Agent, Bond Registrar, Transfer Agent and Paying Agent

U.S. Bank Trust Company, National Association
Los Angeles, California

This Official Statement does not constitute an offering of any security other than the original offering of the Series 2025 Bonds by the District. No dealer, broker, salesperson or other person has been authorized by the District to give any information or to make any representations other than as contained in this Official Statement, and if given or made, such other information or representation not so authorized should not be relied upon as having been given or authorized by the District.

The Series 2025 Bonds are exempt from registration under the Securities Act of 1933, as amended, pursuant to Section 3(a)(2) thereof. This Official Statement does not constitute an offer to sell or a solicitation of an offer to buy Series 2025 Bonds in any state in which such offer or solicitation is not authorized or in which the person making such offer or solicitation is not qualified to do so, or to any person to whom it is unlawful to make such offer or solicitation.

The information set forth herein other than that furnished by the District, although obtained from sources which are believed by the District to be reliable, is not guaranteed as to accuracy or completeness, and is not to be construed as a representation by the District. The information and expressions of opinions herein are subject to change without notice and neither delivery of this Official Statement nor any sale made hereunder shall, under any circumstances, create any implication that there has been no change in the affairs of the District since the date hereof. This Official Statement is submitted in connection with the sale of the Series 2025 Bonds referred to herein and may not be reproduced or used, in whole or in part, for any other purpose.

Certain statements included or incorporated by reference in this Official Statement constitute "forward-looking statements." Such statements are generally identifiable by the terminology used, such as "plan," "expect," "estimate," "budget," "intend" or other similar words. The achievement of certain results or other expectations contained in such forward-looking statements involve known and unknown risks, uncertainties and other factors which may cause actual results, performance or achievements described to be materially different from any future results, performance or achievements expressed or implied by such forward-looking statements. The District does not plan to issue any updates or revisions to those forward-looking statements if or when their expectations, or events, conditions or circumstances on which such statements are based, occur.

The District maintains a website. However, the information presented there is not part of this Official Statement and should not be relied upon in making an investment decision with respect to the Series 2025 Bonds.

In connection with this offering, the initial purchaser of the Series 2025 Bonds (the "Initial Purchaser") may overallocate or effect transactions which stabilize or maintain the market prices of the Series 2025 Bonds at levels above those that might otherwise prevail in the open market. Such stabilizing, if commenced, may be discontinued at any time. The Initial Purchaser may offer and sell the Series 2025 Bonds to certain securities dealers and dealer banks and banks acting as agent at prices lower than the public offering prices stated on the inside front cover page hereof and said public offering prices may be changed from time to time by the Initial Purchaser.

TABLE OF CONTENTS

	Page
INTRODUCTION	1
General.....	1
The District	2
Cybersecurity	2
THE SERIES 2025 BONDS	2
Authority for Issuance; Purpose.....	2
Form and Registration.....	3
Payment of Principal and Interest	3
Redemption	4
Defeasance of Series 2025 Bonds	6
Unclaimed Monies	7
Application and Investment of Series 2025 Bond Proceeds	7
Debt Service.....	9
Outstanding Bonds.....	10
Aggregate Debt Service	11
SECURITY AND SOURCE OF PAYMENT FOR THE SERIES 2025 BONDS	11
General.....	11
Statutory Lien on Taxes	12
Pledge of, Lien on and Security Interest in Tax Revenues	12
Property Taxation System.....	13
Assessed Valuation of Property Within the District	13
Tax Rates	22
Tax Charges and Delinquencies.....	23
Teeter Plan	25
Direct and Overlapping Debt	26
TAX MATTERS.....	27
OTHER LEGAL MATTERS.....	30
Legal Opinion	30
Legality for Investment in California	30
Continuing Disclosure	30
Litigation.....	30

TABLE OF CONTENTS
(continued)

	Page
FINANCIAL STATEMENTS	31
MISCELLANEOUS	31
Rating	31
Professionals Involved in the Offering	31
Underwriting	31
ADDITIONAL INFORMATION	32
APPENDIX A INFORMATION RELATING TO THE DISTRICT’S OPERATIONS AND BUDGET	A-1
APPENDIX B FINANCIAL STATEMENTS OF THE DISTRICT FOR THE FISCAL YEAR ENDED JUNE 30, 2024	B-1
APPENDIX C PROPOSED FORM OF OPINION OF BOND COUNSEL	C-1
APPENDIX D FORM OF CONTINUING DISCLOSURE CERTIFICATE	D-1
APPENDIX E ORANGE COUNTY TREASURY POOL	E-1
APPENDIX F ORANGE COUNTY CALIFORNIA 2025 INVESTMENT POLICY	F-1
APPENDIX G BOOK-ENTRY ONLY SYSTEM	G-1

\$35,000,000*
LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
General Obligation Bonds, Election of 2024, Series 2025

INTRODUCTION

This introduction is not a summary of this Official Statement. It is only a brief description of and guide to, and is qualified by, more complete and detailed information contained in the entire Official Statement, including the cover page, inside cover page and appendices hereto, and the documents summarized or described herein. A full review should be made of the entire Official Statement. The offering of the Series 2025 Bonds to potential investors is made only by means of the entire Official Statement.

General

This Official Statement, which includes the cover page, inside cover page and appendices hereto, is provided to furnish information in connection with the sale of \$35,000,000* aggregate principal amount of Lowell Joint School District (Orange and Los Angeles Counties, California) General Obligation Bonds, Election of 2024, Series 2025 (the “Series 2025 Bonds”), all as indicated on the inside cover page hereof, to be offered by the Lowell Joint School District (the “District”).

This Official Statement speaks only as of its date, and the information contained herein is subject to change. The District has no obligation to update the information in this Official Statement, except as required by the Continuing Disclosure Certificate to be executed by the District. See “OTHER LEGAL MATTERS – Continuing Disclosure” and APPENDIX D – “FORM OF CONTINUING DISCLOSURE CERTIFICATE.”

The Series 2025 Bonds are general obligation bonds of the District secured by and payable from *ad valorem* property taxes to be levied upon all property subject to taxation by the District, without limitation as to rate or amount (except as to certain personal property which is taxable at limited rates). The Series 2025 Bonds are not a debt or obligation of the County of Orange (“Orange County”) or the County of Los Angeles (“Los Angeles County” and together with Orange County, the “Counties” and each a “County”) or of the general fund of the District. See “SECURITY AND SOURCE OF PAYMENT FOR THE SERIES 2025 BONDS.”

The purpose of this Official Statement is to supply information to prospective buyers of the Series 2025 Bonds. Quotations from and summaries and explanations of the Series 2025 Bonds, the Resolution (as defined herein) of the Board of Trustees of the District providing for the issuance of the Series 2025 Bonds, and the constitutional provisions, statutes and other documents described herein, do not purport to be complete, and reference is hereby made to said documents, constitutional provisions and statutes for the complete provisions thereof.

Any statements in this Official Statement involving matters of opinion, whether or not expressly so stated, are intended as such and not as representations of fact. This Official Statement is not to be construed as a contract or agreement between the District and the purchasers or owners of any of the Series 2025 Bonds.

* Preliminary; subject to change.

Copies of documents referred to herein and information concerning the Series 2025 Bonds are available from the District by contacting: Lowell Joint School District, 11019 Valley Home Avenue, Whittier, California 90603, Attention: Superintendent. The District may impose a charge for copying, handling and mailing such requested documents.

The District

The District was established in 1906 and is located in the northwest portion of the Orange County and the southeastern portion of Los Angeles County and serves families from the cities of La Habra, La Habra Heights, La Mirada, Whittier and unincorporated areas of Orange County and Los Angeles County. The District operates five elementary schools, serving transitional kindergarten through sixth grade, and one intermediate school, serving seventh through eighth grade. Total enrollment in the District was approximately 2,981 students in fiscal year 2024-25. As of the preparation of the District's fiscal year 2025-26 original budget, total enrollment in the District is budgeted to be approximately 2,971 students in fiscal year 2025-26. The District operates under the jurisdiction of the Orange County Superintendent of Schools. Total assessed valuation of taxable property in the District in fiscal year 2024-25 is approximately \$6.33 billion. For additional information about the District, see APPENDIX A – "INFORMATION RELATING TO THE DISTRICT'S OPERATIONS AND BUDGET" and APPENDIX B – "FINANCIAL STATEMENTS OF THE DISTRICT FOR THE FISCAL YEAR ENDED JUNE 30, 2024."

Cybersecurity

School districts, like other governmental and business entities, face significant risks relating to the use and application of computer software and hardware for educational, operational and management purposes. The District also collects, processes, and distributes an enormous amount of private, protected and personal information on students, staff, parents, visitors, vendors and contractors. As the custodian of such information, the District has faced and may face in the future cybersecurity threats, attacks or incidents from time to time, as more fully described in Appendix A hereto. Moreover, the District relies on other entities and service providers in the course of operating the District, including the Counties with respect to the levy and collection of *ad valorem* property taxes and their servers and systems for accounting and other matters, as well as other trustees, fiscal agents, dissemination agents and project management firms. No assurance can be given that future cyber threats or attacks against the District or third-party entities or service providers will not directly or indirectly impact the District or the Owners of the Series 2025 Bonds, including the possibility of impacting the timely payments of debt service on the Series 2025 Bonds or timely filings pursuant to the District's continuing disclosure undertakings. See APPENDIX A – "INFORMATION RELATING TO THE DISTRICT'S OPERATIONS AND BUDGET – THE DISTRICT – Cybersecurity."

THE SERIES 2025 BONDS

Authority for Issuance; Purpose

Authority for Issuance. The Series 2025 Bonds are issued by the District under the provisions of California Government Code Section 53506 *et seq.*, including Section 53508.7 thereof, and California Education Code Sections 15140 and 15146 and Article XIII A of the Constitution of the State of California (the "California Constitution") and pursuant to a resolution of the Board of Trustees of the District, adopted on August 4, 2025 (the "Resolution").

Purpose. At an election held on November 5, 2024, the District received approval by at least 55% of the votes cast by eligible voters within the District to issue general obligation bonds of the District in an aggregate principal amount not to exceed \$54,000,000 to provide safe, modern elementary and intermediate

schools; construct, repair and update classrooms, science labs and school facilities to support student achievement and college and career readiness in math, science, technology, arts and engineering; improve disabled student access; and replace deteriorating portables with permanent classrooms (collectively, the “2024 Authorization”). The Series 2025 Bonds represent the first series of authorized bonds to be issued under the 2024 Authorization. Proceeds of the Series 2025 Bonds will be applied to (i) finance specific construction, reconstruction, rehabilitation, or replacement projects approved by the voters of the District under the 2024 Authorization, and (ii) pay costs of issuance of the Series 2025 Bonds. See “— Application and Investment of Series 2025 Bond Proceeds” herein. Prior to the issuance of the Series 2025 Bonds, the District has \$54,000,000 aggregate principal amount of bonds authorized but unissued under the 2024 Authorization.

Pursuant to the Resolution, the term “Bonds” means all bonds, including the Series 2025 Bonds and refunding bonds, of the District heretofore or hereafter issued pursuant to the voter-approved measures of the District, including bonds approved by the voters of the District on November 6, 2018, and pursuant to the 2024 Authorization.

Form and Registration

The Series 2025 Bonds will be issued in fully registered form only, without coupons, in denominations of \$5,000 principal amount or integral multiples thereof. The Series 2025 Bonds will initially be registered in the name of Cede & Co., as nominee of The Depository Trust Company (“DTC”), New York, New York. DTC will act as securities depository of the Series 2025 Bonds. Purchases of the Series 2025 Bonds under the DTC book-entry system must be made by or through a DTC participant, and ownership interests in the Series 2025 Bonds will be recorded as entries on the books of said participants. Except in the event that use of this book-entry system is discontinued for the Series 2025 Bonds, beneficial owners of the Series 2025 Bonds (“Beneficial Owners”) will not receive physical certificates representing their ownership interests. See APPENDIX G – “BOOK-ENTRY ONLY SYSTEM.”

Payment of Principal and Interest

Interest. The Series 2025 Bonds will be dated as of their date of delivery, and bear interest at the rates set forth on the inside front cover page of this Official Statement. Interest on the Series 2025 Bonds is payable on February 1 and August 1 of each year (each, an “Interest Payment Date”), commencing on February 1, 2026. Interest on the Series 2025 Bonds is computed on the basis of a 360-day year consisting of twelve 30-day months. Each Series 2025 Bond will bear interest from the Interest Payment Date of such Series 2025 Bond next preceding the date of authentication thereof, unless it is authenticated after the close of business on the 15th day of the calendar month immediately preceding an Interest Payment Date for such Series 2025 Bond (the “Record Date”) and on or prior to the succeeding Interest Payment Date for such Series 2025 Bond, in which event it will bear interest from such Interest Payment Date for such Series 2025 Bond, or unless it is authenticated on or before the Record Date preceding the first Interest Payment Date for such Series 2025 Bond, in which event it will bear interest from its dated date; provided, however, that if, at the time of authentication of any Series 2025 Bond, interest is in default on any outstanding Series 2025 Bonds, such Series 2025 Bond will bear interest from the Interest Payment Date for such Series 2025 Bond to which interest has previously been paid or made available for payment on the outstanding Series 2025 Bonds.

Payment of Series 2025 Bonds. The principal of the Series 2025 Bonds is payable in lawful money of the United States of America to the registered owner thereof (the “Owner”), upon the surrender thereof at the principal corporate trust office of U.S. Bank Trust Company, National Association, as authenticating agent, bond registrar, transfer agent and paying agent with respect to the Series 2025 Bonds (the “Paying Agent”) at the maturity thereof or upon redemption prior to maturity.

Redemption*

Mandatory Sinking Fund Redemption. The \$_____ term Series 2025 Bonds maturing on August 1, 20__ are subject to mandatory sinking fund redemption on August 1 in each of the years and in the respective principal amounts as set forth in the following schedule, at a redemption price equal to 100% of the principal amount thereof to be redeemed, together with interest accrued thereon to the date fixed for redemption, without premium:

The principal amount of the \$_____ term Series 2025 Bonds maturing on August 1, 20__, to be redeemed in each year shown above will be reduced proportionately, or as otherwise directed by the District, in integral multiples of \$5,000, by any portion of such term Series 2025 Bonds optionally redeemed prior to the mandatory sinking fund redemption date.

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The \$_____ term Series 2025 Bonds maturing on August 1, 20__ are subject to mandatory sinking fund redemption on August 1 in each of the years and in the respective principal amounts as set forth in the following schedule, at a redemption price equal to 100% of the principal amount thereof to be redeemed, together with interest accrued thereon to the date fixed for redemption, without premium:

Mandatory Sinking Fund Redemption Date (August 1,)	Principal Amount to be Redeemed
_____	\$
†	

† Maturity.	

The principal amount of the \$_____ term Series 2025 Bonds maturing on August 1, 20__, to be redeemed in each year shown above will be reduced proportionately, or as otherwise directed by the District, in integral multiples of \$5,000, by any portion of such term Series 2025 Bonds optionally redeemed prior to the mandatory sinking fund redemption date.

Selection of Series 2025 Bonds for Redemption. If less than all of the Series 2025 Bonds, if any, are subject to optional redemption and are called for redemption, such Series 2025 Bonds will be redeemed in inverse order of maturities or as otherwise directed by the District. Whenever less than all of the outstanding Series 2025 Bonds of any one maturity are designated for redemption, the Paying Agent will select the outstanding Series 2025 Bonds of such maturity to be redeemed by lot in any manner deemed fair by the Paying Agent. For purposes of such selection, each Series 2025 Bond will be deemed to consist of individual Series 2025 Bonds of denominations of \$5,000 principal amount, each, which may be separately redeemed.

Notice of Redemption. Notice of redemption of any Series 2025 Bond will be given by the Paying Agent, postage prepaid, not less than 20 nor more than 60 days prior to the redemption date (i) by first class mail to Orange County and the respective Owners thereof at the addresses appearing on the bond registration books, and (ii) as may be further required in accordance with the Continuing Disclosure Certificate with respect to the Series 2025 Bonds. See APPENDIX D – “FORM OF CONTINUING DISCLOSURE CERTIFICATE.”

Each notice of redemption is required to contain the following information: (i) the date of such notice; (ii) the name of the Series 2025 Bonds and the date of issue of such Series 2025 Bonds; (iii) the redemption date; (iv) the redemption price; (v) the dates of maturity or maturities of Series 2025 Bonds to be redeemed; (vi) if less than all of the Series 2025 Bonds of any maturity are to be redeemed the distinctive numbers of the Series 2025 Bonds of each maturity to be redeemed; (vii) in the case of Series 2025 Bonds redeemed in part only, the respective portions of the principal amount of the Series 2025 Bonds of each maturity to be redeemed; (viii) the CUSIP number, if any, of each maturity of Series 2025 Bonds to be redeemed; (ix) a statement that such Series 2025 Bonds must be surrendered by the Owners at the principal corporate trust office of the Paying Agent, or at such other place or places designated by the Paying Agent; (x) notice that further interest on such Series 2025 Bonds will not accrue after the designated redemption date; and (xi) in the case of a conditional notice, that such notice is conditioned upon certain circumstances and the manner of rescinding such conditional notice. Neither the failure to receive such notice, nor any defect in the notice given, will affect the sufficiency of the proceedings for the redemption of the Series 2025 Bonds called for redemption or the cessation of interest on the date fixed for redemption.

Effect of Notice of Redemption. When notice of redemption has been given substantially as described above and when the redemption price of the Series 2025 Bonds called for redemption is set aside for the purpose of redeeming the Series 2025 Bonds, the Series 2025 Bonds designated for redemption become due and payable on the specified redemption date and interest ceases to accrue thereon as of the redemption date, and upon presentation and surrender of such Series 2025 Bonds at the place specified in the notice of redemption, such Series 2025 Bonds are to be redeemed and paid at the redemption price thereof out of the money provided therefor. The Owners of such Series 2025 Bonds so called for redemption after such redemption date will look for the payment of such Series 2025 Bonds and the redemption premium thereon, if any, only from monies on deposit for such purpose in the interest and sinking fund of the District established for the Series 2025 Bonds within the Orange County treasury (the "Interest and Sinking Fund") or the trust fund established for such purpose. All Series 2025 Bonds redeemed are to be cancelled forthwith by the Paying Agent and are not to be reissued.

Right to Rescind Notice. The District may rescind any optional redemption and notice thereof for any reason on any date prior to the date fixed for redemption by causing written notice of the rescission to be given to the Owners of the Series 2025 Bonds so called for redemption. Any optional redemption and notice thereof is to be rescinded if for any reason on the date fixed for redemption monies are not available in the Interest and Sinking Fund or otherwise held in trust for such purpose in an amount sufficient to pay in full on said date the principal of, interest, and any premium due on the Series 2025 Bonds called for redemption. Notice of rescission of redemption is to be given in the same manner in which notice of redemption was originally given. The actual receipt by the Owner of any Series 2025 Bond of notice of such rescission is not a condition precedent to rescission, and failure to receive such notice or any defect in such notice does not affect the validity of the rescission.

Funds for Redemption. Prior to or on the redemption date of any Series 2025 Bonds there is to be available in the Interest and Sinking Fund, or held in trust for such purpose as provided by law, monies for the purpose and sufficient to redeem, at the redemption prices as provided in the Resolution, the Series 2025 Bonds designated in the notice of redemption. Such monies are to be applied on or after the redemption date solely for payment of principal of, interest and premium, if any, on the Series 2025 Bonds to be redeemed upon presentation and surrender of such Series 2025 Bonds, provided that all monies in the Interest and Sinking Fund are to be used for the purposes established and permitted by law. Any interest due on or prior to the redemption date is to be paid from the Interest and Sinking Fund, unless otherwise provided to be paid from such monies held in trust. If, after all of the Series 2025 Bonds have been redeemed and cancelled or paid and cancelled, there are monies remaining in the Interest and Sinking Fund or otherwise held in trust for the payment of the redemption price of the Series 2025 Bonds, the monies are to be held in or returned or transferred to any interest and sinking fund of the District for payment of any outstanding Bonds of the District payable from such fund; provided, however, that if the monies are part of the proceeds of Bonds of the District, the monies are to be transferred to the fund created for the payment of principal of and interest on such Bonds. If no such Bonds of the District are at such time outstanding, the monies are to be transferred to the general fund of the District as provided and permitted by law.

Defeasance of Series 2025 Bonds

The Resolution provides that if at any time the District will pay or cause to be paid or there will otherwise be paid to the Owners of any or all of the outstanding Series 2025 Bonds all or any part of the principal of and interest and premium, if any, on the Series 2025 Bonds at the times and in the manner provided in the Resolution and in the Series 2025 Bonds, or as described in the following paragraph, or as otherwise provided by law consistent with the provisions of the Resolution, then such Owners of such Series 2025 Bonds will cease to be entitled to the obligation of the District and of each County to levy and collect property taxes to pay the Series 2025 Bonds as provided in the Resolution, and such obligation and all agreements and covenants of the District to such Owners under the Resolution and under the Series 2025

Bonds will thereupon be satisfied and discharged and will terminate, except only that the District will remain liable for payment of all principal, interest and premium, if any, represented by the Series 2025 Bonds, but only out of monies on deposit in the Interest and Sinking Fund or otherwise held in trust for such payment; and provided further, however, that the provisions of the Resolution described below under “– Unclaimed Monies” will apply.

The District may pay and discharge any or all of the Series 2025 Bonds by depositing in trust with the Paying Agent or an escrow agent selected by the District, at or before maturity, money or non-callable direct obligations of the United States of America (including zero interest bearing State and Local Government Series) or other non-callable obligations the payment of the principal of and interest on which is guaranteed by a pledge of the full faith and credit of the United States of America, in an amount which will, together with the interest to accrue thereon and available monies then on deposit in the Interest and Sinking Fund, be fully sufficient to pay and discharge the indebtedness on such Series 2025 Bonds (including all principal, interest and redemption premiums) at or before their respective maturity dates.

Unclaimed Monies

Any money held in any fund created pursuant to the Resolution, or by the Paying Agent or an escrow agent in trust for the payment of the principal of, redemption premium, if any, or interest on the Series 2025 Bonds and remaining unclaimed for two years after the principal of all of the Series 2025 Bonds has become due and payable (whether by maturity or upon prior redemption) is required to be transferred to any interest and sinking fund of the District for payment of any outstanding Bonds of the District payable from such fund; or, if no such Bonds of the District are at such time outstanding, the monies are required to be transferred to the general fund of the District as provided and permitted by law.

Application and Investment of Series 2025 Bond Proceeds

The proceeds of the Series 2025 Bonds are expected to be applied as follows:

**LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
General Obligation Bonds, Election of 2024, Series 2025**

Estimated Sources and Uses of Funds

Sources of Funds:

Aggregate Principal Amount of Series 2025 Bonds	\$
Plus [Net] Original Issue Premium	
Total Sources of Funds	\$

Uses of Funds:

Deposit to Building Fund	\$
Deposit to Interest and Sinking Fund ⁽¹⁾	
Costs of Issuance ⁽²⁾	
Initial Purchaser's Discount	
Total Uses of Funds	\$

⁽¹⁾ Consists of premium received by the District.

⁽²⁾ Includes legal fees, municipal advisor fees, rating agency fee, printing fees and other miscellaneous expenses.

Under State law, all money received by or apportioned to a school district must generally be paid into and held in the county treasury. The proceeds from the sale of the Series 2025 Bonds received by the

District, except for certain amounts permitted to be held and disbursed by a costs of issuance administrator and exclusive of any premium and accrued interest received by the District, will be deposited in the Orange County treasury (the "Orange County Treasury") to the credit of the building fund of the District established for the Series 2025 Bonds (the "Building Fund") and will be accounted for separately from all other District and Orange County funds. Such proceeds will be applied solely for the purposes for which the Series 2025 Bonds were authorized. Any premium or accrued interest on the Series 2025 Bonds received by the District will be deposited in the Interest and Sinking Fund in the Orange County Treasury. Taxes collected to pay principal and interest on the Series 2025 Bonds will also be deposited in the Interest and Sinking Fund. Earnings on the investment of monies in either fund will be retained in that fund and used only for the purpose to which that fund may lawfully be applied. Monies in the Building Fund may only be applied for the purposes for which the Series 2025 Bonds were authorized. Monies in the Interest and Sinking Fund may only be applied to pay principal, interest and redemption premium, if any, on the Series 2025 Bonds.

All funds held by the Orange County Treasury in the Building Fund and the Interest and Sinking Fund are expected to be invested at the sole discretion of the Board of Supervisors of Orange County on behalf of the District in such investments as are authorized by Section 53601 *et seq.* of the California Government Code and the investment policy of Orange County, as either may be amended or supplemented from time to time. See APPENDIX E – "ORANGE COUNTY TREASURY POOL" and APPENDIX F – "ORANGE COUNTY CALIFORNIA 2025 INVESTMENT POLICY" for a description of the permitted investments under the investment policy of Orange County. In addition, to the extent permitted by law and the investment policy of Orange County, the District may request in writing that all or any portion of the funds held in the Building Fund may be invested in investment agreements, including guaranteed investment contracts, float contracts or other investment products which comply with the requirements of each rating agency then rating the Series 2025 Bonds. The Board of Supervisors of Orange County does not monitor such investments for arbitrage compliance and does not perform any arbitrage calculations with respect to such investments.

Debt Service

Annual debt service on the Series 2025 Bonds, assuming no early optional redemptions, is set forth in the following table.

LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
General Obligation Bonds, Election of 2024, Series 2025

Period Ending (August 1,)	Principal	Interest	Total Debt Service
2026	\$	\$	\$
2027			
2028			
2029			
2030			
2031			
2032			
2033			
2034			
2035			
2036			
2037			
2038			
2039			
2040			
2041			
2042			
2043			
2044			
2045			
2046			
2047			
2048			
2049			
2050			
2051			
2052			
2053			
2054			
2055			
Total:	\$	\$	\$

Source: Fieldman, Rolapp & Associates, Inc..

Outstanding Bonds

In addition to the Series 2025 Bonds, the District has two series of general obligation bonds outstanding, each of which is secured by *ad valorem* property taxes levied upon all property subject to taxation by the District.

2018 Authorization. At an election held on November 6, 2018, the District received authorization by at least 55% of the votes cast by eligible voters within the District under Measure LL to issue bonds of the District in an aggregate principal amount not to exceed \$48,000,000 to repair and modernize aging classrooms/school facilities at local elementary/intermediate schools, repair termite damage, dry rot, deteriorating roofs, plumbing, and electrical, improve student safety/security, and upgrade classrooms, science labs, and facilities to support student achievement in math, science, technology, and arts (collectively, the “2018 Authorization”). On July 16, 2019, the District issued \$14,000,000 aggregate principal amount of its General Obligation Bonds, Election of 2018, Series 2019 Bonds (the “Series 2019 Bonds”), as the District’s first series of bonds to be issued under the 2018 Authorization. On October 28, 2020, the District issued \$34,000,000 aggregate principal amount of its General Obligation Bonds, Election of 2018, Series 2020 (the “Series 2020 Bonds”), as the District’s second and final series of bonds to be issued under the 2018 Authorization.

2024 Authorization. As indicated above, at an election held on November 5, 2024, the District received approval by at least 55% of the votes cast by eligible voters within the District to issue general obligation bonds of the District in an aggregate principal amount not to exceed \$54,000,000 to provide safe, modern elementary and intermediate schools; construct, repair and update classrooms, science labs and school facilities to support student achievement and college and career readiness in math, science, technology, arts and engineering; improve disabled student access; and replace deteriorating portables with permanent classrooms (collectively, the “2024 Authorization”). The Series 2025 Bonds represent the first series of authorized bonds to be issued under the 2024 Authorization.

A summary of the District’s outstanding general obligation bonded debt is set forth on the following page.

Aggregate Debt Service

Debt Service on each series of the District's outstanding bonds, assuming no early redemptions, is shown in the following table.

LOWELL JOINT SCHOOL DISTRICT (Orange and Los Angeles Counties, California) General Obligation Bonds – Aggregate Debt Service

Period Ending (August 1,) ⁽¹⁾	Series 2019 Bonds	Series 2020 Bonds	Series 2025 Bonds	Aggregate Total Debt Service
2026	\$487,087.50	1,143,450.00		
2027	502,837.50	1,191,950.00		
2028	522,587.50	1,237,700.00		
2029	546,087.50	1,285,700.00		
2030	568,087.50	1,335,700.00		
2031	588,587.50	1,392,450.00		
2032	612,587.50	1,445,450.00		
2033	639,837.50	1,499,700.00		
2034	660,087.50	1,564,950.00		
2035	688,587.50	1,625,450.00		
2036	714,837.50	1,691,200.00		
2037	747,237.50	1,756,700.00		
2038	773,287.50	1,831,700.00		
2039	808,137.50	1,896,700.00		
2040	836,487.50	1,977,300.00		
2041	873,487.50	2,056,350.00		
2042	908,837.50	2,136,800.00		
2043	942,537.50	2,220,575.00		
2044	979,587.50	2,311,650.00		
2045	1,019,837.50	2,402,475.00		
2046	1,060,912.50	2,500,093.76		
2047	1,104,712.50	2,594,268.76		
2048	1,146,075.00	2,705,000.00		
2049	-	3,943,750.00		
2050	-	4,100,000.00		
2051	-	-		
2052	-	-		
2053	-	-		
2054	-	-		
2055	-	-		
Total	<u>\$17,732,350.00</u>	<u>\$49,847,062.52</u>	<u>\$</u>	<u>\$</u>

⁽¹⁾ Debt service figures for period ending August 1, 2026 include payments made on February 1, 2025.
Source: Fieldman, Rolapp & Associates, Inc.

SECURITY AND SOURCE OF PAYMENT FOR THE SERIES 2025 BONDS

General

In order to provide sufficient funds for repayment of principal and interest when due on the Series 2025 Bonds, the Board of Supervisors of Orange County and the Board of Supervisors of Los Angeles County are empowered and are obligated to levy *ad valorem* property taxes upon all property subject to taxation by the District that is located within such county, without limitation as to rate or amount (except as to certain personal property which is taxable at limited rates) for the payment of principal of and interest on the Series 2025 Bonds.

In the case of a school district, like the District, lying in two or more counties, the assessor of each of the counties in which the district lies, must annually certify to the board of supervisors of each of the counties in which any portion of the school district is situated the assessed value of all taxable property in the county situated in the school district. Each board of supervisors must levy upon the property of the school district within its own county the rate of tax that will be sufficient to raise not less than the amount needed to pay the interest and any portion of the principal of the general obligation bonds that is to become due during the year when combined with the taxes raised by all other counties in which a portion of the district lies. Such taxes are in addition to but separate from other taxes levied upon property within the District that are deposited by such counties into the school district's general fund. When collected, the tax revenues with respect to each voter-approved bond measure of the District for the payment of Bonds issued under such bond measure will be deposited by both Counties in the interest and sinking fund of the District related to such bond measure and established for such Bonds, which is required to be maintained by Orange County as the county whose superintendent of schools has jurisdiction over the District, and to be used solely for the payment of the principal or redemption price of and interest on such Bonds.

The Series 2025 Bonds are payable from *ad valorem* property taxes to be levied within the District pursuant to the California Constitution and other State law, and are not a debt or obligation of either County. No fund of either County is pledged or obligated to repayment of the Series 2025 Bonds.

Statutory Lien on Taxes

Pursuant to Section 53515 of the California Government Code (which became effective on January 1, 2016), all general obligation bonds issued by local agencies, including refunding bonds, are secured by a statutory lien on all revenues received pursuant to the levy and collection of the tax. Section 53515 provides that the lien will automatically arise, without the need for any action or authorization by the local agency or its governing board, and will be valid and binding from the time the bonds are executed and delivered. Section 53515 further provides that the revenues received pursuant to the levy and collection of the tax will be immediately subject to the lien, and the lien will immediately attach to the revenues and be effective, binding and enforceable against the local agency, its successor, transferees and creditors, and all others asserting rights therein, irrespective of whether those parties have notice of the lien and without the need for physical delivery, recordation, filing or further act.

This statutory lien, by its terms, secures not only the Series 2025 Bonds, but also any other bonds of the District payable, as to both principal and interest, from the proceeds of *ad valorem* property taxes that may be levied pursuant to paragraphs (2) and (3) of subdivision (b) of Section 1 of Article XIII A of the California Constitution. The statutory lien provision does not specify the relative priority of obligations so secured or a method of allocation in the event that the revenues received pursuant to the levy and collection of the tax are insufficient to pay all amounts then due and owing that are secured by the statutory lien. For information on outstanding bonds of the District, see "THE SERIES 2025 BONDS – Outstanding Bonds" above.

Pledge of, Lien on and Security Interest in Tax Revenues

As provided in the Resolution, the District has pledged, and granted a lien on and security interest in, all revenues from the property taxes collected from the levy by the Board of Supervisors of Orange County and the Board of Supervisors of Los Angeles County with respect to each voter-approved bond measure of the District for the payment of Bonds issued under such bond measure and all amounts on deposit in any interest and sinking fund of the District related to such bond measure with respect to the Bonds of such bond measure, in order to secure the payment of the principal or redemption price of and interest on such Bonds. Pursuant to the Resolution, such pledge and grant is valid and binding from the date of the Resolution for the benefit of the Owners of the Bonds and successors thereto. The Resolution provides

that the property taxes and amounts held in any interest and sinking fund of the District will be immediately subject to this pledge and grant, and the pledge and grant will constitute a lien and security interest which will immediately attach to (a) the property taxes and (b) the amounts held in any interest and sinking fund of the District. Pursuant to the Resolution, this pledge and grant will secure the payment of such Bonds and will be effective, binding, and enforceable against the District, its successors, creditors and all others irrespective of whether those parties have notice of the pledge or grant and without the need of any physical delivery, recordation, filing, or further act. The Resolution provides that this pledge and grant constitutes an agreement between the District and the Owners of Bonds to provide security for the Bonds in addition to any statutory lien that may exist, and the Bonds secured by the pledge and grant are or were issued to finance (or refinance) one or more of the projects specified in the applicable voter-approved measure.

The pledge of and grant of a lien on and security interest in tax revenues provided for in the Resolution specifies that said pledge and grant secures the Series 2025 Bonds and other general obligations bonds, including refunding bonds, previously issued or that may be issued in the future pursuant to the related voter-approved measure. Previous general obligation bonds of the District have been issued under resolutions that pledge and grant a lien on and security interest in tax revenues to secure the general obligation bonds and the general obligation refunding bonds issued thereunder, and the District may provide for a similar pledge and grant of a lien on and security interest in tax revenues in resolutions adopted in the future that authorize general obligation bonds and general obligation refunding bonds. The Resolution does not specify the relative priority of obligations so secured or a method of allocation in the event that the revenues received pursuant to the levy and collection of the tax are insufficient to pay all amounts then due and owing that are secured by the pledge of and grant of a lien on and security interest in such tax revenues.

Property Taxation System

Property tax revenues result from the application of the appropriate tax rate to the total assessed value of taxable property in the District. School districts receive property taxes for payment of voter-approved bonds as well as for general operating purposes.

Local property taxation is the responsibility of various county officers. School districts, like the District, whose boundaries extend into more than one county are treated for property tax purposes as separate jurisdictions in each county in which they are located. For each school district located in a county, the county assessor computes the value of locally assessed taxable property. Based on the assessed value of property and the scheduled debt service on outstanding bonds in each year calculated by each county, the county auditor-controller computes the rate of tax necessary to pay such debt service in all counties wherein such district is located, and presents the tax rolls (including rates of tax for all taxing jurisdictions in the respective county) to the respective county board of supervisors for approval. The county treasurer-tax collector prepares and mails tax bills to taxpayers and collects the taxes. Both the county auditor-controller and the county treasurer-tax collector of the county, the superintendent of schools of which has jurisdiction over the school district, have accounting responsibilities related to the collecting of the property taxes. Once collected, the county auditor-controller apportions and distributes the taxes to the various taxing entities and related funds and accounts. The county treasurer-tax collector, the superintendent of schools of which has jurisdiction over the school district, holds school district funds, including taxes collected for payment of school bonds, and is charged with payment of principal of and interest on the school bonds when due, as *ex-officio* treasurer of the school district.

Assessed Valuation of Property Within the District

General. Taxable property located in the District has a fiscal year 2024-25 assessed value of \$6,328,539,305. All property (real, personal and intangible) is taxable unless an exemption is granted by the California Constitution or United States law. Under the California Constitution, exempt classes of

property include household and personal effects, intangible personal property (such as bank accounts, stocks and bonds), business inventories, and property used for religious, hospital, scientific and charitable purposes. The State Legislature may create additional exemptions for personal property, but not for real property. Most taxable property is assessed by the assessor of the county in which the property is located. Some special classes of property are assessed by the State Board of Equalization, as described below.

Taxes are levied for each fiscal year on taxable real and personal property assessed as of the preceding January 1, at which time the lien attaches. The assessed value is required to be adjusted during the course of the year when property changes ownership or new construction is completed. State law also affords an appeal procedure to taxpayers who disagree with the assessed value of any property. When necessitated by changes in assessed value during the course of a year, a supplemental assessment is prepared so that taxes can be levied on the new assessed value before the next regular assessment roll is completed. See “— *Appeals of Assessed Valuation; Blanket Reductions of Assessed Values*” below.

Under the California Constitution, the State Board of Equalization assesses property of State-regulated transportation and communications utilities, including railways, telephone and telegraph companies, and companies transmitting or selling gas or electricity. The Board of Equalization also is required to assess pipelines, flumes, canals and aqueducts lying within two or more counties. The value of property assessed by the Board of Equalization is allocated by a formula to local jurisdictions in each county, including school districts, and taxed by the local county tax officials in the same manner as for locally assessed property. Taxes on privately owned railway cars, however, are levied and collected directly by the Board of Equalization. Property used in the generation of electricity by a company that does not also transmit or sell that electricity is taxed locally instead of by the Board of Equalization. Thus, the reorganization of regulated utilities and the transfer of electricity-generating property to non-utility companies, as often occurred under electric power deregulation in the State, affects how those assets are assessed, and which local agencies benefit from the property taxes derived. In general, the transfer of State-assessed property located in the District to non-utility companies will increase the assessed value of property in the District, since the property’s value will no longer be divided among all taxing jurisdictions in the applicable county. The transfer of property located and taxed in the District to a State-assessed utility will have the opposite effect: generally reducing the assessed value in the District, as the value is shared among the other jurisdictions in the applicable county. The District is unable to predict future transfers of State-assessed property in the District and the applicable county, the impact of such transfers on its utility property tax revenues, or whether future legislation or litigation may affect ownership of utility assets, the State’s methods of assessing utility property, or the method by which tax revenues of utility property is allocated to local taxing agencies within a county.

Locally taxed property is classified either as “secured” or “unsecured,” and is listed accordingly on separate parts of the assessment roll. The “secured roll” is that part of the assessment roll containing State-assessed property and property (real or personal) for which there is a lien on real property sufficient, in the opinion of the county assessor, to secure payment of the taxes. All other property is “unsecured,” and is assessed on the “unsecured roll.” Secured property assessed by the State Board of Equalization is commonly identified for taxation purposes as “utility” property.

The following tables set forth the assessed valuation of the various classes of property in the District's boundaries (in Orange County, in Los Angeles County, and in the aggregate) from fiscal years 2015-16 through 2024-25, each as of the date the equalized assessment roll is established in August of each year.

LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
Assessed Valuations
Fiscal Years 2015-16 through 2024-25

Orange County Portion

<u>Fiscal Year</u>	<u>Local Secured</u>	<u>Utility</u>	<u>Unsecured</u>	<u>Total Valuation</u>
2015-16	\$1,365,314,053	\$0	\$28,338,913	\$1,393,652,966
2016-17	1,437,036,530	0	26,088,181	1,463,124,711
2017-18	1,541,712,259	0	30,846,386	1,572,558,645
2018-19	1,662,546,838	0	34,360,902	1,696,907,740
2019-20	1,750,689,802	0	44,608,980	1,795,298,782
2020-21	1,856,670,650	0	40,507,735	1,897,178,385
2021-22	1,922,255,462	0	37,696,039	1,959,951,501
2022-23	2,129,614,985	0	47,324,578	2,176,939,563
2023-24	2,240,114,109	0	54,757,667	2,294,871,776
2024-25	2,343,954,246	0	53,464,326	2,397,418,572

Los Angeles County Portion

<u>Fiscal Year</u>	<u>Local Secured</u>	<u>Utility</u>	<u>Unsecured</u>	<u>Total Valuation</u>
2015-16	\$2,522,233,569	\$508	\$11,479,138	\$2,533,713,215
2016-17	2,630,721,105	16,596	12,348,602	2,643,086,303
2017-18	2,761,189,932	16,596	12,081,525	2,773,288,053
2018-19	2,941,689,690	16,596	11,850,902	2,953,557,188
2019-20	3,087,350,550	16,596	11,305,840	3,098,672,986
2020-21	3,206,444,465	22,128	11,320,405	3,217,786,998
2021-22	3,334,655,573	22,128	11,126,898	3,345,804,599
2022-23	3,553,585,989	22,128	14,854,357	3,568,462,474
2023-24	3,728,994,030	22,128	15,501,095	3,744,517,253
2024-25	3,915,718,000	9,144	15,393,589	3,931,120,733

Total District

<u>Fiscal Year</u>	<u>Local Secured</u>	<u>Utility</u>	<u>Unsecured</u>	<u>Total Valuation</u>
2015-16	\$3,887,547,622	\$508	\$39,818,051	\$3,927,366,181
2016-17	4,067,757,635	16,596	38,436,783	4,106,211,014
2017-18	4,302,902,191	16,596	42,927,911	4,345,846,698
2018-19	4,604,236,528	16,596	46,211,804	4,650,464,928
2019-20	4,838,040,352	16,596	55,914,820	4,893,971,768
2020-21	5,063,115,115	22,128	51,828,140	5,114,965,383
2021-22	5,256,911,035	22,128	48,822,937	5,305,756,100
2022-23	5,683,200,974	22,128	62,178,935	5,745,402,037
2023-24	5,969,108,139	22,128	70,258,762	6,039,389,029
2024-25	6,259,672,246	9,144	68,857,915	6,328,539,305

Source: California Municipal Statistics, Inc.

Risk of Decline in Property Values. Assessments may be adjusted during the course of the year when real property changes ownership or new construction is completed. Assessments may also be appealed by taxpayers seeking a reduction as a result of economic and other factors beyond the District's control,

such as a general market decline in property values, including potential market declines caused by the effects of a reclassification of property to a class exempt from taxation, whether by ownership or use (such as exemptions for property owned by State and local agencies and property used for qualified educational, hospital, charitable or religious purposes), the lack of availability or unaffordability of property or homeowners' insurance, pandemic, or the complete or partial destruction of taxable property caused by natural or manmade disaster, such as earthquake, drought, flood, landslide, liquefaction, levee failure, fire, toxic dumping, etc. When necessitated by changes in assessed value in the course of a year, taxes are prorated for each portion of the tax year. See also "*Appeals of Assessed Valuation; Blanket Reductions of Assessed Values*" below.

Risk of Changing Economic Conditions. Property values could be reduced by factors beyond the District's control, including a depressed real estate market due to general economic conditions in Orange County or Los Angeles County, the region, and the State. A pandemic, like the outbreak of the respiratory disease caused by the Coronavirus Disease 2019, which was declared a pandemic by the World Health Organization, may result in an economic recession or depression that causes a general market decline in property values therefore affecting the assessed value of property within the District. The lack of availability or unaffordability of property or homeowners' insurance may result in a disruption of the real estate market causing a general market decline in property values therefore affecting the assessed value of property within the District. Events resulting in changing economic conditions may also alter the willingness or the ability of local taxpayers to pay *ad valorem* property taxes levied to repay the District's Bonds. The District cannot predict whether events that may result in changing economic conditions will occur or the extent that a change in economic conditions will impact assessed value of property in the District or the willingness or ability of local taxpayers to pay *ad valorem* property taxes.

Risk of Climate Change. The change in the earth's average atmospheric temperature, generally referred to as "climate change," is expected to, among other things, increase the frequency of extreme weather events. The direct risks posed by climate change currently include or are expected to include more extreme heat events, increased incidence of wildfire and drought, rising sea levels, changes in precipitation levels, including flooding, and more intense storms. As greenhouse gas emissions continue to accumulate, climate change may intensify and increase the frequency of such extreme weather events. One or more of such extreme weather events could negatively impact the assessed value of the property within the District. The District cannot predict the timing, extent, or severity of climate change and its impact on property values in the District.

Risk of Earthquake. The District is located in a seismically active region. The most notable earthquake faults in the region include the San Andreas fault and over 100 smaller active faults in the area. Property values could be reduced by the complete or partial destruction of taxable property as a result of an earthquake.

Risk of Drought. Most recently, the State has experienced periods of extreme precipitation, after having experienced severe drought conditions that led to the Governor of California (the "Governor") declaring a Statewide drought emergency in spring 2021. While storms have helped ease drought impacts, regions and communities across the State continue to experience water supply shortages, especially communities that rely on groundwater supplies that have been severely depleted in recent years. In March 2023, the Governor rolled back some drought emergency provisions that are no longer needed due to current water conditions, while maintaining other measures that support regions and communities still facing water supply challenges, and that continue building up long-term water resilience. The District cannot predict the extent to which drought conditions within the Counties or any of the adjoining counties could cause reduced economic activity within the boundaries of the District or the extent to which drought conditions may impact District facilities or the assessed value of taxable property within the District.

Risk of Wildfire and Flooding. Property damage due to wildfire and flooding could result in significant damage to, destruction of, and significant decreases in the assessed value of taxable property within the boundaries of the District, as well as in damage to or destruction of District facilities and property. In recent years, portions of the State, including portions of the Counties and adjacent counties, have experienced wildfires that have burned thousands of acres and destroyed thousands of homes and structures. Notable incidents that have impacted the Counties and adjacent counties of Riverside, Ventura and San Bernardino in recent years include the Airport Fire, Blue Ridge Fire, Silverado Fire, Holy Fire, the Palisades Fire, the Eaton Fire, the Hughes Fire, the Woolsey Fire, the Lake Fire and the Bobcat Fire.

Recently, Los Angeles County has experienced several significant wildfires. The Palisades Fire, which started on January 7, 2025, burned approximately 23,448 acres of land in Los Angeles County and damaged or destroyed approximately 7,804 structures, and caused 12 civilian fatalities and four fire personnel and civilian injuries, according to the California Department of Forestry and Fire Protection (“Cal Fire”). The Palisades Fire is deemed as the most destructive in Los Angeles County’s history and the third most destructive in the State’s history. The Eaton Fire, which also started on January 7, 2025, burned approximately 14,021 acres of land in Los Angeles County and damaged or destroyed approximately 10,487 structures, and caused 17 civilian fatalities and nine fire personnel injuries, according to Cal Fire.

[Within the boundaries of the District, no facilities, structures or property were damaged or destroyed by the above wildfires or other recent wildfires. However, the District cannot predict the extent to which any future wildfires within the District, the Counties, or any of the adjoining counties could cause reduced economic activity within the boundaries of the District or the extent to which wildfires may impact District facilities or the assessed value of taxable property within the District. *]/District to confirm./*

Prospective purchasers of the Series 2025 Bonds should be aware that, notwithstanding any decrease in assessed valuation for any fiscal year, the Counties are required to levy sufficient taxes to pay debt service on the Series 2025 Bonds. The consequence of any decrease in assessed valuation is a corresponding increase in the tax rate on taxable property so that sufficient tax revenues may be collected from taxpayers to cover debt service on the Series 2025 Bonds in full. However, increases in tax rates may impact the ability or willingness of taxpayers to pay their property taxes. See “ – Tax Charges and Delinquencies” and “ – Teeter Plan” below.

Appeals of Assessed Valuation; Blanket Reductions of Assessed Values. There are two basic types of property tax assessment appeals provided for under State law. The first type of appeal, commonly referred to as a base year assessment appeal, involves a dispute on the valuation assigned by the assessor immediately subsequent to an instance of a change in ownership or completion of new construction. If the base year value assigned by the assessor is reduced, the valuation of the property cannot increase in subsequent years more than 2% annually unless and until another change in ownership and/or additional new construction or reconstruction activity occurs. Any base year appeal must be made within four years of the change of ownership or new construction date.

The second type of appeal, commonly referred to as a Proposition 8 appeal (which Proposition 8 was approved by the voters in 1978), can result if factors occur causing a decline in the market value of the property to a level below the property’s then-current taxable value (escalated base year value). Pursuant to State law, a property owner may apply for a Proposition 8 reduction of the property tax assessment for such owner’s property by filing a written application with the appropriate county board of equalization or assessment appeals board. A property owner desiring a Proposition 8 reduction of the assessed value of such owner’s property in any one year must submit an application to the county assessment appeals board (the “Appeals Board”). Following a review of the application by the county assessor’s office, the county assessor may offer to the property owner the opportunity to stipulate to a reduced assessment, or may confirm the assessment. If no stipulation is agreed to, and the applicant elects to pursue the appeal, the

matter is brought before the Appeals Board (or, in some cases, a hearing examiner) for a hearing and decision. The Appeals Board generally is required to determine the outcome of appeals within two years of each appeal's filing date. Any reduction in the assessment ultimately granted applies only to the year for which application is made and during which the written application is filed. The assessed value increases to its pre-reduction level (such pre-reduction level escalated by the annual inflation rate of no more than 2%) following the year for which the reduction application is filed. However, the county assessor has the power to grant a reduction not only for the year for which application was originally made, but also for the then-current year and any intervening years as well. In practice, such a reduced assessment may and often does remain in effect beyond the year in which it is granted.

In addition, Article XIII A of the California Constitution provides that the full cash value base of real property used in determining taxable value may be adjusted from year to year to reflect the inflationary rate, not to exceed a 2% increase for any given year, or may be reduced to reflect a reduction in the consumer price index or comparable local data. This measure is computed on a calendar year basis. According to representatives of the assessor's office in Orange County and Los Angeles County, such Counties have in the past, pursuant to Article XIII A of the California Constitution, ordered blanket reductions of assessed property values and corresponding property tax bills on single-family residential properties when the value of the property has declined below the current assessed value as calculated by each respective county.

No assurance can be given that property tax appeals and/or blanket reductions of assessed property values will not significantly reduce the assessed valuation of property within the District in the future.

See APPENDIX A – “INFORMATION RELATING TO THE DISTRICT’S OPERATIONS AND BUDGET – CONSTITUTIONAL AND STATUTORY PROVISIONS AFFECTING DISTRICT REVENUES AND APPROPRIATIONS – Limitations on Revenues” for a discussion of other limitations on the valuation of real property with respect to *ad valorem* property taxes.

Bonding Capacity. As an elementary school district, the District may issue bonds in an amount up to 1.25% of the assessed valuation of taxable property within its boundaries. The District's fiscal year 2024-25 gross bonding capacity (also commonly referred to as the “bonding limit” or “debt limit”) is approximately \$[] million and its net bonding capacity is approximately \$[] million (taking into account current outstanding debt before the issuance of the Series 2025 Bonds). Refunding bonds may be issued without regard to this limitation; however, once issued, the outstanding principal of any refunding bonds is included when calculating the District's bonding capacity.

Assessed Valuation by Jurisdiction. The following table describes the percentage and value of the total assessed valuation of the property within the District's boundaries by political jurisdiction in the cities of La Habra, La Habra Heights, La Mirada and Whittier and unincorporated portions of Los Angeles County for fiscal year 2024-25.

LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
Fiscal Year 2024-25 Assessed Valuation by Jurisdiction

	Assessed Valuation in District	% of District	Assessed Valuation of Jurisdiction	% of Jurisdiction in District
<u>Jurisdiction:</u>				
City of La Habra	\$2,397,418,572	37.88%	\$9,232,224,507	25.97%
City of La Habra Heights	1,715,410,925	27.11	\$1,876,050,122	91.44%
City of La Mirada	7,945,233	0.13	\$9,328,830,492	0.09%
City of Whittier	1,039,861,256	16.43	\$13,837,965,219	7.51%
Unincorporated Los Angeles County	1,167,903,319	18.45	\$144,695,183,022	0.81%
Total District	\$6,328,539,305	100.00%		
<u>Summary by County:</u>				
Los Angeles County	\$3,931,120,733	62.12%	\$2,101,924,313,796	0.19%
Orange County	2,397,418,572	37.88	\$810,710,682,210	0.30%
Total District	\$6,328,539,305	100.00%		

Source: California Municipal Statistics, Inc.

Assessed Valuation by Land Use. The following table sets forth a distribution of taxable property located in the District on the fiscal year 2024-25 tax roll by principal purpose for which the land is used, and the assessed valuation and number of parcels for each use.

LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
Fiscal Year 2024-25 Assessed Valuation and Parcels by Land Use

	2024-25 Assessed Valuation ⁽¹⁾	% of Total	No. of Parcels	% of Total
Non-Residential:				
Commercial/Office	\$459,127,170	7.33%	206	2.01%
Industrial Oil & Gas	60,948,225	0.97	16	0.16
Recreational	11,848,552	0.19	5	0.05
Government/Social/Institutional	19,823,769	0.32	90	0.88
Miscellaneous	12,839,759	0.21	35	0.34
Subtotal Non-Residential	\$564,587,475	9.02%	352	3.43%
Residential:				
Single Family Residence	\$4,897,360,061	78.24%	8,801	85.80%
Condominium	176,348,730	2.82	298	2.91
Mobile Home	5,278,231	0.08	266	2.59
Mobile Home Park	4,669,314	0.07	1	0.01
2+ Residential Units/Apartments	532,780,682	8.51	180	1.75
Subtotal Residential	\$5,616,437,018	89.72%	9,546	93.06%
Vacant Parcels	\$78,647,753	1.26%	360	3.51%
TOTAL	\$6,259,672,246	100.00%	10,258	100.00%

⁽¹⁾ Local secured assessed valuation, excluding tax-exempt property.
Source: California Municipal Statistics, Inc.

Assessed Valuation of Single-Family Homes. The following table sets forth the assessed valuation of single-family homes in the District's boundaries for fiscal year 2024-25, including the average and median per parcel assessed value.

LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
Fiscal Year 2024-25 Per Parcel Assessed Valuation of Single-Family Homes

	Number of Parcels	2024-25 Assessed Valuation	Average Assessed Valuation	Median Assessed Valuation
Single-Family Residential	8,801	\$4,897,360,061	\$556,455	\$507,052

2024-25 Assessed Valuation	No. of Parcels ⁽¹⁾	% of Total	Cumulative % of Total	Total Valuation	% of Total	Cumulative % of Total
\$0 - \$49,999	10	0.114%	0.114%	\$ 238,076	0.005%	0.005%
\$50,000 - \$99,999	611	6.942	7.056	51,221,635	1.046	1.051
\$100,000 - \$149,999	441	5.011	12.067	53,439,622	1.091	2.142
\$150,000 - \$199,999	254	2.886	14.953	44,324,106	0.905	3.047
\$200,000 - \$249,999	301	3.420	18.373	68,219,026	1.393	4.440
\$250,000 - \$299,999	591	6.715	25.088	162,876,339	3.326	7.766
\$300,000 - \$349,999	613	6.965	32.053	198,803,376	4.059	11.825
\$350,000 - \$399,999	540	6.136	38.189	202,500,653	4.135	15.960
\$400,000 - \$449,999	497	5.647	43.836	211,082,899	4.310	20.270
\$450,000 - \$499,999	464	5.272	49.108	219,849,484	4.489	24.759
\$500,000 - \$549,999	474	5.386	54.494	248,984,861	5.084	29.843
\$550,000 - \$599,999	530	6.022	60.516	304,807,136	6.224	36.067
\$600,000 - \$649,999	528	5.999	66.515	330,556,888	6.750	42.817
\$650,000 - \$699,999	494	5.613	72.128	333,518,887	6.810	49.627
\$700,000 - \$749,999	451	5.124	77.253	326,556,714	6.668	56.295
\$750,000 - \$799,999	371	4.215	81.468	287,130,055	5.863	62.158
\$800,000 - \$849,999	320	3.636	85.104	263,891,116	5.388	67.547
\$850,000 - \$899,999	241	2.738	87.842	210,466,386	4.298	71.844
\$900,000 - \$949,999	195	2.216	90.058	179,817,607	3.672	75.516
\$950,000 - \$999,999	133	1.511	91.569	129,670,362	2.648	78.164
\$1,000,000 and greater	742	8.431	100.000	1,069,404,833	21.836	100.000
Total	8,801	100.000%		\$4,897,360,061	100.000%	

⁽¹⁾ Improved single-family residential parcels. Excludes condominiums and parcels with multiple family units.
Source: California Municipal Statistics, Inc.

Largest Secured Taxpayers in District. The following table sets forth the 20 taxpayers with the greatest combined ownership of secured taxable property in the District on the fiscal year 2024-25 tax roll, and the secured assessed valuation of all property owned by those taxpayers in all taxing jurisdictions within the District.

LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
Largest Fiscal Year 2024-25 Local Secured Taxpayers

	Property Owner	Primary Land Use	2024-25 Assessed Valuation	Percent of Total ⁽¹⁾
1.	IMP Valentina LP	Apartments	\$188,781,673	3.02%
2.	La Habra Association LLC	Commercial	51,481,786	0.82
3.	RMX Resources LLC	Oil & Gas	41,467,648	0.66
4.	Monterra Springs Apartments LLC	Apartments	34,248,663	0.55
5.	Federal Avenue Partners LLC	Commercial	32,809,384	0.52
6.	Adrienne Sirott	Apartments	32,166,388	0.51
7.	Essex Hillsborough Park LP	Apartments	31,654,937	0.51
8.	Costco Wholesale Corporation	Commercial	30,554,721	0.49
9.	Los Altos XIX & XXV LP	Commercial	22,901,859	0.37
10.	The Springs Apartment Company LP	Apartments	16,844,791	0.27
11.	Devon Atkinson	Commercial	16,334,280	0.26
12.	CDB Investments LP	Commercial	14,613,458	0.23
13.	Tuscan Villas Apartment Company LP	Apartments	14,349,169	0.23
14.	La Habra Westridge Partners LP	Commercial	13,952,177	0.22
15.	Puente Hills Landfill Native Habitat Preservation	Undeveloped	13,757,383	0.22
16.	ABS CA-O LLC	Commercial	13,613,510	0.22
17.	JA&A LLC	Apartments	13,046,557	0.21
18.	Taylor Morrison Homes	Residential Properties	13,037,210	0.21
19.	Trico-TCH II Ltd.	Industrial	12,856,435	0.21
20.	Group VIII Covina Properties LP	Apartments	11,315,707	0.18
			<u>\$619,787,736</u>	<u>9.90%</u>

⁽¹⁾ The fiscal year 2024-25 local secured assessed valuation is \$6,259,672,246.
Source: California Municipal Statistics, Inc.

The more property (by assessed value) owned by a single taxpayer, the more tax collections are exposed to weakness, if any, in such taxpayer's financial situation and ability or willingness to pay property taxes in a timely manner. As shown above, the largest secured property taxpayer in the District owns approximately 3.02% of the fiscal year 2024-25 assessed value of taxable property within the District. Furthermore, assessments may be appealed by taxpayers seeking a reduction as a result of economic and other factors beyond the District's control. See "*Appeals of Assessed Valuation; Blanket Reductions of Assessed Values*" above.

Tax Rates

General. The California Constitution permits the levy of an *ad valorem* property tax on taxable property not to exceed 1% of the full cash value of the property, and State law requires the full 1% tax to be levied. The levy of special *ad valorem* property taxes in excess of the 1% levy is permitted as necessary to provide for debt service payments on school bonds and other voter-approved indebtedness.

The rate of tax necessary to pay fixed debt service on the Series 2025 Bonds in a given year depends on the assessed value of taxable property in that year. (The rate of tax imposed on unsecured property for repayment of the Series 2025 Bonds is based on the prior year's secured property tax rate.) Economic and other factors beyond the District's control, such as a general market decline in property values,

reclassification of property to a class exempt from taxation, whether by ownership or use (such as exemptions for property owned by State and local agencies and property used for qualified educational, hospital, charitable or religious purposes), the lack of availability or unaffordability of property or homeowners' insurance, pandemic, or the complete or partial destruction of taxable property caused by natural or manmade disaster, such as earthquake, flood, drought, fire, toxic dumping, etc., could cause a reduction in the assessed value of taxable property within the District and necessitate a corresponding increase in the annual tax rate to be levied to pay the principal of and interest on the Series 2025 Bonds. Issuance of additional authorized bonds in the future could also cause the tax rate to increase.

Typical Tax Rate Area. The following table sets forth *ad valorem* property tax rates for the last five fiscal years in typical tax rate areas of the District (TRA 6-008 and 6054). The assessed valuation for TRA 6-008 (Orange County) is \$1,924,017,012, which is 30.40% of the district's total assessed valuation for fiscal year 2024-25. The assessed valuation for TRA 6054 (Los Angeles County) is \$1,569,116,183, which is 24.79% of the district's total assessed valuation.

LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
Typical Total Tax Rates as Percentage of Assessed Valuation
Fiscal Years 2020-21 through 2024-25

	2020-21	2021-22	2022-23	2023-24	2024-25
General Tax Rate	1.000000%	1.000000%	1.000000%	1.000000%	1.000000%
Lowell Joint School District	0.026338	0.022420	0.024060	0.024160	0.024090
Fullerton High School District	0.028560	0.025990	0.025890	0.024420	0.024510
North Orange Community College	0.031980	0.028770	0.027780	0.017150	0.017350
Metropolitan Water District	0.003500	0.003500	0.003500	0.003500	0.007000
Total Tax Rate	1.090378%	1.080680%	1.081230%	1.069230%	1.072950%

Source: California Municipal Statistics, Inc.

In accordance with the California Constitution and the California Education Code, bonds approved pursuant to the 2024 Authorization may not be issued unless the District projects that repayment of all outstanding bonds approved under the 2024 Authorization will require a tax rate no greater than \$30.00 per \$100,000.00 of assessed value. Based on the assessed value of taxable property in the District at the time of issuance of the Series 2025 Bonds and all other outstanding bonds issued under the 2024 Authorization, the District projects that the maximum tax rate required to repay the Series 2025 Bonds, will be within such legal limit. The tax rate limitation applies only when new bonds are issued and does not restrict the authority of the Board of Supervisors of Orange County or the Board of Supervisors of Los Angeles County to levy taxes at such rate as may be necessary to pay debt service on the Series 2025 Bonds, and any other series of bonds issued under the 2024 Authorization in each year.

Tax Charges and Delinquencies

General. A school district's share of the 1% countywide tax is based on the actual allocation of property tax revenues to each taxing jurisdiction in the county in fiscal year 1978-79, as adjusted according to a complicated statutory process enacted since that time. Revenues derived from special *ad valorem* property taxes for voter-approved indebtedness, including the Series 2025 Bonds, are reserved to the taxing jurisdiction that approved and issued the debt, and may only be used to repay that debt.

The county treasurer-tax collector prepares the property tax bills. Property taxes on the regular secured assessment roll are due in two equal installments: the first installment is due on November 1, and becomes delinquent after December 10. The second installment is due on February 1 and becomes

delinquent after April 10. If taxes are not paid by the delinquent date, a 10% penalty attaches and any additional cost amount determined by the applicable county treasurer-tax collector is added to unpaid second installments. If taxes remain unpaid by June 30, the tax is deemed to be in default, and a \$15 state redemption fee applies. Interest then begins to accrue at the rate of 1.5% per month. The property owner has the right to redeem the property by paying the taxes, accrued penalties, and costs within five years of the date the property went into default. If the property is not redeemed within five years, it is subject to sale at a public auction by the applicable county treasurer-tax collector. The date on which taxes on supplemental assessments are due depends on when the supplemental tax bill is mailed.

Property taxes on the unsecured roll are due in one payment on the lien date, January 1, and become delinquent after August 31. A 10% penalty and an additional fee determined by the applicable county treasurer-tax collector attaches to delinquent taxes on property on the unsecured roll, plus any additional cost amount determined by the applicable county treasurer-tax collector, and an additional penalty of 1.5% per month begins to accrue on November 1. To collect unpaid taxes, the applicable county treasurer-tax collector may obtain a judgment lien upon and cause the sale of all property owned by the taxpayer in the county, and may seize and sell personal property, improvements and possessory interests of the taxpayer. The applicable county treasurer-tax collector may also bring a civil suit against the taxpayer for payment.

Property tax delinquencies may be impacted by economic and other factors beyond the District's control, including the ability or willingness of property owners to pay property taxes during an economic recession or depression. An economic recession or depression could be caused by many factors outside the control of the District, including high interest rates, reduced consumer confidence, reduced real wages or reduced economic activity as a result of a pandemic or a natural or manmade disaster, such as earthquake, drought, flood, fire or toxic dumping or the lack of availability or unaffordability of property or homeowners' insurance. Orange County (but not Los Angeles County) has adopted the Teeter Plan (defined herein), according to which Orange County distributes to the District the amount levied on the secured and supplemental tax rolls, instead of the amount actually collected. For more information, see "– Teeter Plan" and "– *Secured Tax Charges and Delinquencies Within the District*" below. It is not possible for the District to make any representation regarding the extent to which an economic recession or depression could impact the ability or willingness of property owners within the District to pay property taxes in the future. If delinquencies increase substantially as a result of events outside the control of the District, the Counties have the authority to increase allowances for annual reserves in the tax levy to avoid fluctuating tax levies.

Secured Tax Charges and Delinquencies within the District. The table on the following page sets forth the real property tax charges and corresponding delinquencies for the 1% general fund apportionment with respect to property located in Orange County and Los Angeles County for fiscal years 2019-20 through 2023-24. The portion of each County's 1% general fund levy that is allocated to the District is not pledged to and does not secure the repayment of school district bonds. See "– Teeter Plan" below.

LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
Secured Tax Charges and Delinquencies
Fiscal Years 2019-20 through 2023-24

Orange County Portion

Fiscal Year	Secured Tax Charge ⁽¹⁾	Amount Delinquent June 30	% Delinquent June 30
2019-20	\$6,264,429.16	\$52,425.39	0.84%
2020-21	6,638,733.08	44,730.33	0.67
2021-22	6,828,719.47	48,293.34	0.71
2022-23	7,592,707.99	57,603.96	0.76
2023-24	7,997,576.51	61,652.59	0.77

Los Angeles County Portion

Fiscal Year	Secured Tax Charge ⁽¹⁾	Amount Delinquent June 30	% Delinquent June 30
2019-20	\$2,173,038.06	\$48,925.86	2.25%
2020-21	2,259,968.29	38,441.20	1.70
2021-22	2,348,280.13	36,691.57	1.56
2022-23	2,500,229.38	38,968.26	1.56
2023-24	2,635,437.49	46,189.51	1.75

⁽¹⁾ 1% General Fund apportionment. Excludes supplemental property and redevelopment agency impounds.

Source: California Municipal Statistics, Inc.

Teeter Plan

Certain counties in the State operate under a statutory program entitled Alternate Method of Distribution of Tax Levies and Collections and of Tax Sale Proceeds (the "Teeter Plan"). Under the Teeter Plan local taxing entities receive 100% of their tax levies net of delinquencies, but do not receive interest or penalties on delinquent taxes collected by the applicable county. The Board of Supervisors of Orange County has adopted the Teeter Plan, and under the Teeter Plan, each participating local agency levying property taxes in Orange County, including school districts, receives the full amount of uncollected taxes levied on the secured tax roll credited to its fund, in the same manner as if the full amount due from taxpayers had been collected. In return, Orange County receives and retains delinquent payments, penalties and interest as collected that would have been due the local agency. Orange County applies the Teeter Plan to general taxes on the secured tax roll and taxes levied for repayment of school district general obligation bonds on the secured tax roll. There can be no assurances that Orange County will have sufficient funds available to distribute the full amount of the District's share of property tax collections to the District. However, State law requires Orange County to levy *ad valorem* property taxes sufficient to pay the Series 2025 Bonds when due.

The Teeter Plan is to remain in effect unless the Orange Board of Supervisors orders its discontinuance or unless, prior to the commencement of any fiscal year of Orange County (which commences on July 1), the Board of Supervisors receives a petition for its discontinuance from two-thirds of the participating revenue districts in Orange County. The Orange County Board of Supervisors may also, after holding a public hearing on the matter, discontinue the Teeter Plan with respect to any tax levying agency or assessment levying agency in Orange County if the rate of secured tax delinquency in that agency in any year exceeds 3% of the total of all taxes and assessments levied on the secured roll in that agency.

The District is not aware of any plans by the Board of Supervisors or Orange County to discontinue the Teeter Plan.

[Los Angeles County has not adopted the Teeter Plan, and consequently the Teeter Plan is not available to local taxing entities within Los Angeles County. The District's receipt of Los Angeles County property taxes is therefore subject to delinquencies. [However, the District is a member of the California Statewide Delinquent Tax Finance Authority ("CSDTFA"). CSDTFA is a joint exercise of powers agency formed for the purpose of purchasing delinquent *ad valorem* property taxes of its members in accordance with Section 6516.6 of the Government Code of the State of California. Historically, CSDTFA has from time to time purchased delinquent *ad valorem* property tax receivables related to the District's share of the 1% general *ad valorem* property tax levy in Los Angeles County (not the additional *ad valorem* property tax levy for debt service on the District's general obligation bonds) from the District. However, the District cannot predict whether CSDTFA will continue to make such purchases in the future. CSDTFA purchased the District's delinquent *ad valorem* property tax receivables related to the 1% general *ad valorem* property tax levy in Los Angeles County attributable to fiscal year 2023-24 from the District at a purchase price equal to []% of such receivables. Any penalty charges collected with respect to such delinquencies in Los Angeles County will be retained by CSDTFA. CSDTFA does not currently purchase *ad valorem* property tax receivables in Los Angeles County related to the payment of general obligation bonds of the District.] ***[District to confirm and provide purchase price.]***

Direct and Overlapping Debt

Set forth on the following page is a schedule of direct and overlapping debt prepared by California Municipal Statistics, Inc. effective July 2, 2025 for debt outstanding as of July 1, 2025. The table is included for general information purposes only. The District has not reviewed this table for completeness or accuracy and makes no representations in connection therewith. The first column in the table names each public agency which has outstanding debt as of the date of the schedule and whose territory overlaps the District in whole or in part. Column two sets forth the percentage of each overlapping agency's assessed value located within the boundaries of the District. This percentage, multiplied by the total outstanding debt of each overlapping agency (which is not set forth in the table) produces the amount set forth in column three, which is the apportionment of each overlapping agency's outstanding debt to taxable property in the District.

The schedule generally includes long-term obligations sold in the public credit markets by public agencies whose boundaries overlap the boundaries of the District. Such long-term obligations generally are not payable from revenues of the District (except as indicated) nor are they necessarily obligations secured by land within the District. In many cases, long-term obligations issued by a public agency are payable only from the general fund or other revenues of such public agency.

LOWELL JOINT SCHOOL DISTRICT
(Orange and Los Angeles Counties, California)
Statement of Direct and Overlapping Bonded Debt

July 2, 2025

2024-25 Assessed Valuation:	\$4,893,971,768	<u>% Applicable</u>	<u>Debt 7/1/25</u>
<u>DIRECT AND OVERLAPPING TAX AND ASSESSMENT DEBT:</u>			
Metropolitan Water District		7.427%	\$4,933,738
North Orange County Joint Community College District		3.502	9,635,216
Fullerton Joint Union High School District		12.890	37,655,557
Lowell Joint School District		100.000	44,950,000 ⁽¹⁾
TOTAL DIRECT AND OVERLAPPING TAX AND ASSESSMENT DEBT			<u>\$92,267,363</u>
<u>OVERLAPPING GENERAL FUND DEBT:</u>			
Orange County General Fund Obligations		0.296%	\$ 1,270,032
Orange County Board of Education Certificates of Participation		0.296	26,995
Los Angeles County General Fund Obligations		0.187	5,678,512
Los Angeles County Superintendent of Schools Certificates of Participation		0.187	4,360
North Orange County Regional Occupation Program Certificates of Participation		1.365	93,912
Fullerton Joint Union High School District Certificates of Participation		12.890	4,755,766
City of La Habra General Fund Obligation and Pension Obligation Bonds		25.968	19,060,512
City of La Mirada General Fund Obligations		0.085	3,239
City of Whittier Pension Obligation Bonds		7.515	8,487,065
TOTAL OVERLAPPING GENERAL FUND DEBT			<u>\$39,380,393</u>
<u>OVERLAPPING TAX INCREMENT DEBT (Successor Agencies):</u>			\$1,376,945
COMBINED TOTAL DEBT			\$133,024,701 ⁽²⁾

Ratios to 2024-25 Assessed Valuation:

Direct Debt (\$44,950,000)	0.71%
Total Direct and Overlapping Tax and Assessment Debt	1.46%
Combined Total Debt.....	2.10%

Ratios to Redevelopment Successor Agency Incremental Valuation (\$298,103,106):

Total Overlapping Tax Increment Debt	0.46%

⁽¹⁾ Excludes the Series 2025 Bonds.

⁽²⁾ Excludes tax and revenue anticipation notes, enterprise revenue, mortgage revenue and non-bonded capital lease obligations.

Source: California Municipal Statistics, Inc.

TAX MATTERS

[In the opinion of Orrick, Herrington & Sutcliffe LLP, bond counsel to the District ("Bond Counsel"), based upon an analysis of existing laws, regulations, rulings and court decisions, and assuming, among other matters, the accuracy of certain representations and compliance with certain covenants, interest on the Series 2025 Bonds is excluded from gross income for federal income tax purposes under Section 103 of the Internal Revenue Code of 1986 (the "Code") and is exempt from State of California personal income taxes. Bond Counsel is of the further opinion that interest on the Series 2025 Bonds is not a specific preference item for purposes of the federal individual alternative minimum tax. Bond Counsel observes that interest on the Series 2025 Bonds included in adjusted financial statement income of certain corporations is not excluded from the federal corporate alternative minimum tax. Bond Counsel expresses no opinion regarding any other tax consequences related to the ownership or disposition of, or the amount, accrual or

receipt of interest on, the Series 2025 Bonds. A complete copy of the proposed form of opinion of Bond Counsel is set forth in Appendix C.

To the extent the issue price of any maturity of the Series 2025 Bonds is less than the amount to be paid at maturity of such Series 2025 Bonds (excluding amounts stated to be interest and payable at least annually over the term of such Series 2025 Bonds), the difference constitutes “original issue discount,” the accrual of which, to the extent properly allocable to each Beneficial Owner thereof, is treated as interest on the Series 2025 Bonds which is excluded from gross income for federal income tax purposes and exempt from State of California personal income taxes. For this purpose, the issue price of a particular maturity of the Series 2025 Bonds is the first price at which a substantial amount of such maturity of the Series 2025 Bonds is sold to the public (excluding bond houses, brokers, or similar persons or organizations acting in the capacity of underwriters, placement agents or wholesalers). The original issue discount with respect to any maturity of the Series 2025 Bonds accrues daily over the term to maturity of such Series 2025 Bonds on the basis of a constant interest rate compounded semiannually (with straight-line interpolations between compounding dates). The accruing original issue discount is added to the adjusted basis of such Series 2025 Bonds to determine taxable gain or loss upon disposition (including sale, redemption, or payment on maturity) of such Series 2025 Bonds. Beneficial Owners of the Series 2025 Bonds should consult their own tax advisors with respect to the tax consequences of ownership of Series 2025 Bonds with original issue discount, including the treatment of Beneficial Owners who do not purchase such Series 2025 Bonds in the original offering to the public at the first price at which a substantial amount of such Series 2025 Bonds is sold to the public.

Series 2025 Bonds purchased, whether at original issuance or otherwise, for an amount higher than their principal amount payable at maturity (or, in some cases, at their earlier call date) (“Premium Bonds”) will be treated as having amortizable bond premium. No deduction is allowable for the amortizable bond premium in the case of obligations, like the Premium Bonds, the interest on which is excluded from gross income for federal income tax purposes. However, the amount of tax-exempt interest received, and a Beneficial Owner’s basis in a Premium Bond, will be reduced by the amount of amortizable bond premium properly allocable to such Beneficial Owner. Beneficial Owners of Premium Bonds should consult their own tax advisors with respect to the proper treatment of amortizable bond premium in their particular circumstances.

The Code imposes various restrictions, conditions and requirements relating to the exclusion from gross income for federal income tax purposes of interest on obligations such as the Series 2025 Bonds. The District has made certain representations and covenanted to comply with certain restrictions, conditions and requirements designed to ensure that interest on the Series 2025 Bonds will not be included in federal gross income. Inaccuracy of these representations or failure to comply with these covenants may result in interest on the Series 2025 Bonds being included in gross income for federal income tax purposes, possibly from the date of original issuance of the Series 2025 Bonds. The opinion of Bond Counsel assumes the accuracy of these representations and compliance with these covenants. Bond Counsel has not undertaken to determine (or to inform any person) whether any actions taken (or not taken), or events occurring (or not occurring), or any other matters coming to Bond Counsel’s attention after the date of issuance of the Series 2025 Bonds may adversely affect the value of, or the tax status of interest on, the Series 2025 Bonds. Accordingly, the opinion of Bond Counsel is not intended to, and may not, be relied upon in connection with any such actions, events or matters.

Although Bond Counsel is of the opinion that interest on the Series 2025 Bonds is excluded from gross income for federal income tax purposes and is exempt from State of California personal income taxes, the ownership or disposition of, or the accrual or receipt of amounts treated as interest on, the Series 2025 Bonds may otherwise affect a Beneficial Owner’s federal, state or local tax liability. The nature and extent of these other tax consequences depends upon the particular tax status of the Beneficial Owner or the

Beneficial Owner's other items of income or deduction. Bond Counsel expresses no opinion regarding any such other tax consequences.

Current and future legislative proposals, if enacted into law, clarification of the Code or court decisions may cause interest on the Series 2025 Bonds to be subject, directly or indirectly, in whole or in part, to federal income taxation or to be subject to or exempted from state income taxation, or otherwise prevent Beneficial Owners from realizing the full current benefit of the tax status of such interest. The introduction or enactment of any such legislative proposals or clarification of the Code or court decisions may also affect, perhaps significantly, the market price for, or marketability of, the Series 2025 Bonds. Prospective purchasers of the Series 2025 Bonds should consult their own tax advisors regarding the potential impact of any pending or proposed federal or state tax legislation, regulations or litigation, as to which Bond Counsel expresses no opinion.

The opinion of Bond Counsel is based on current legal authority, covers certain matters not directly addressed by such authorities, and represents Bond Counsel's judgment as to the proper treatment of the Series 2025 Bonds for federal income tax purposes. It is not binding on the Internal Revenue Service ("IRS") or the courts. Furthermore, Bond Counsel cannot give and has not given any opinion or assurance about the future activities of the District or about the effect of future changes in the Code, the applicable regulations, the interpretation thereof or the enforcement thereof by the IRS. The District has covenanted, however, to comply with the requirements of the Code.

Bond Counsel's engagement with respect to the Series 2025 Bonds ends with the issuance of the Series 2025 Bonds, and, unless separately engaged, Bond Counsel is not obligated to defend the District or the Beneficial Owners regarding the tax-exempt status of the Series 2025 Bonds in the event of an audit examination by the IRS. Under current procedures, Beneficial Owners would have little, if any, right to participate in the audit examination process. Moreover, because achieving judicial review in connection with an audit examination of tax-exempt bonds is difficult, obtaining an independent review of IRS positions with which the District legitimately disagrees, may not be practicable. Any action of the IRS, including but not limited to selection of the Series 2025 Bonds for audit, or the course or result of such audit, or an audit of bonds presenting similar tax issues may affect the market price for, or the marketability of, the Series 2025 Bonds, and may cause the District or the Beneficial Owners to incur significant expense.

Payments on the Series 2025 Bonds generally will be subject to U.S. information reporting and possibly to "backup withholding." Under Section 3406 of the Code and applicable U.S. Treasury Regulations issued thereunder, a non-corporate Beneficial Owner of Series 2025 Bonds may be subject to backup withholding with respect to "reportable payments," which include interest paid on the Series 2025 Bonds and the gross proceeds of a sale, exchange, redemption, retirement or other disposition of the Series 2025 Bonds. The payor will be required to deduct and withhold the prescribed amounts if (i) the payee fails to furnish a U.S. taxpayer identification number ("TIN") to the payor in the manner required, (ii) the IRS notifies the payor that the TIN furnished by the payee is incorrect, (iii) there has been a "notified payee underreporting" described in Section 3406(c) of the Code or (iv) the payee fails to certify under penalty of perjury that the payee is not subject to withholding under Section 3406(a)(1)(C) of the Code. Amounts withheld under the backup withholding rules may be refunded or credited against a Beneficial Owner's federal income tax liability, if any, provided that the required information is timely furnished to the IRS. Certain Beneficial Owners (including among others, corporations and certain tax-exempt organizations) are not subject to backup withholding. The failure to comply with the backup withholding rules may result in the imposition of penalties by the IRS.]

OTHER LEGAL MATTERS

Legal Opinion

The validity of the Series 2025 Bonds and certain other legal matters are subject to the approving opinion of Orrick, Herrington & Sutcliffe LLP, Bond Counsel to the District. Bond Counsel expects to deliver an opinion with respect to the Series 2025 Bonds at the time of issuance substantially in the form set forth in Appendix C. Bond Counsel, as such, undertakes no responsibility for the accuracy, completeness or fairness of this Official Statement. Certain legal matters will be passed upon for the District by Orrick, Herrington & Sutcliffe LLP, as Disclosure Counsel to the District.

Legality for Investment in California

Under the provisions of the California Financial Code, the Series 2025 Bonds are legal investments for commercial banks in the State to the extent that the Series 2025 Bonds, in the informed opinion of the bank, are prudent for the investment of funds of depositors, and, under provisions of the California Government Code, the Series 2025 Bonds are eligible securities for deposit of public monies in the State.

Continuing Disclosure

The District will covenant under the Continuing Disclosure Certificate to provide, or to cause to be provided, to the Municipal Securities Rulemaking Board through its Electronic Municipal Market Access system or such other electronic system designated by the Municipal Securities Rulemaking Board (the “EMMA System”) certain annual financial information and operating data relating to the District (the “Annual Report”) by not later than nine months following the end of the District’s fiscal year (currently ending June 30), commencing with the report for fiscal year 2024-25 (such initial Annual Report due no later than April 1, 2026) and notice of the occurrence of certain enumerated events (“Notice Events”) in a timely manner not in excess of ten business days after the occurrence of such a Notice Event. The specific nature of the information to be contained in the Annual Report and the notices of Notice Events is set forth in APPENDIX D – “FORM OF CONTINUING DISCLOSURE CERTIFICATE.” These covenants have been made for the benefit of the holders and Beneficial Owners of the Series 2025 Bonds in order to assist the Initial Purchaser in complying with Rule 15c2-12(b)(5) of the Securities and Exchange Commission (the “Rule”).

[Compliance report updates.]

Fieldman, Rolapp & Associates, Inc. doing business as Applied Best Practices currently serves as the District’s dissemination agent in connection with each of the District’s prior continuing disclosure undertakings pursuant to the Rule and will serve as dissemination agent in connection with the continuing disclosure undertaking pursuant to the Rule relating to the Series 2025 Bonds.

Litigation

No litigation is pending or threatened concerning or contesting the validity of the Series 2025 Bonds or the District’s ability to receive *ad valorem* property taxes and to collect other revenues, or contesting the District’s ability to issue and retire the Series 2025 Bonds. The District is not aware of any litigation pending or threatened questioning the political existence of the District or contesting the title to their offices of District officers who will execute the Series 2025 Bonds or District officials who will sign certifications relating to the Series 2025 Bonds, or the powers of those offices. A certificate (or certificates) to that effect will be furnished to the Initial Purchaser at the time of the original delivery of the Series 2025 Bonds.

[The District is occasionally subject to lawsuits and claims. In the opinion of the District, the aggregate amount of the uninsured liabilities of the District under these lawsuits and claims will not materially affect the financial position or operations of the District.][*District to confirm.*]

FINANCIAL STATEMENTS

The District's audited financial statements for fiscal year ended June 30, 2024, are included in Appendix B. Such financial statements have been audited by Nigro & Nigro, A Professional Accountancy Corporation, Murrieta, California ("Nigro & Nigro"). The District has not requested nor has the District obtained the consent of Nigro & Nigro to the inclusion of its report in Appendix B. Nigro & Nigro has not been engaged to perform and has not performed, since the date of its report included herein, any procedures on the financial statements addressed in that report. Nigro & Nigro has not been requested to perform and has not performed any procedures relating to the Official Statement.

MISCELLANEOUS

Rating

[Moody's Investors Service, Inc.] has assigned its rating of "[]" to the Series 2025 Bonds. A rating agency generally bases its rating on its own investigations, studies and assumptions as well as information and materials furnished to it (which may include information and materials from the District, which are not included in this Official Statement). The rating reflects only the view of the rating agency furnishing the same, and any explanation of the significance of the rating should be obtained only from the rating agency providing the same. Such rating is not a recommendation to buy, sell or hold the Series 2025 Bonds. There is no assurance that any rating will continue for any given period of time or that it will not be revised downward or withdrawn entirely by the rating agency providing the same, if, in the judgment of such rating agency, circumstances so warrant. Any such downward revision or withdrawal of the rating may have an adverse effect on the market price of the Series 2025 Bonds. Neither the Initial Purchaser nor the District has undertaken any responsibility after the offering of the Series 2025 Bonds to assure the maintenance of the rating or to oppose any such revision or withdrawal.

Professionals Involved in the Offering

Orrick, Herrington & Sutcliffe LLP is acting as Bond Counsel and Disclosure Counsel with respect to the Series 2025 Bonds, and will receive compensation from the District contingent upon the sale and delivery of the Series 2025 Bonds. Fieldman, Rolapp & Associates, Inc. is acting as the District's municipal advisor (the "Municipal Advisor") with respect to the Series 2025 Bonds. Payment of the fees and expenses of the District's Municipal Advisor is also contingent upon the sale and delivery of the Series 2025 Bonds.

Underwriting

The Series 2025 Bonds were purchased by _____, the initial purchaser (the "Initial Purchaser") of the Series 2025 Bonds, as the winner of a competitive bid conducted on _____, 2025. The Initial Purchaser has agreed to purchase the Series 2025 Bonds at a price of \$ _____. The Initial Purchaser's total discount is \$ _____. See "THE SERIES 2025 BONDS – Application and Investment of Series 2025 Bond Proceeds."

The Initial Purchaser may offer and sell the Series 2025 Bonds to certain securities dealers and dealer banks and banks acting as agent at prices lower than the public offering prices set forth on the inside front cover page of this Official Statement. The public offering prices may be changed from time to time by the Initial Purchaser.

ADDITIONAL INFORMATION

The purpose of this Official Statement is to supply information to purchasers of the Series 2025 Bonds. Quotations from and summaries and explanations of the Series 2025 Bonds and of the statutes and documents contained herein do not purport to be complete, and reference is made to such documents and statutes for full and complete statements of their provisions.

Any statements in this Official Statement involving matters of opinion, whether or not expressly so stated, are intended as such and not as representations of fact. This Official Statement is not to be construed as a contract or agreement between the District and the purchasers or Owners of any of the Series 2025 Bonds.

The District has duly authorized the delivery of this Official Statement.

LOWELL JOINT SCHOOL DISTRICT

By: _____
Superintendent

APPENDIX A
INFORMATION RELATING TO THE DISTRICT'S OPERATIONS AND BUDGET

APPENDIX B

**FINANCIAL STATEMENTS OF THE DISTRICT
FOR THE FISCAL YEAR ENDED JUNE 30, 2024**

APPENDIX C

PROPOSED FORM OF OPINION OF BOND COUNSEL

Upon the issuance and delivery of the Series 2025 Bonds, Orrick, Herrington & Sutcliffe LLP, Bond Counsel to the District, proposes to render its final approving opinion with respect to the Series 2025 Bonds in substantially the following form:

APPENDIX D

FORM OF CONTINUING DISCLOSURE CERTIFICATE

APPENDIX E

ORANGE COUNTY TREASURY POOL

Under California Government Code Section (“CGC”) 53601, effective January 1, 2025, the Board of Supervisors of the County of Orange (“Orange County”) became the named fiduciary subject to the prudent investor standard and retained the authority to invest or reinvest the funds of Orange County and the funds of the Educational Districts in the Orange County Treasury.

The primary goal of the Orange County Treasury Pool is to invest public funds in a manner which will provide the maximum security of principal invested with secondary emphasis on providing adequate liquidity to Pool Participants and lastly to achieve a market rate of return within the parameters of prudent risk management while conforming to all applicable statutes and resolutions governing the investment of public funds. The main investing objectives, in order of priority are: Safety, Liquidity and Yield.

The Orange County Auditor-Controller Internal Audit Division audits the Orange County Treasury on a quarterly and annual basis pursuant to CGC 26920 and 26922. In addition, an annual compliance audit is also conducted as required by CGC 27134. All investment audit reports and the monthly Treasurer’s Investment Report are available on line at octreasurer.gov/publicfunds. (This reference is for convenience of reference only and not considered to be incorporated as part of this Official Statement).

The District’s funds held by the Orange County Treasury are invested in the Orange County Treasury Pool, which pools all of the public funds from the Orange County and the Educational Districts. Neither the District nor the Initial Purchaser has made an independent investigation of the investments in the Orange County Treasury Pool. The value of the various investments in the Orange County Treasury Pool will fluctuate on a daily basis as a result of a multitude of factors, including generally prevailing interest rates and other economic conditions. As of January, 31, 2025, Fitch Ratings, LLC has rated the pooled funds in the County Treasury at AA+ for credit risk and a volatility rating of S1.

[Insert Orange County treasury report here.]

APPENDIX F

ORANGE COUNTY CALIFORNIA 2025 INVESTMENT POLICY

APPENDIX G

BOOK-ENTRY ONLY SYSTEM

The information in this appendix has been provided by DTC for use in securities offering documents, and the District takes no responsibility for the accuracy or completeness thereof. The District cannot and does not give any assurances that DTC, DTC Participants or Indirect Participants will distribute the Beneficial Owners either (a) payments of interest, principal or premium, if any, with respect to the Series 2025 Bonds or (b) certificates representing ownership interest in or other confirmation of ownership interest in the Series 2025 Bonds, or that they will so do on a timely basis or that DTC, DTC Direct Participants or DTC Indirect Participants will act in the manner described in this Official Statement.

1. The Depository Trust Company (“DTC”) will act as securities depository for the Series 2025 Bonds (the “Securities”). The Securities will be issued as fully-registered securities registered in the name of Cede & Co. (DTC’s partnership nominee) or such other name as may be requested by an authorized representative of DTC. One fully-registered Security certificate will be issued for each maturity of the Securities, in the aggregate principal amount of such issue, and will be deposited with DTC. If, however, the aggregate principal amount of any issue exceeds \$500 million, one certificate will be issued with respect to each \$500 million of principal amount, and an additional certificate will be issued with respect to any remaining principal amount of such issue.

2. DTC, the world’s largest securities depository, is a limited-purpose trust company organized under the New York Banking Law, a “banking organization” within the meaning of the New York Banking Law, a member of the Federal Reserve System, a “clearing corporation” within the meaning of the New York Uniform Commercial Code, and a “clearing agency” registered pursuant to the provisions of Section 17A of the Securities Exchange Act of 1934. DTC holds and provides asset servicing for over 3.5 million issues of U.S. and non-U.S. equity issues, corporate and municipal debt issues, and money market instruments (from over 100 countries) that DTC’s participants (“Direct Participants”) deposit with DTC. DTC also facilitates the post-trade settlement among Direct Participants of sales and other securities transactions in deposited securities, through electronic computerized book-entry transfers and pledges between Direct Participants’ accounts. This eliminates the need for physical movement of securities certificates. Direct Participants include both U.S. and non-U.S. securities brokers and dealers, banks, trust companies, clearing corporations, and certain other organizations. DTC is a wholly-owned subsidiary of The Depository Trust & Clearing Corporation (“DTCC”). DTCC is the holding company for DTC, National Securities Clearing Corporation and Fixed Income Clearing Corporation, all of which are registered clearing agencies. DTCC is owned by the users of its regulated subsidiaries. Access to the DTC system is also available to others such as both U.S. and non-U.S. securities brokers and dealers, banks, trust companies, and clearing corporations that clear through or maintain a custodial relationship with a Direct Participant, either directly or indirectly (“Indirect Participants”). DTC has a Standard & Poor’s rating of AA+. The DTC Rules applicable to its Participants are on file with the Securities and Exchange Commission. More information about DTC can be found at www.dtcc.com, which is not incorporated herein by reference.

3. Purchases of Securities under the DTC system must be made by or through Direct Participants, which will receive a credit for the Securities on DTC’s records. The ownership interest of each actual purchaser of each Security (“Beneficial Owner”) is in turn to be recorded on the Direct and Indirect Participants’ records. Beneficial Owners will not receive written confirmation from DTC of their purchase. Beneficial Owners are, however, expected to receive written confirmations providing details of the transaction, as well as periodic statements of their holdings, from the Direct or Indirect Participant through which the Beneficial Owner entered into the transaction. Transfers of ownership interests in the Securities are to be accomplished by entries made on the books of Direct and Indirect Participants acting on behalf of

Beneficial Owners. Beneficial Owners will not receive certificates representing their ownership interests in Securities, except in the event that use of the book-entry system for the Securities is discontinued.

4. To facilitate subsequent transfers, all Securities deposited by Direct Participants with DTC are registered in the name of DTC's partnership nominee, Cede & Co., or such other name as may be requested by an authorized representative of DTC. The deposit of Securities with DTC and their registration in the name of Cede & Co. or such other DTC nominee do not effect any change in beneficial ownership. DTC has no knowledge of the actual Beneficial Owners of the Securities; DTC's records reflect only the identity of the Direct Participants to whose accounts such Securities are credited, which may or may not be the Beneficial Owners. The Direct and Indirect Participants will remain responsible for keeping account of their holdings on behalf of their customers.

5. Conveyance of notices and other communications by DTC to Direct Participants, by Direct Participants to Indirect Participants, and by Direct Participants and Indirect Participants to Beneficial Owners will be governed by arrangements among them, subject to any statutory or regulatory requirements as may be in effect from time to time. Beneficial Owners of Securities may wish to take certain steps to augment the transmission to them of notices of significant events with respect to the Securities, such as redemptions, tenders, defaults, and proposed amendments to the Security documents. For example, Beneficial Owners of Securities may wish to ascertain that the nominee holding the Securities for their benefit has agreed to obtain and transmit notices to Beneficial Owners. In the alternative, Beneficial Owners may wish to provide their names and addresses to the registrar and request that copies of notices be provided directly to them.

6. Redemption notices shall be sent to DTC. If less than all of the Securities within an issue are being redeemed, DTC's practice is to determine by lot the amount of the interest of each Direct Participant in such issue to be redeemed.

7. Neither DTC nor Cede & Co. (nor any other DTC nominee) will consent or vote with respect to the Securities unless authorized by a Direct Participant in accordance with DTC's MMI Procedures. Under its usual procedures, DTC mails an Omnibus Proxy to the District as soon as possible after the record date. The Omnibus Proxy assigns Cede & Co.'s consenting or voting rights to those Direct Participants to whose accounts the Securities are credited on the record date (identified in a listing attached to the Omnibus Proxy).

8. Redemption proceeds, distributions, and dividend payments on the Securities will be made to Cede & Co., or such other nominee as may be requested by an authorized representative of DTC. DTC's practice is to credit Direct Participants' accounts, upon DTC's receipt of funds and corresponding detail information from the District or the Paying Agent, on payable date in accordance with their respective holdings shown on DTC's records. Payments by Participants to Beneficial Owners will be governed by standing instructions and customary practices, as is the case with securities held for the accounts of customers in bearer form or registered in "street name," and will be the responsibility of such Participant and not of DTC, the Paying Agent or the District, subject to any statutory or regulatory requirements as may be in effect from time to time. Payment of redemption proceeds, distributions, and dividend payments to Cede & Co. (or such other nominee as may be requested by an authorized representative of DTC) is the responsibility of the District or the Paying Agent, disbursement of such payments to Direct Participants will be the responsibility of DTC, and disbursement of such payments to the Beneficial Owners will be the responsibility of Direct and Indirect Participants.

9. DTC may discontinue providing its services as depository with respect to the Securities at any time by giving reasonable notice to the District or the Paying Agent. Under such circumstances, in the

event that a successor depository is not obtained, Security certificates are required to be printed and delivered.

10. The District may decide to discontinue use of the system of book-entry-only transfers through DTC (or a successor securities depository). In that event, Security certificates will be printed and delivered to DTC.

11. The information in this appendix concerning DTC and DTC's book-entry system has been obtained from sources that the District believes to be reliable, but the District takes no responsibility for the accuracy thereof.

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Resolution 2025-26 No. 982 of the Board of Trustees
of the Lowell Joint School District Resolution
Requesting The Board of Supervisors of the County of
Orange to Establish Tax Rate for Bonds of the Lowell
Joint School District Expected to be Sold During
Fiscal Year 2025-26, and Authorizing Necessary
Actions in Connection Therewith

ACTION/
(RESOLUTION)

Summary Statement:

On November 5, 2024, the voters of the District approved a measure authorizing the District to issue up to \$54,000,000 in aggregate principal amount of bonds for authorized projects.

The Board of Supervisors of the County is required to take action approving a tax rate for payment of indebtedness of the District during Fiscal Year 2025-26, and it is the responsibility of the Auditor-Controller of the County to calculate the several tax rates for the Board of Supervisors'.

Since it is not possible or advisable to sell the District's bonds in time to permit the Auditor-Controller, or other appropriate County official, of the County to calculate the tax rates necessary to pay debt service on such bonds in order that such tax rates may be reflected on 2025-26 property tax bills of taxpayers in the District.

Education Code of the State of California provides that the Board of Supervisors of each county shall annually, at the time of making the levy of taxes for county purposes, estimate the amount of money required to meet the payment of the principal and interest on the bonds authorized by the electors of the District and not sold, and which the Board of Trustees of the District informs the Board of Supervisors in their belief will be sold before the next tax levy, and further provides that said Board of Supervisors shall levy a tax sufficient to pay the estimated principal and interest.

Superintendent's Comment:

ADOPTION BY MAJORITY ROLL CALL VOTE RECOMMENDED.

Financial Implications:

The Series 2025 Bonds will be paid from taxes on property within the District levied and collected by the Counties of Orange and Los Angeles. The Series 2025 Bonds will finance projects authorized by the voters at the November 5, 2024, election.

Recommendation:

It is recommended that the Board of Trustees approve the attached resolution and authorize District officers and staff to take the necessary steps to complete the financing.

Resolution. The resolution authorizes the issuance of the Series 2025 Bonds and establishes parameters for the terms thereof, approves the forms of and authorizes the execution and delivery of the financing documents (including the Official Notice of Sale, the Notice of Intention to Sell Bonds, the Certificate of Award and the Continuing Disclosure Certificate), approves the form of and authorizes the distribution of the Official Statement (in preliminary and final form), and sets forth the security provisions for the Series 2025 Bonds and the covenants of the District to bond owners.

2. **Official Notice of Sale.** The Official Notice of Sale invites bids for the public sale of the Series 2025 Bonds from bidders, and it describes the details of the bond sale, including the method of delivering bids and the date, time and place of the bid opening, the terms of the Series 2025 Bonds and the security therefor and any limitations on the interest rates or purchase price which may be bid for the Series 2025 Bonds.

3. **Notice of Intention to Sell Bonds.** The Notice of Intention to Sell Bonds is published prior to the sale date in accordance with State law and serves as a notice to potential bidders of the upcoming public sale of the Series 2025 Bonds.

4. **Certificate of Award.** The Certificate of Award is the document by which an authorized officer of the District awards the sale of the Series 2025 Bonds to the bidder with the lowest true interest cost bid.

5. **Continuing Disclosure Certificate.** Federal securities laws indirectly require school districts to disclose and annually update certain financial and operating information relevant to the security and repayment of the Series 2025 Bonds. The Continuing Disclosure Certificate contains the undertakings of the District to provide the ongoing disclosure in the form of annual reports and event notices.

6. **Official Statement.** The Official Statement (in its preliminary and final form) is used to provide information to investors and prospective investors about the District and the Series 2025 Bonds. The Series 2025 Bonds constitute securities for purposes of state and federal securities laws and, therefore, the offering and sale of the Series 2025 Bonds through the Official Statement is subject to certain provisions of such laws, including, importantly,

Superintendent's Comment:

ADOPTION BY MAJORITY ROLL CALL VOTE RECOMMENDED.

the anti-fraud laws. The Official Statement sets forth information about the terms of the Series 2025 Bonds, the security for the Series 2025 Bonds, the sources and uses of the proceeds of the Series 2025 Bonds, the District and the tax base of the District, the documents under which the Series 2025 Bonds are issued, and the tax-exemption of interest on the Series 2025 Bonds.

As an elementary school district, the District may issue bonds in an amount up to 1.25% of the assessed valuation of taxable property within its boundaries. The District's fiscal year 2024-25 gross bonding capacity (also commonly referred to as the "bonding limit" or "debt limit") is approximately \$79.1 million and its net bonding capacity is approximately \$34.3 million (taking into account current outstanding debt before the issuance of the Series 2025 Bonds). It is anticipated that the District's net bonding capacity will increase to the allow for the issuance of the proposed \$35,000,000 of Series 2025 Bonds when the fiscal year 2025-26 equalized assessment roll is effective. To the extent the net capacity is not sufficient to issue the full \$35,000,000, the principal amount of the Series 2025 Bonds will be reduced.

Budget Implications:

The Series 2025 Bonds will be paid from taxes on property within the District levied and collected by the Counties of Orange and Los Angeles. The Series 2025 Bonds will finance projects authorized by the voters at the November 5, 2024, election.

Recommendation:

It is recommended that the Board of Trustees approve the attached resolution and authorize District officers and staff to take the necessary steps to complete the financing.

DB/ds

Attachments

Superintendent's Comment:

ADOPTION BY MAJORITY ROLL CALL VOTE RECOMMENDED.

LOWELL JOINT SCHOOL DISTRICT

RESOLUTION 2025-2026 NO. 982

**RESOLUTION OF THE BOARD OF TRUSTEES OF THE
LOWELL JOINT SCHOOL DISTRICT
OF LOS ANGELES AND ORANGE COUNTIES, CALIFORNIA,
RESOLUTION REQUESTING THE BOARD OF SUPERVISORS OF THE COUNTY OF
ORANGE TO ESTABLISH TAX RATE FOR BONDS OF THE LOWELL JOINT
SCHOOL DISTRICT EXPECTED TO BE SOLD DURING FISCAL YEAR 2025-26, AND
AUTHORIZING NECESSARY ACTIONS IN CONNECTION THEREWITH.**

WHEREAS, this Board of Trustees (the “Board”) of the Lowell Joint School District (the “District”), located in Orange County (the “County”), California, is authorized to, and intends to, issue a 2025 series of its bonds for purposes authorized by the voters of the District on November 5, 2024;

and

WHEREAS, the Board of Supervisors of the County is required to take action approving a tax rate for payment of indebtedness of the District during Fiscal Year 2025-26, and it is the responsibility of the Auditor-Controller of the County to calculate the several tax rates for the Board of Supervisors’ action thereon; and

WHEREAS, this Board has determined that it is not possible or advisable to sell the District’s bonds in time to permit the Auditor-Controller, or other appropriate County official, of the County to calculate the tax rates necessary to pay debt service on such bonds in order that such tax rates may be reflected on 2025-26 property tax bills of taxpayers in the District; and

WHEREAS, the Education Code of the State of California provides that the Board of Supervisors of each county shall annually, at the time of making the levy of taxes for county purposes, estimate the amount of money required to meet the payment of the principal and interest on the bonds authorized by the electors of the District and not sold, and which the Board of Trustees of the District informs the Board of Supervisors in their belief will be sold before the next tax levy, and further provides that said Board of Supervisors shall levy a tax sufficient to pay the principal and interest so estimated; and

WHEREAS, this Board deems it necessary and desirable to issue a series of the District’s bonds during Fiscal Year 2025-26, as authorized by the Education Code, and that the County levy a tax for payment on debt service estimated to come due on such bonds during Fiscal Year 2025-26, and believes that said bonds will be sold during said Fiscal Year;

NOW, THEREFORE, BE IT RESOLVED by the Board of Trustees of the Lowell Joint School District:

Section 1. Recitals. All of the above recitals are true and correct.

Section 2. Estimate of Tax Levy. The Superintendent or the Assistant Superintendent, Business Services of the District or such other officer of the District as either authorized officer may designate (each, an “Authorized District Representative”), are hereby authorized and directed to prepare an estimate of all payments of principal and interest which shall become due on a series of bonds of the District expected to be sold prior to the making of the tax levy for Fiscal Year 2025-26, and to cause the debt service schedule so prepared to be provided to the Board of Supervisors of the County and to the officers of the County responsible for preparing the tax levy for bonds of the District and for levying said tax. The District estimates that the sale of its first series of bonds shall be in an estimated amount of \$35 million, an amount within the District’s authorized but unissued bond allowance, and shall be issued on or about August 20, 2025.

Section 3. Request to County to Levy Tax. The Board of Supervisors of the County is hereby requested, in accordance with Education Code Section 15252-15254, to adopt a tax rate for bonds of the District expected to be sold during Fiscal Year 2025-26, based upon the estimated debt service schedule prepared by officers of the District, and to levy a tax in Fiscal Year 2025-26 on all taxable property in the District sufficient to pay said estimated debt service. The proceeds of such tax shall be deposited into the debt service fund of the District established pursuant to the Education Code for bonds of the District.

Section 4. Application of Tax Proceeds. In the event that bonds of the District are not sold during Fiscal Year 2025-26, or sold in such amount and on such terms that the proceeds of the tax requested in Section 3 hereof, or any portion thereof, are not required for payment of debt service due on the bonds, or payment of other outstanding bonds of the District payable from the debt service fund of the District, this Board hereby requests that the Auditor-Controller, or other appropriate official of the County cause the remaining proceeds of the tax to be held in the debt service fund and applied to debt service on outstanding bonds of the District coming due in Fiscal Year 2025-26.

Section 5. Filing of Resolution. The Secretary of this Board is hereby authorized and directed to file forthwith a certified copy of this Resolution with the Clerk of the Board of Supervisors of the County, and to cause copies of this Resolution to be delivered to the Auditor-Controller and the Treasurer-Tax Collector of the County.

Section 6. Further Authorization. The President of this Board, the Secretary of this Board, or any Authorized District Representative, shall be and they are hereby authorized and directed to take such additional actions consistent with the intent of this Resolution in connection with the sale of bonds of the District, which any of them deem necessary and desirable to accomplish the purpose hereof.

Section 7. Effective Date. This resolution shall take effect from and after its adoption.

PASSED AND ADOPTED this 4th day of August, 2025, by the following vote:

AYES:

NOES:

ABSENT:

ABSTENTIONS:

Anthony A. Zegarra, President of the Board of Trustees of the
Lowell Joint School District

Attest:

Regina L. Woods, Clerk of the Board of Trustees of the
Lowell Joint School District

SECRETARY'S CERTIFICATE

STATE OF CALIFORNIA)
) ss
 ORANGE COUNTY)

I, Jim Coombs, do hereby certify that the foregoing is a true and correct copy of Resolution 2025-206 No. 982 which was duly adopted by the Board of Trustees of the Lowell Joint School District at a meeting thereof, held on the 4th day of August, 2025, and that it was so adopted by the following vote:

AYES:

NOES:

ABSENT:

ABSTENTIONS:

By _____

Jim Coombs, Secretary to the Board of Trustees

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: 2025-26 45 Day Budget Update

INFORMATION

Education Code Section 42147(h) states: "Not later than 45 days after the Governor signs the annual Budget Act, the school district shall make available for public review any revisions in revenues and expenditures that it has made to its budget to reflect the funding made available by that Budget Act." While this language does not specifically require that districts revise their budgets at this time, it does require making the revisions public if the district decides to make revisions based on the Enacted State Budget.

The Governor signed the 2025-26 State Budget into law on June 30, 2025, beginning the 45-day period, which ends on August 14, 2025. The Board adopted the District budget on June 23, 2025. The Enacted State Budget contained minor changes from the Governor's May Revision. Because the May Revision was used to present the 2025-26 Adopted Budget, and the changes to the Adopted Budget are minor, it is advisable that the District update the Adopted Budget to reflect the changes at the First Interim budget presentation on December 1, 2025, at which time the budget will reflect the most current figures available.

DB:ds

Superintendent's Comment:

INFORMATION.

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Piggyback Contract with CN School &
Office Solutions, Inc. for Classroom Furniture (San
Bernardino County Superintendent of Schools Bid
#23/24-0005)

ACTION

Public Contract Code Section 20111 (a) provides that the governing board of any school district shall let any contracts involving an expenditure of more than \$114,800 for any of the following:

- (1) The purchase of equipment, materials, or supplies to be furnished, sold, or leased to the district.
- (2) Services, except construction services.
- (3) Repairs, including maintenance as defined in Section 20115, that are not a public project as defined in subdivision (c) of Section 22002.

Contracts shall be let to the lowest responsive responsible bidder or else reject all bids. Purchases of equipment, materials, supplies, services, and repairs/maintenance in amounts less than \$114,800 need not be bid.

San Bernardino County Superintendent of Schools (San Bernardino County) awarded a competitively-bid contract for Furniture: Systems and Stand Alone to CN School & Office Solutions, Inc. at its regularly-scheduled Board meeting on June 27, 2023. The contract was awarded through June 30, 2025 and, subsequently, extended through June 30, 2026

The special provisions of the San Bernardino County Superintendent of Schools bid/contract provide that the "SBCUSD" and any other school or community college district will have the opportunity to order from this bid in quantities necessary to maintain its operations. Pursuant to Public Contract Code Section 20118, the District can utilize contracts awarded by another school district for the purchase of equipment, materials, supplies, and other personal property under the same prices, terms, and conditions as the awarding school district's contract when provided for in the awarding school district's bid documents. This practice of utilizing another district's competitively-bid contract is known as "piggybacking."

District staff members determined that the work stations identified in the bid/contract awarded to CN School & Office Solutions, Inc. met the needs of the District. District staff members

Superintendent's Comment:

APPROVAL RECOMMENDED.

reviewed the terms and conditions of the bid/contract, assessed the prices to be fair, reasonable, and competitive, and find that it is in the best interest of the District to approve a piggyback agreement with CN School & Office Solutions, Inc. for the purchase of work stations. The savings to the District are between 5-52% off list prices.

The proposals from Culver Newlin are \$83,221.22 and \$60,049.69 for classroom furniture districtwide in the 2025-26 school year.

This agenda item seeks approval of a piggyback agreement with CN School & Office Solutions, Inc. for the purchase of work stations. CN School & Office Solutions, Inc. has proposed to provide these products under the same terms and conditions as the contract awarded to them by "SBCUSD".

It is recommended that the Piggyback Contract with CN School & Office Solutions, Inc. for work stations for an amount not to exceed \$160,000.00 be approved and that the Superintendent or designee be authorized to execute the necessary documents.

DB/ds

Superintendent's Comment:

APPROVAL RECOMMENDED.



500 E. RINCON STREET SUITE 100 | CORONA, CA 92879
TEL: 949.597.0123

Quote

Quote no. 0716DBEN

Sold To:

LOWELL JOINT SCHOOL DISTRICT
11019 VALLEY HOME AVE
WHITTIER, CA 90603

Ship To:

T.B.D.
ATTN: DAVID BENNETT

Date	Lead Time/ ARO	Sales Rep	Terms	Quote Valid Until
7/16/2025	12-14 WEEKS	ALFIE	Due on receipt	08/16/25
Alpha.	Qty	Model #/Description	Unit Price	Total
A	44	PRICING PER SAN BERNARDINO COUNTY SUPERINTENDENT OF SCHOOLS BID NO. 23/24-0005 PRICING. *PRICING INCLUDES FREIGHT, DELIVERY AND INSTALLATION SMITHSYSTEM 01632V# SILHOUETTE SIT/STAND RECTANGLE TOP 20X27 26-41"H W/ CASTERS LAMINATE: FRENCH PEAR EDGE: PLATINUM FRAME: PLATINIUM LIST 709.00	517.57	22,773.08T
B	65	SMITHSYSTEM EL4872#EA ELEMENTAL KIDNEY TABLE 48X72 19-33H (SET TO 29"H) GLIDES, NO CASTERS LAMINATE: FRENCH PEAR EDGE: PLATINUM FRAME: PLATINUM LIST 761.00	532.70	34,625.50T
C	16	SMITH SYSTEM 01272-FRP-PLT-PLT PLANNER SINGLE STUDENT DESK 20X27 22-32"H (SET TO 25"H) W/ GLIDES, NO CASTERS 15X20 4"H LAMINATE: FRENCH PEAR EDGE: PLATINUM FRAME: PLATINUM LIST 316.00	230.68	3,690.88T

Signature

Subtotal
Sales Tax (10.25%)
Total

Please note pricing on this quotation is valid for 30 days



500 E. RINCON STREET SUITE 100 | CORONA, CA 92879
TEL: 949.597.0123

Quote

Quote no. 0716DBEN

Sold To:

LOWELL JOINT SCHOOL DISTRICT
11019 VALLEY HOME AVE
WHITTIER, CA 90603

Ship To:

T.B.D.
ATTN: DAVID BENNETT

Date	Lead Time/ ARO	Sales Rep	Terms	Quote Valid Until
7/16/2025	12-14 WEEKS	ALFIE	Due on receipt	08/16/25
Alpha.	Qty	Model #/Description	Unit Price	Total
D	16	SMITH SYSTEM 17190 STEEL BOOK BOX LIST 88.00	ea	64.24
E	24	VS 31400 PANTOSWING LUPO FORWARD FLEXING CANTILEVER CHAIR 15"H (RED DOT) 2-COMP GLIDES SHELL: 073 BLACK/GREY METAL: 059 ARCTIC LIST 158.00	ea	148.52
F	37	1-2ND GRADE VS 31400 PANTOSWING LUPO FORWARD FLEXING CANTILEVER CHAIR 17"H (GREEN DOT) 2-COMP GLIDES SHELL: 073 BLACK/GREY METAL: 059 ARCTIC LIST 158.00 3-4TH GRADE	ea	148.52

Subtotal

Sales Tax (10.25%)

Total

Signature

Please note pricing on this quotation is valid for 30 days



500 E. RINCON STREET SUITE 100 | CORONA, CA 92879
TEL: 949.597.0123

Quote

Quote no. 0716DBEN

Sold To:

LOWELL JOINT SCHOOL DISTRICT
11019 VALLEY HOME AVE
WHITTIER, CA 90603

Ship To:

T.B.D.
ATTN: DAVID BENNETT

Date	Lead Time/ ARO	Sales Rep	Terms	Quote Valid Until
7/16/2025	12-14 WEEKS	ALFIE	Due on receipt	08/16/25
Alpha.	Qty	Model #/Description	Unit Price	Total
G	29	VS 31400 PANTOSWING LUPO FORWARD FLEXING CANTILEVER CHAIR 18 1/8"H (BLUE DOT) 2-COMP GLIDES SHELL: 073 BLACK/GREY METAL: 059 ARCTIC LIST 158.00 5-6TH GRADE	ea 148.52	4,307.08T

Signature _____

Please sign and return approval copy to Culver Newlin, Inc.. All orders are non-cancellable, CUSTOMER NOTE: The standard terms and conditions of sale including warranty information apply.

Subtotal	\$75,484.10
Sales Tax (10.25%)	\$7,737.12
Total	\$83,221.22

Please note pricing on this quotation is valid for 30 days



500 E. RINCON STREET SUITE 100 | CORONA, CA 92879
TEL: 949.597.0123

Quote

Quote no. 0722JOR

Sold To:

LOWELL JOINT SCHOOL DISTRICT
11019 VALLEY HOME AVE
WHITTIER, CA 90603

Ship To:

JORDAN ELEMENTARY
10654 JORDAN ROAD
WHITTIER, CA 90603
ATTN: DAVID BENNETT

Date	Lead Time/ ARO	Sales Rep	Terms	Quote Valid Until
7/22/2025	12-14 WEEKS	ALFIE	Due on receipt	08/22/25
Alpha.	Qty	Model #/Description	Unit Price	Total
A	22	PRICING PER SAN BERNARDINO COUNTY SUPERINTENDENT OF SCHOOLS BID NO. 23/24-0005 PRICING. *PRICING INCLUDES FREIGHT, DELIVERY AND INSTALLATION SMITHSYSTEM EL4872#EA ELEMENTAL KIDNEY TABLE 48X72 19-33H (SET TO 29"H) GLIDES, NO CASTERS LAMINATE: FRENCH PEAR EDGE: PLATINUM FRAME: PLATINUM LIST 761.00	ea 532.70	11,719.40T
B	25	SMITH SYSTEM 01272-FRP-PLT-PLT PLANNER SINGLE STUDENT DESK 20X27 22-32"H (SET TO 25"H) W/ GLIDES, NO CASTERS 15X20 4"H LAMINATE: FRENCH PEAR EDGE: PLATINUM FRAME: PLATINUM LIST 316.00	ea 230.68	5,767.00T
C	48	SMITH SYSTEM 17190 STEEL BOOK BOX LIST 88.00	ea 64.24	3,083.52T

Signature

Subtotal
Sales Tax (10.25%)
Total

Please note pricing on this quotation is valid for 30 days



500 E. RINCON STREET SUITE 100 | CORONA, CA 92879
TEL: 949.597.0123

Quote

Quote no. 0722JOR

Sold To:

LOWELL JOINT SCHOOL DISTRICT
11019 VALLEY HOME AVE
WHITTIER, CA 90603

Ship To:

JORDAN ELEMENTARY
10654 JORDAN ROAD
WHITTIER, CA 90603
ATTN: DAVID BENNETT

Date	Lead Time/ ARO	Sales Rep	Terms	Quote Valid Until
7/22/2025	12-14 WEEKS	ALFIE	Due on receipt	08/22/25
Alpha.	Qty	Model #/Description	Unit Price	Total
D	105	VS 31400 PANTOSWING LUPO FORWARD FLEXING CANTILEVER CHAIR 15"H (RED DOT) 2-COMP GLIDES SHELL: 073 BLACK/GREY METAL: 059 ARCTIC LIST 158.00 1-2ND GRADE	ea 148.52	15,594.60T
E	29	VS 31400 PANTOSWING LUPO FORWARD FLEXING CANTILEVER CHAIR 17"H (GREEN DOT) 2-COMP GLIDES SHELL: 073 BLACK/GREY METAL: 059 ARCTIC LIST 158.00 3-4TH GRADE	ea 148.52	4,307.08T
F	30	VS 31400 PANTOSWING LUPO FORWARD FLEXING CANTILEVER CHAIR 18 1/8"H (BLUE DOT) 2-COMP GLIDES SHELL: 073 BLACK/GREY METAL: 059 ARCTIC LIST 158.00 5-6TH GRADE	ea 148.52	4,455.60T

Subtotal**Sales Tax (10.25%)**

Total

Signature

Please note pricing on this quotation is valid for 30 days



500 E. RINCON STREET SUITE 100 | CORONA, CA 92879
TEL: 949.597.0123

Quote

Quote no. 0722JOR

Sold To:

LOWELL JOINT SCHOOL DISTRICT
11019 VALLEY HOME AVE
WHITTIER, CA 90603

Ship To:

JORDAN ELEMENTARY
10654 JORDAN ROAD
WHITTIER, CA 90603
ATTN: DAVID BENNETT

Date	Lead Time/ ARO	Sales Rep	Terms	Quote Valid Until
7/22/2025	12-14 WEEKS	ALFIE	Due on receipt	08/22/25
Alpha.	Qty	Model #/Description	Unit Price	Total
G	6	SMITHSYSTEM 610024000P# CASCADE MEGA CABINET 19X43 43.3"H OPEN W/ CASTERS 24 3" TOTES POWDERCOAT END PANELS: PLATINUM LIST 2178.00	ea 1,589.94	9,539.64T

Subtotal	\$54,466.84
Sales Tax (10.25%)	\$5,582.85
Total	\$60,049.69

Signature _____

Please sign and return approval copy to Culver Newlin, Inc.. All orders are non-cancellable, CUSTOMER NOTE: The standard terms and conditions of sale including warranty information apply.

Please note pricing on this quotation is valid for 30 days



San Bernardino County Superintendent of Schools

Ted Alejandre
County Superintendent

Transforming lives through education

February 20, 2025

CN School & Office Solutions, Inc.
(Culver-Newlin)
ATTN: Devyn Goss
500 E. Rincon St.,
Suite 100
Corona, CA 92879

RE: BID 23/24-0005 FURNITURE: SYSTEMS AND STAND ALONE

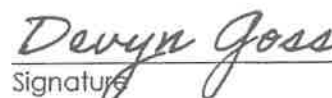
Dear Devyn Goss,

BID#23/24-0005 Furniture: Systems and Stand Alone was awarded to CN School & Office Solutions, Inc. on July 1, 2023, and expires on June 30, 2025. San Bernardino County Superintendent of Schools would like to exercise the (THIRD) one-year option and renew the contract for year THREE (3) of the THREE (3) year optional agreement. Effective July 1, 2025, through and including June 30, 2026. All conditions of BID#23/24-0005 will remain in effect for the 2025-2026 fiscal year.

Please confirm the extension of the agreement for the 2025-2026 fiscal year by signing below. Upon acceptance by both parties, a fully executed copy will be returned to you for your records. The San Bernardino County Superintendent of Schools looks forward to continuing our relationship with your company.

 2/21/25
Signature Date

Kevin Garcia, Program Manager
Procurement Services

 02/21/2025
Signature Date

VICE PRESIDENT

Title

Devyn Goss
CN School & Office Solutions, Inc.
(Culver-Newlin)

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Architectural Services Agreement with Ghataode Bannon Architects (GBA) to Increase Reimbursable Expenses for the District's Rancho Starbuck Intermediate School Measure "P" Project ACTION

Background:

On February 5, 2024, the Board of Trustees awarded an architectural and engineering services contract to Ghataode Bannon Architects for future projects identified in the 2023 Lowell Joint School District Master Facilities Plan approved by the Board of Trustees on October 2, 2023. As part of that proposal for the architectural services fee contract, the Board approved an amount of \$120,000 for reimbursable expenses incurred on the District's behalf separate from the architectural fees with Ghataode Bannon Architects.

Current Considerations:

The District would like to add an additional \$30,000 to cover any additional reimbursable expenses if incurred during the construction phase of Rancho Starbuck, Measure "P" project. Any encumbered unspent funds will be returned to the Measure "P" funds upon completion of the project accounting.

Financial Implications

Rancho Starbuck Financial Impact:	\$30,000.00
Funding Source:	Fund 40.0 - Special Reserve Capital Outlay

Recommendation:

It is recommended that the Board of Trustees approve the increase to the agreement with Ghataode Bannon Architect, PO U99B0004, for reimbursable expenses related to the Rancho Starbuck Intermediate School project, effective August 5, 2025, not to exceed \$30,000.00, (Special Reserve Capital Outlay, Fund 40.0), and that the Superintendent or designee be authorized to execute the necessary documents.

DB: cw

Superintendent's Comment:

APPROVAL RECOMMENDED.

July 23, 2025

David Bennett
Assistant Superintendent of Business Services
LOWELL JOINT SCHOOL DISTRICT
11019 Valley Home Avenue
Whittier, CA 90603

Re: Architectural/Engineering Services
Rancho Starbuck 2.0 Reimbursables Expenses

Dear David,

Ghataode Bannon Architects (GBA) submits this proposal requesting an increase to the Rancho Starbuck IS 2.0 project Reimbursable Expenses. Additional soil improvement engineering is required due to unforeseen conditions at the site.

REIMBURSABLE EXPENSES

GBA shall coordinate the acquisition of soil improvement engineering on behalf of the District. GBA shall make payments on behalf of the District as a reimbursable expense.

The estimated, not-to-exceed, reimbursable expense increase is \$30,000.

The total, not-to-exceed, reimbursable expense amount is now \$150,000.

If there are any questions, please feel free to call.

Sincerely,



David Bannon, AIA
:DB

R:\GBA Projects\Lowell Joint School District\Rancho Starbuck 2.0\250723 Rancho Starbuck 2.0 Additional Reimbursables.docx

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Resolution No. 2025/26 No. 983 Approving the Guaranteed
Maximum Price of \$25,827,311.00 for the Lease-Leaseback
Contract with Erickson Hall Construction Company, Inc.,
for the New Modular Buildings and Gymnasium/Performing
Arts Center Project at Rancho Starbuck Intermediate School

ACTION/
(RESOLUTION)

Background:

As part of the Measure P General Obligation Bond Program, the District plans to perform new modular building and gymnasium/performing arts center, and related work, at Rancho Starbuck Intermediate School, ("Project") utilizing the lease-leaseback construction delivery method, whereby the District leased the site that it owns to a contractor who will construct improvements thereon and lease the Project and the underlying site back to the District.

Current Considerations:

At the December 16, 2024 Board meeting, Board members took action to approve the award of Pre-Construction and Lease-Leaseback Services for Rancho Starbuck Intermediate School. The contract was awarded to Erickson Hall Construction Company, Inc.

On Thursday, June 23, 2025, Erickson Hall Construction Company, Inc., accepted bids for the Rancho Starbuck Intermediate School project. Subsequently, on July 8, 2025, Erickson Hall Construction Company, Inc., presented site specific conditions, general conditions, and bids for each trade represented in the Rancho Starbuck Intermediate School new modular building and gymnasium/performing arts center, and related work (see below).

- Survey and Utility Locating
- Final Clean
- Erosion Control
- Demolition, Earthwork & Segmental Retaining Walls
- Asphalt Paving & Striping
- Landscaping
- Fencing
- Concrete, Reinforcing Steel & Unit Paving
- Structural Steel & Metal Decking
- Masonry
- Waterproofing
- Casework
- Insulation
- Roofing & Sheet Metal
- Door, Frames, & Hardware

Superintendent's Comment:

ADOPTION BY MAJORITY ROLL CALL VOTE RECOMMENDED.

- Coiling Doors
- Glazing
- Gypsum Board
- Tile
- Acoustical Ceilings
- Flooring & Wood Flooring
- Painting
- Signage
- Window Treatments
- Wheelchair Lifts
- Toilet Accessories, Operable Partitions, Fire Extinguishers
- Athletic Equipment, Theater and Stage Equipment, Lockers & Marquees
- Fire Sprinklers
- Plumbing & Site Utilities
- HVAC
- Electrical, Communications, Fire Alarm & Audio-Visual Equipment
- Site Specific Conditions & Traffic Control
- General Conditions
- Value Engineering Allowance
- Approved Value Engineering

With the bids received, a Guaranteed Maximum Price (GMP) is established. GMP is the all-inclusive price agreed upon between the District and the Lease-Leaseback Contractor Erickson Hall Construction Company, Inc., that shall not be exceeded for the construction of the project. The GMP includes costs for the sublease payments being paid by the District as progress payments and retention payment during construction in accordance with the Construction Services Agreement. The only costs outside the GMP are owner requested additional work, and unforeseen underground soil conditions or unforeseen hazardous materials. The GMP for the Rancho Starbuck Intermediate School Modular Building, Gymnasium/Performing Arts Center, and Related Work project is \$25,327,311.00 and will be funded through Fund 40 – Special Reserve Capital Outlay Fund, and Fund 21 – Capital Building Fund. The District will add a \$500,000 allowance for contingencies to be carried outside the GMP.

The Erickson Hall Construction Company, Inc., GMP is based on actual procured quotes and bids from subcontractors, vendors, and suppliers, and includes an estimate of overhead and profit along with the cost of supplied labor.

Financial Implications:

Financial Impact:	\$25,827,311.00
Funding Source:	Fund 40 – Special Reserve Capital Outlay Fund
	Fund 21 – Capital Building Fund

Recommendation:

It is recommended that the Board adopt Resolution 2025/26 No. 983 approving the Guaranteed Maximum price of \$25,827,311.00 for the Lease-Leaseback Contract with Erickson Hall Construction Company, Inc., for the Modular Building, Gymnasium/Performing Arts Center, and Related Work, at Rancho Starbuck Intermediate School.

Superintendent's Comment:

ADOPTION BY MAJORITY ROLL CALL VOTE RECOMMENDED.

**LOWELL JOINT SCHOOL DISTRICT
RESOLUTION 2025-2026 NO. 983
RESOLUTION OF THE BOARD OF TRUSTEES OF THE
LOWELL JOINT SCHOOL DISTRICT
OF LOS ANGELES AND ORANGE COUNTIES, CALIFORNIA,
RESOLUTION APPROVING THE GUARANTEED MAXIMUM PRICE FOR THE
LEASE-LEASEBACK CONTRACT WITH ERICKSON-HALL CONSTRUCTION CO.
FOR THE GYMNASIUM/PERFORMING ARTS CENTER, CLASSROOM BUILDING,
AND RELATED WORK AT RANCHO STARBUCK INTERMEDIATE SCHOOL**

WHEREAS, as set forth in Resolution No. 955, the governing Board of Education (“Board”) for the Lowell School District (“District”) approved the selection of Erickson-Hall Construction Co. (“Contractor”) as the lease-leaseback contractor for the Gymnasium/Performing Arts Center, Classroom Building, and Related Work at Rancho Starbuck Intermediate School (“Project”);

WHEREAS, Contractor has provided the District with objectively verifiable information of its costs to perform the services requested in the lease-leaseback contract for the Project;

WHEREAS, the Contractor has completed all required preconstruction services for the Project pursuant to the Pre-Construction Services Agreement entered into with the District;

WHEREAS, the Contractor has selected subcontractors for the Project not identified in its proposal pursuant to Education Code section 17406(a)(4);

WHEREAS, the plans and specifications for the Project have been approved by the Division of the State Architect; and

WHEREAS, the Contractor has provided the District with written rationale for the Guaranteed Maximum Price (“GMP”) for the Project and provided documentation sufficient to support the GMP.

NOW, THEREFORE, THE BOARD OF EDUCATION OF THE LOWELL JOINT SCHOOL DISTRICT DOES HEREBY RESOLVE, DETERMINE, AND ORDER AS FOLLOWS:

Section 1. Recitals. All of the recitals herein contained are true and correct.

Section 2. Approval of Guaranteed Maximum Price. Pursuant to Education Code section 17406(a)(3), the District’s Board hereby approves the GMP for the Project in the amount of \$25,827,311.00, inclusive of all contingencies and allowances.

Section 3. Effective Date. This Resolution No. 893 shall take effect upon adoption.

APPROVED AND ADOPTED this 4th day of August, 2025, by the following vote of the members of the Governing Board of the Lowell Joint School District.

AYES:

NOES:

ABSTAIN:

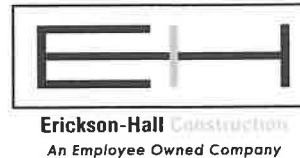
ABSENT:

I, Jim Coombs, Secretary to the Board of Trustees of the Lowell Joint School District of Los Angeles and Orange Counties, California, hereby certify that the above and foregoing amended resolution was duly and regularly adopted by the said Board at a regular meeting thereof held on the 4th day of August, 2025, and passed by a unanimous vote of those present.

IN WITNESS WHEREOF, I have hereunto set my hand and seal the 4th day of August, 2025.

Jim Coombs, Secretary to the Board of Trustees

Erickson-Hall Construction Co.
Guaranteed Maximum Price
Revised Rancho Starbuck 7/30/25 GMP



	RANCHO STARBUCK PAC/GYM BUILDING	VE GMP
1	Survey & Utility Locating	79,794
2	Final Clean	23,756
3	Erosion Control	72,565
4	Demolition, Earthwork & Segmental Retaining Walls	1,346,082
5	Asphalt Paving & Striping	14,690
6	Landscaping	567,999
7	Fencing	678,442
8	Concrete, Reinforcing Steel & Unit Paving	3,820,920
9	Structural Steel & Metal Decking	2,150,690
10	Masonry	1,345,820
11	Waterproofing	80,468
12	Casework	235,746
13	Insulation	14,000
14	Roofing & Sheet Metal	1,726,307
15	Doors, Frames, & Hardware	203,652
16	Coiling Doors	62,777
17	Glazing	275,461
18	Gypsum Board	1,099,006
19	Tile	36,678
20	Acoustical Ceilings	357,925
21	Flooring & Wood Flooring	495,325
22	Painting	121,380
23	Signage	33,484
24	Window Treatments	31,496
25	Wheelchair Lifts	145,728
26	Toilet Accessories, Operable Partitions & Fire Extinguishers	109,869
27	Athletic Equipment, Theater and Stage Equipment, Lockers & Ma	1,246,196
28	Fire Sprinklers	152,490
29	Plumbing & Site Utilities	1,457,165
30	HVAC	778,701
31	Electrical, Communications, Fire Alarm & Audio-Visual Equipment	3,897,335
32	Site Specific Conditions & Traffic Control	331,669
33	General Conditions	1,713,195
34	VE Allowance	100,000
35	Approved Value Engineering	-1,386,134
	Subtotal	23,420,677
	Fee - 3.9%	913,406
	Subtotal	24,334,083
	G/L Insurance - 1%	243,341
	Bonds - 1%	253,273
	Subtotal	24,830,697
	Project Contingency - 1%	248,307
	E&O Contingency - 1%	248,307
	Guaranteed Maximum Price	25,327,311

RANCHO STARBUCK PAC/GYM BUILDING

GMP Clarifications

July 30, 2025

The attached GMP Summary reflects the Erickson-Hall Construction Co. (EHCC) GMP for the construction of RANCHO STARBUCK PAC/GYM BUILDING as designed by Ghataode Bannon Architects.

This GMP is based on the following documents:

1. Plans Titled RANCHO STARBUCK NEW PERFORMING ARTS CENTER / GYMNASIUM BUILDING & MODULAR CLASSROOM BUILDING - DSA Approved 6/12/25
2. Specifications titled NEW PERFORMING ARTS CENTER/GYMNASIUM BUILDING A# 03-124760 - DSA Approved 6/12/25
3. Geotechnical Investigation Dated: 7/23/24
4. Additional Geotechnical Investigation Dated: 5/14/25
5. 03-124760 Rancho PAC-Gym BID ADDENDUM 00
6. 03-124760 Rancho PAC-Gym BID ADDENDUM 01
7. 03-124760 Rancho PAC-Gym BID ADDENDUM 02_25-06-13

This GMP is based on the following Clarifications:

1. This GMP excludes any and all fees and permits
2. Erosion control/BMP's based on standard practices and implementation. No erosion control plan provided in contract/bidding documents.
3. COC Insurance is not included in GMP. COC Insurance quote to be provided to district and paid for outside of GMP. COC insurance pricing assumes that the District's current property coverage will cover the value of the existing improvements during construction and will remain in place during the project. If the District's current property coverage does not cover the existing building values, the COC amount will be subject to revisions. Any revisions to COC contained within this GMP can be made for an additional cost to the District. The Builder's Risk insurance is included in the GMP but does not contain terrorism coverage.
4. EHCC is excluding paying deductibles for District's insurance policies

EHCC is excluding LEED submittals and sustainability requirements. EHCC is assuming this is not a LEED Certified

5. Project so no EHCC administrative resources are dedicated to tracking the LEED score card
6. EHCC is excluding delegated design/engineering

END.

Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Survey & Utility Locating		Rick Engineering	Adkan	F3
Scope Items	Total			
Total Survey	64,380	64,380	76,500	89,648
Layout Building H	Incl w/ Rick	Incl	-	-
Layout Building J & Pier Footings	Incl w/ Rick	Incl	-	-
Layout Demolition Limits	Incl w/ Rick	Incl	-	-
Layout Hardscapes	Incl w/ Rick	Incl	-	-
Layout Site Seat Walls	Incl w/ Rick	Incl	-	-
Layout Water, Fire, Sewer & Storm	Incl w/ Rick	Incl	-	-
Layout Dry Utilities	Incl w/ Rick	Incl	-	-
Pad Certification	Incl w/ Rick	Incl	-	-
Rough Grade Stakes	Incl w/ Rick	Incl	-	-
Topography Verification	Incl w/ Rick	Incl	-	-
Utility Markout	4,933	-	-	-
Survey Of Top Of Anchor Bolts Before And After Placement Of Concrete	6,283	-	-	-
Resurvey	4,198	-	-	-
Total	79,794			

Confidential Proprietary Pricing Information of Erickson-Hall - not to be released as a Public Record

Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Final Clean		Pacific Coast Cleaning	Gridiron
Scope Items	Total		
Total Final Clean	23,756	23,756	27,147
Final Building Clean H	Incl w/ PCC	Incl	Incl
Final Building Clean J	Incl w/ PCC	Incl	Incl
Final Site Clean	Incl w/ PCC	Incl	Incl
Total	23,756		

Confidential Proprietary Pricing Information of Erickson-Hall - not to be released as a Public Record

Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Erosion Control		BMP Solutions	GST	Incompl
Scope Items	Total			
Erosion Control Total	48,275	48,275	66,965	-
Bmp Installation	Incl w/ BMP	Incl	Incl	-
Entry Rumble Plate Rental - 17 Months	Incl w/ BMP	Incl	Incl	-
Erosion Control Maintenance - 17 Months	Incl w/ BMP	Incl	Incl	-
Swppp	24,290	26,557	33,350	24,290
Qsd	Incl w/ Incompl	Incl	33,350	Incl
Qsp	Incl w/ Incompl	Incl	Incl	Incl
Total	72,565			

Confidential Proprietary Pricing Information of Erickson-Hall - not to be released as a Public Record

Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Demolition, Earthwork & Segmental Retaining Walls		JK Excavating & Grading	Triangle Enterprises	KAR	Ortiz	Post
Scope Items	Total					
Site Demolition Total	1,073,002	1,073,002	1,391,592	1,938,486	2,437,708	2,602,857
Demo Asphalt	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Demo CI Fencing, Posts & Footings	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Demo Cmu Walls	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Demo Existing Bench	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Demo Existing Bicycle Rack	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Demo Existing Light Post And Footing	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Demo Existing Shed	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Demo Existing Wall	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Demo Guard Rail	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Demo Tree And Roots	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Removal Of Remaining Traces Of Portable Foundations, Landings, Any Misc Items After D	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Sawcut & Demo Asphalt & Base	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Sawcut & Demo Concrete Paving & Base	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Earthwork Total	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Balance Site	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Clear & Grub Landscape	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Fine Grade Building Pads	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Grading Keyway For Landscape Scope	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Over-Ex Building Pad	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Over-Ex Hardscape	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Rough Grade Site	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Slot Cutting	Incl w/ JK	Incl	Incl	Incl	Incl	Incl
Shurry @ Retaining Wall FTG Subgrade	Incl w/ JK	Incl	-	-	-	-
Spray-On Bonded Fiber	Incl w/ JK	Incl	-	Incl	Incl	Incl
Tensar & Aggregate Base	166,805	166,806	Incl	Incl	Incl	Incl
Relocate 3 Containers	12,500	-	-	-	-	-
Access / Repair for removal of relocatables	18,476	-	-	-	-	-
Allowance: DTSC Soil Testing	30,000	-	-	-	-	-
Backfill Stage & Ramps	24,720	-	-	-	-	-
Grading our access ramp / laydown to bottom of field	20,579	-	-	-	-	-
Total	1,346,082					

Confidential Proprietary Pricing Information of Erickson-Hall - not to be released as a Public Record

Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Asphalt Paving & Striping		Maggard	
Scope Items	Total		
Pavement Markings Total	14,690	14,690	
Striping & Site Signage Total	Incl w/ Maggard	Incl	
Directional Arrows	Incl w/ Maggard	Incl	
Electric Vehicle Parking Signs	Incl w/ Maggard	Incl	
Paint Ada & Parking Stalls	Incl w/ Maggard	Incl	
Paint Curb Red & Stencil Fire Lane No Parking	Incl w/ Maggard	Incl	
Safe Dispersal Area Sign	Incl w/ Maggard	Incl	
Site Entrance Sign	Incl w/ Maggard	Incl	
Site Signage	Incl w/ Maggard	Incl	
Tow Away Sign	Incl w/ Maggard	Incl	
Wheel Stops	Incl w/ Maggard	Incl	
Total	14,690		

Confidential Proprietary Pricing Information of Erickson-Hall - not to be released as a Public Record

Bid Analysis
RANCHO STARBUCK PAC/GYM BUILDING
 Bid Date: June 19, 2025

Landscaping		Earthscapes	Zunigasces	Pierre	Southern California	Cost
Scope Items	Total					
Landscape & Irrigation Total	555,726	555,726	578,057	587,257	614,856	67
Hydroseed New Field Turf Per Plans	Incl w/ Earthscapes	Incl	Incl	Incl	Incl	I
Trees	Incl w/ Earthscapes	Incl	Incl	Incl	Incl	I
Shrubs/Groundcover	Incl w/ Earthscapes	Incl	Incl	Incl	Incl	I
Bicycle Rack	10,425	-	-	Incl	Incl	I
Landscape Spoils	1,848	-	-	-	-	
Total	567,999					

Confidential Proprietary Pricing Information of Erickson-Hall - not to be released as a Public Record

Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Fencing		TWC	Cova *
Scope Items	Total		
Fences & Gates Total	671,586	607,767	671,586
Fence Footings	Incl w/ COVA	incl	Incl
20' Fire Access Gate (2)	Incl w/ COVA	incl	Incl
Bicycle Rack Enclosure	Incl w/ COVA	incl	Incl
Chainlink Fence	Incl w/ COVA	incl	Incl
Chainlink Gate	Incl w/ COVA	incl	Incl
Decorative Metal Fence	Incl w/ COVA	incl	Incl
Decorative Metal Swing Gate	Incl w/ COVA	incl	Incl
Panic Hardware	Incl w/ COVA	incl	Incl
Rolling Chainlink Gate	Incl w/ COVA	incl	Incl
Black PVC Slats	Incl w/ COVA	incl	Incl
Knox Box	2,852	-	-
Removal Of Fence Footing Spoils	4,004	-	-
Total	678,442		

* Is Low Bidder when e

Confidential Proprietary Pricing Information of Erickson-Hall - not to be released as a Public Record

Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Concrete, Reinforcing Steel & Unit Paving		Bravo	KAR	United Brothers	IBCC	Devries Construction	Hamel Concrete	Bulldog
Scope Items	Total							
Structural Concrete Total	3,809,308	3,809,308	3,705,438	4,274,591	4,803,920	5,388,816	1,528,850	-
Building Slab	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	Incl	-
Concrete Columns At Roof Per 10/5301	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	Incl	-
Concrete Pads Below Interlocking Unit Pavers	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	Incl	-
Continuous Footings	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	Incl	-
Curbs @ Lockers	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	Incl	-
Depressed Slab @ Gym & Restrooms	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	Incl	-
Endwall/Stamwalls @ Building J Foundation	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	Incl	-
Engineered Shoring For Stage Columns And Beam	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	Incl	-
Lightweight Concrete Deck Fill	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	Incl	-
Pad Footings	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	Incl	-
Pier Footings @ Building J Foundation	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	Incl	-
Rat Slab @ Building J Foundation	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	Incl	-
Sand Bedding	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	Incl	-
Set Volleyball Floor Inserts	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	Incl	-
Vapor Retarder @ Building J Foundation	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	Incl	-
Site Concrete Total	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	-	-
Concrete Washout Disposal	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	-	-
Construct Concrete Curb & Gutters	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	-	-
Construct Heavy Duty Concrete Pavement Per 1/C3.00	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	-	-
Construct Light Duty (Conventional Vehicles) Rated Concrete Pavement Per 1/C3.00	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	-	-
Construct Light Duty (Pedestrian) Concrete Pavement Per 1/C3.00	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	-	-
Site Joint Sealants	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	-	-
Site Light Fixture Pole Bases	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	-	-
Site Retaining Walls & Footings	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	-	-
Site Seat Wall	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	-	-
Swale	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	-	-
Truncated Domes	Incl w/ Bravo	Incl	Incl	Incl	Incl	Incl	-	-
Agg. Base @ Curbs, Gutters, Swales	Incl w/ Bravo	Incl	Incl	Incl	Incl	-	-	-
Interlocking Unit Pavers Total	98,627	-	-	-	-	-	-	98,627
Spoils Removal	71,225	-	-	-	-	-	-	-
Slab And Flatwork Protection	36,513	-	-	-	-	-	-	-
Housekeeping Pads for Electrical	5,250	-	-	-	-	-	-	-
Total	3,820,920							

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Bid Analysis
RANCHO STARBUCK PAC/GYM BUILDING
 Bid Date: June 19, 2025

Structural Steel & Metal Decking		OC Erectors	Anderson Charensky Steel	Vulcan Steel	Junior	Crown	Eckles
Scope Items	Total						
Structural Steel Total	1,905,884	1,905,884	1,939,200	2,346,980	2,407,575	2,459,375	-
Anchor Plates @ Building J Foundation	Incl w/ OCE	Incl	Incl	Incl	Incl	Incl	-
Bent Plates	Incl w/ OCE	Incl	Incl	Incl	Incl	Incl	-
Bollards	Incl w/ OCE	Incl	Incl	Incl	Incl	Incl	-
Guard Rail @ Stairs	Incl w/ OCE	Incl	Incl	Incl	Incl	Incl	-
Metal Decking Staging/Hoisting By Steel Contractor	Incl w/ OCE	Incl	Incl	Incl	Incl	Incl	-
Metal Pan Stairs	Incl w/ OCE	Incl	Incl	Incl	Incl	Incl	-
Roof Access Ladders	Incl w/ OCE	Incl	Incl	Incl	Incl	Incl	-
Safety Cable Install	Incl w/ OCE	Incl	Incl	Incl	Incl	Incl	-
Steel Handrails	Incl w/ OCE	Incl	Incl	Incl	Incl	Incl	-
Steel Trusses	Incl w/ OCE	Incl	Incl	Incl	Incl	Incl	-
Metal Decking Total	195,672	239,848	-	-	-	-	195,672
Access Grates	3,528	-	-	-	-	-	-
Weld Plates	6,000	-	-	-	-	-	-
Miscellaneous Steel Supports at Roof Openings (7/5015)	10,446	-	-	-	-	-	-
FOB Labor	29,862	-	-	-	-	-	-
Total	2,150,890						

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Bid Analysis
RANCHO STARBUCK PAC/GYM BUILDING
 Bid Date: June 19, 2025

Masonry		Haxton	New Dimension	Cornerstone	K & S	Ne
Scope Items	Total					
Masonry Total	1,283,160	1,283,160	1,292,282	1,296,533	1,403,441	1,51
12" Cmu Retaining Wall	Incl w/ Haxton	Incl	Incl	Incl	Incl	I
Caulking & Expansion Joints	Incl w/ Haxton	Incl	Incl	Incl	Incl	I
Cmu Face Shells @ Concrete Columns	Incl w/ Haxton	Incl	Incl	Incl	Incl	I
Grout Embeds	Incl w/ Haxton	Incl	Incl	Incl	Incl	I
Acid Wash Face Of Masonry (Sure Klean Custom Masonry Cleaner By Prosoco)	Incl w/ Haxton	Incl	Incl	Incl	Incl	I
Masonry Reinforcing Steel	Incl w/ Haxton	Incl	Incl	Incl	Incl	I
Set Embeds	Incl w/ Haxton	Incl	Incl	Incl	Incl	I
Shoring For Cmu	Incl w/ Haxton	Incl	Incl	Incl	Incl	I
Sawcut for Reglet	14,720	-	-	-	-	
Layout Embeds	47,940	-	-	-	-	
Total	1,345,820					

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Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Waterproofing		Bielski	
Scope Items	Total		
Waterproofing Total	55,770	55,770	
Site Concrete Caulking & Expansion Joints	Incl w/ Bielski	Incl	
Waterproofing at site CIP wall	Incl w/ Bielski	Incl	
Waterproofing at site Masonry wall	Incl w/ Bielski	Incl	
Building H Foundation	Incl w/ Bielski	Incl	
Joint Sealants	24,698	-	
Total	80,468		

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Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Casework		Stolo	Dennis Reeves
Scope Items	Total		
Casework Total	235,746	235,746	246,356
Plam Countertops	Incl w/ Stolo	Incl	Incl
Wood Plank Paneling Veneer	Incl w/ Stolo	Incl	Incl
Total		235,746	

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Bid Analysis
RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Insulation		Spec 7	SPV	Alcal	Alert
Scope Items		Total			
Insulation Total	14,000	14,000	14,073	17,197	17,470
Acoustical Insulation	Incl w/ Spec 7	Incl	Incl	Incl	Incl
Total	14,000				

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Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Doors, Frames, & Hardware		Precision	Whitehead
Scope Items	Total		
Doors, Frames, & Hardware Total	203,652	203,652	216,240
Door Hardware	Incl w/ Precision	Incl	Incl
Hollow Metal Doors & Frames	Incl w/ Precision	Incl	Incl
Panic Hardware	Incl w/ Precision	Incl	Incl
Total	203,652		

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Bid Analysis
RANCHO STARBUCK PAC/GYM BUILDING
 Bid Date: June 19, 2025

Roofing & Sheet Metal		Rite-Way Roof	Roof Construction	Commercial Roofing Systems	Chapman	Letier	Best	Challenger	Marana
Scope Items	Total								
Roofing Total	804,833	804,833	1,065,883	1,163,108	1,187,744	1,604,536	2,106,466	-	-
Liquid Applied Flashing	Incl w/ Rite Way	Incl	Incl	Incl	Incl	Incl	Incl	-	-
Spa-Modified Bituminous Membrane Roofing	Incl w/ Rite Way	Incl	Incl	Incl	Incl	Incl	Incl	-	-
Sheet Metal Total	663,216	-	-	-	-	Incl	Incl	663,216	731,511
Perforated Airwork Panels	Incl w/ Challenger	-	-	-	-	-	-	Incl	Incl
Aluminum Composite Panels	Incl w/ Challenger	-	-	-	-	Incl	Incl	Incl	Incl
Smoke Vents	Incl w/ Challenger	-	-	-	-	Incl	Incl	Incl	Incl
Roof Access Hatches	Incl w/ Challenger	-	-	-	-	Incl	Incl	Incl	Incl
Aluminum Composite Panels @ Steel Columns	Incl w/ Challenger	-	-	-	-	Incl	Incl	Incl	Incl
Counterflashings	Incl w/ Challenger	-	-	-	-	Incl	Incl	Incl	Incl
Flashings	Incl w/ Challenger	-	-	-	-	Incl	Incl	Incl	Incl
Metal Wall Panels	Incl w/ Challenger	-	-	-	-	Incl	Incl	Incl	Incl
Parapet Capping	Incl w/ Challenger	-	-	-	-	Incl	Incl	Incl	Incl
Perforated Decorative Metal Panel @ Mech Screen	Incl w/ Challenger	-	-	-	-	Incl	Incl	Incl	Incl
Prefinished Steel Metal Cladding Around Structural Hss Beams Per 15-A010	Incl w/ Challenger	-	-	-	-	Incl	Incl	Incl	Incl
Stainless Steel Handrails	Incl w/ Challenger	-	-	-	-	Incl	Incl	Incl	Incl
Perf Panels @ Lobby Dropped Ceiling	Incl w/ Challenger	-	-	-	-	-	-	Incl	-
Tie-Off Anchors	12,386	-	-	-	-	-	-	-	-
Substrate Over Metal Deck Under Insulation	55,419	-	-	-	-	55,419	-	-	-
Rough Carpentry	85,953	-	-	-	-	-	-	-	-
Wood Blocking at Roof	Incl	-	-	-	-	-	-	-	-
Lead Pans	4,500	-	-	-	-	-	-	-	-
Total	1,726,307								

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Bid Analysis
RANCHO STARBUCK PAC/GYM BUILDING
 Bid Date: June 19, 2025

Coiling Doors		McKendry	Overhead Door
Scope Items	Total		
Coiling Doors Total	62,777	62,777	63,859
Pemko Threshold @ Stage	incl w/ McKendry	Incl	Incl
Total		62,777	

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Bid Analysis
RANCHO STARBUCK PAC/GYM BUILDING
 Bid Date: June 19, 2025

Glazing		Platinum	Queen City	Velocity	Pico	Rainbow	LP
Scope Items	Total						
Glazing Total	275,461	275,461	348,840	373,590	397,700	462,738	480,240
Mockup	Incl w/ Platinum	Incl	Incl	Incl	Incl	Incl	Incl
Mirrors @ Danceroom	Incl w/ Platinum	Incl	Incl	Incl	Incl	Incl	Incl
Storefront Doors	Incl w/ Platinum	Incl	Incl	Incl	Incl	Incl	Incl
Storefront Door Hardware	Incl w/ Platinum	Incl	Incl	-	Incl	Incl	Incl
Brake Metal	Incl w/ Platinum	Incl	-	Incl	Incl	Incl	Incl
Ticket Windows	Incl w/ Platinum	Incl	Incl	Incl	Incl	Incl	Incl
SS Counter @ Ticket Windows	Incl w/ Platinum	Incl	-	-	-	-	-
Vision Lites	Incl w/ Platinum	Incl	Incl	Incl	Incl	Incl	Incl
Total	275,461						

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Bid Analysis
RANCHO STARBUCK PAC/GYM BUILDING
 Bid Date: June 19, 2025

Gypsum Board & Plaster		Schmitt	Caston	Standard Drywall	Best Interiors	Brady West	
Scope Items	Total						
Metal Stud & Drywall Total	1,008,978	1,008,978	1,138,871	1,264,520	1,272,180	1,324,759	
Acoustical Sealants (As Applies)	Incl w/ Schmitt	Incl	Incl	Incl	Incl	Incl	
Dumpsters For Own Work	Incl w/ Schmitt	Incl	Incl	Incl	Incl	Incl	
Exterior Gyp Sheathing	Incl w/ Schmitt	Incl	Incl	Incl	Incl	Incl	
Rigid Insulation	Incl w/ Schmitt	Incl	-	Incl	-	Incl	
Fiber Cement Panels	Incl w/ Schmitt	Incl	Incl	Incl	Incl	Incl	
Field Welding Own Work	Incl w/ Schmitt	Incl	Incl	Incl	Incl	Incl	
Hard Lid Ceilings	Incl w/ Schmitt	Incl	Incl	Incl	Incl	Incl	
Joint Firestopping (As Applies)	Incl w/ Schmitt	Incl	Incl	Incl	Incl	Incl	
Joint Sealants (As Applies)	Incl w/ Schmitt	Incl	Incl	Incl	Incl	Incl	
Mech Unit Platform	Incl w/ Schmitt	Incl	Incl	Incl	Incl	Incl	
Hat Channel For Tectum Panels	57,540	57,540	-	-	-	-	
Mockup	Incl w/ Schmitt	Incl	Incl	Incl	Incl	Incl	
Building J Acoustic Wall	23,253	23,253	Incl	-	-	Incl	
Plaster Total	Incl w/ Schmitt	Incl	Incl	Incl	Incl	Incl	
Cement Plaster W/ Metal Lath	Incl w/ Schmitt	Incl	Incl	Incl	Incl	Incl	
Weather Barrier	Incl w/ Schmitt	Incl	Incl	Incl	Incl	Incl	
FRP	2,748	-	-	-	-	-	
Access Panels	6,489	-	Incl	-	-	-	
Total	1,099,006						

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Bid Analysis
RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Tile		Continental	Inl
Scope Items	Total		
Tile Total	36,678	36,678	
Isolation Membrane	Incl w/ Continental	Incl	
Mortar Bed	Incl w/ Continental	Incl	
Stone Threshold	Incl w/ Continental	Incl	
Tiling @ Restrooms W/ Accent Panel	Incl w/ Continental	Incl	
Total		36,678	

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Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Acoustical Ceilings		AcousticWorks **	S
Scope Items	Total		
Acoustic Ceilings Total	357,925	357,925	
Tectum Panels	Incl w/ AcousticWorks	Incl	
2X4 Acoustical Ceiling Panels	Incl w/ AcousticWorks	Incl	
4X4 Acoustical Ceiling Panels	Incl w/ AcousticWorks	Incl	
4X4 Direct Applied Acoustical Ceiling	Incl w/ AcousticWorks	Incl	
Total	357,925		

** Incomplete Bid

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Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Flooring & Wood Flooring		Continental	Pro Flooring	Geary Floors
Scope Items	Total			
Flooring Total	72,809	72,809	-	-
Carpet	Incl w/ Continental	Incl	-	-
Vct	Incl w/ Continental	Incl	-	-
Resilient Base	Incl w/ Continental	Incl	-	-
Polished Concrete	Incl w/ Continental	Incl	-	-
Sealed Concrete	Incl w/ Continental	Incl	-	-
Walk Off Mats	Incl w/ Continental	Incl	-	-
Wood Flooring Total	341,100	-	341,100	357,204
Center Logo	Incl w/ Pro Flooring	-	Incl	Incl
Isolation Membrane @ Gym Flooring	Incl w/ Pro Flooring	-	Incl	Incl
Resilient Wood Flooring @ Gym	Incl w/ Pro Flooring	-	Incl	Incl
Resilient Wood Flooring @ Stage	Incl w/ Pro Flooring	-	Incl	Incl
Vented Base @ Wood Flooring	Incl w/ Pro Flooring	-	Incl	Incl
Mockups	2,000	-	-	-
Temporary Floor Protection	17,852	-	-	-
Temporary Climate Control	15,086	-	-	-
Grind & Level Concrete	48,478	-	-	-
Total	495,325			

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Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Painting		FAS	Affinity
Scope Items	Total		
Painting Total	121,380	121,380	176,669
Anti Graffiti Coating	Incl w/ FAS	Incl	Incl
Building J Exterior Plaster Accent Painting	Incl w/ FAS	Incl	Incl
Mockup	Incl w/ FAS	Incl	Incl
Paint Bollards	Incl w/ FAS	Incl	Incl
Paint Touch Ups	Incl w/ FAS	Incl	Incl
Seal Exposed Concrete Masonry	Incl w/ FAS	Incl	Incl
Water Repellant @ Vertical Concrete & Masonry	Incl w/ FAS	Incl	Incl
Total	121,380		

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Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Signage		Architectural Sign Identity	A Good Sign
Scope Items	Total		
Building Signage	33,484	33,484	37,250
Building Signage	Incl w/ ASI	Incl	Incl
Exit Signs	Incl w/ ASI	Incl	Incl
Illuminated Dimensional Lettering	Incl w/ ASI	Incl	Incl
Installation	Incl w/ ASI	Incl	Incl
Occupancy Signs	Incl w/ ASI	Incl	Incl
Restroom Signage	Incl w/ ASI	Incl	Incl
Signage @ Building H	Incl w/ ASI	Incl	Incl
Signage @ Building J	Incl w/ ASI	Incl	Incl
Total	33,484		

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Bid Analysis
RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Window Treatments		Sheward	Diversified
Scope Items	Total		
Window Treatments Total	31,496	31,496	32,664
Building H	Incl w/ Sheward	Incl	Incl
Building J	Incl w/ Sheward	Incl	Incl
Total			
	31,496		

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Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Wheelchair Lifts		McKinley	
Scope Items	Total		
Wheelchair Lifts	145,728	145,728	
Wheelchair Lift To Control Room	Incl w/ EHCC	incl	
Wheelchair Lift To Stage	Incl w/ EHCC	incl	
Total	145,728		

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Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Toilet Accessories, Operable Partitions & Fire Extinguishers		Choice Builders	DLG	Platinum	Advanced Equipment *	Inland Building *	L2
Scope Items	Total						
Toilet Partitions & Accessories Total	30,140	30,140	35,200	-	-	-	
Fire Extinguishers	Incl w/ Choice	Incl	Incl	-	-	-	
Grab Bars	Incl w/ Choice	Incl	Incl	-	-	-	
Mirrors	Incl w/ Choice	Incl	Incl	-	-	-	
Paper Towel Dispensers, Surface Mounted	Incl w/ Choice	Incl	Incl	-	-	-	
Sanitary Napkin Disposals, Surface Mounted	Incl w/ Choice	Incl	Incl	-	-	-	
Soap Dispensers	Incl w/ Choice	Incl	Incl	-	-	-	
Toilet Accessories	Incl w/ Choice	Incl	Incl	-	-	-	
Toilet Paper Dispensers	Incl w/ Choice	Incl	Incl	-	-	-	
Toilet Partitions	Incl w/ Choice	Incl	Incl	-	-	-	
Toilet Seat Cover Dispensers, Surface Mounted	Incl w/ Choice	Incl	Incl	-	-	-	
Waste Receptacles, Recessed	Incl w/ Choice	Incl	Incl	-	-	-	
Display Case	14,033	-	-	14,033	-	-	
Operable Partitions Total	64,803	-	-	-	47,800	59,876	
Cubicle Curtain & Track	893	-	-	-	-	-	
Total	109,869						

* - Not Per Specifications

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Bid Analysis
RANCHO STARBUCK PAC/GYM BUILDING
 Bid Date: June 19, 2025

Athletic Equipment, Theater and Stage Equipment, Lockers & Marquees		Gary Raub **	Protech	Wenger	ADP Lemco	Sierra **	Herk Edwards	Broc
Scope Items	Total							
Theater And Stage Equipment Total	846,830	762,860	846,830	-	-	-	-	-
Gym Acoustical Curtains	Incl w/ Protech	Incl	Incl	-	-	-	-	-
Pipe Grid System	Incl w/ Protech	Incl	Incl	-	-	-	-	-
Wenger Acoustical Wall Panels	32,820	-	-	32,820	-	-	-	-
Wenger Musical Instrument Storage Cabinets	90,484	-	-	90,484	-	-	-	-
Ballet Barres	7,900	-	-	-	7,900	-	-	-
Hussey Bleachers	140,898	-	-	-	-	114,768	140,898	-
Indoor Scoreboard	117,874	-	-	-	138,116	-	-	117,874
Scoring Console	Incl w/ Broc	-	-	-	Incl	-	-	Incl
Shot Clocks	Incl w/ Broc	-	-	-	Incl	-	-	Incl
Suspended Basketball Hoops	Incl w/ Broc	-	-	-	Incl	-	-	Incl
Volleyball Post Floor Inserts & Systems	Incl w/ Broc	-	-	-	Incl	-	-	Incl
Wall Padding	Incl w/ Broc	-	-	-	Incl	-	-	Incl
Lockers	10,829	-	-	-	-	-	-	-
Accessible Benches	Incl w/ ATM	-	-	-	-	-	-	-
Total	1,246,198							

** Not specified

** Not specified

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Bid Analysis
RANCHO STARBUCK PAC/GYM BUILDING
Bid Date: June 19, 2025

Fire Sprinklers		RLH	Serenity
Scope Items	Total		
Fire Sprinklers	152,490	152,490	167,963
Building H Fire Suppression	Incl w/ RLH	Incl	Incl
Bim Participation	Incl w/ RLH	Incl	Incl
Total		152,490	

Confidential Proprietary Pricing Information of Erickson-Hall - not to be released as a Public Record

Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025

Plumbing & Site Utilities		Ranbar	Interpipe	ACCO	MPI	Fischer Inc.	City Commercial	Post Bros.
Scope Items	Total							
Building Plumbing	1,304,920	1,304,920	1,383,838	1,901,850	2,136,805	3,062,320	582,130	-
Access Panels For Own Trade	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Bim Participation	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Condensate Drain Piping	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Electric Water Heaters	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Fire Riser 5' Out To 12" Aft @ Modular & Gym/Pac	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Floor Drains	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Gas Water Heater	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Hi-Lo Drinking Fountains	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Hot Water Return Pump	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Mockup	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Modular Building Final Connections	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Mop Sink	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Plumbing Fixtures	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Roof Drains	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Roof Overflows	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Service Sink	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Sinks	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Toilets	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Urinals	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	Incl	-
Site Utilities Total	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	-	853,457
Cap Existing Sewer Lines	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	-	Incl
Cap Existing Storm Drains (And Grate Inlet Where Necessary)	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	-	Incl
Cap Site Water Lines And Valves	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	-	Incl
Site Fire Water	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	-	Incl
Domestic Water	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	-	Incl
Sanitary Sewer	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	-	Incl
Storm Drain	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	-	Incl
Spalls Quantity (Cy)	Incl w/ Ranbar	Incl	Incl	Incl	Incl	Incl	-	-
Stubup For 2" Water Supply For Grading	Incl w/ Ranbar	Incl	Incl	-	Incl	Incl	-	Incl
Upgrade Gas Meter As Necessary	Incl w/ Ranbar	Incl	Incl	-	Incl	Incl	-	-
Fine Sweeps @ H & J	Incl w/ Ranbar	Incl	Incl	-	Incl	Incl	-	-
Perf Drain @ Retaining Wall (D6A - 23/A008)	15,000	15,000	30,300	-	-	-	-	-
Plumbing/Utility Spalls	79,950	-	-	-	-	-	-	-
Alterations to fix fields from storm drain connection	14,887	-	-	-	-	-	-	-
Trench Patch @ Street & Sidewalk	42,568	-	-	-	-	-	-	-
Total	1,457,165							

Confidential Proprietary Pricing Information of Erickson-Hall - not to be released as a Public Record

Bid Analysis
RANCHO STARBUCK PAC/GYM BUILDING
 Bid Date: June 19, 2025

HVAC		ACH	SIMCO	West-Tech	Couts	West
Scope Items	Total					
Hvac Total	712,448	712,448	728,790	729,300	874,109	74
Craning & Rigging As Required	Incl w/ ACH	Incl	Incl	Incl	Incl	
Furnish & Install 4 Duct Silencers	Incl w/ ACH	Incl	Incl	Incl	Incl	
Furnish & Install 9 Exhaust Fans	Incl w/ ACH	Incl	Incl	Incl	Incl	
Furnish & Install Air Distribution	Incl w/ ACH	Incl	Incl	Incl	Incl	
Furnish & Install Hvac Controls	Incl w/ ACH	Incl	Incl	Incl	Incl	
Furnish & Install Hvac Insulation	Incl w/ ACH	Incl	Incl	Incl	Incl	
Furnish & Install Roof Top Duct Support	Incl w/ ACH	Incl	Incl	Incl	Incl	
Furnish & Install Seismic Restraints & Isolation	Incl w/ ACH	Incl	Incl	Incl	Incl	
Start Up & Warranty	Incl w/ ACH	Incl	Incl	Incl	Incl	
Test & Balance	Incl w/ ACH	Incl	Incl	Incl	Incl	
Bim Participation	Incl w/ ACH	Incl	Incl	Incl	Incl	
Controls Wiring	Incl w/ ACH	Incl	Incl	Incl	Incl	
Ductwork & Registers	Incl w/ ACH	Incl	Incl	Incl	Incl	
Furnish & Install 1 Split Vent Ac Unit	Incl w/ ACH	Incl	Incl	Incl	Incl	
Furnish & Install 9 Roof Curbs	Incl w/ ACH	Incl	Incl	Incl	Incl	
Furnish & Install 9 Rtu Units	Incl w/ ACH	Incl	Incl	Incl	Incl	
Furnish & Install Refrigeration Piping	Incl w/ ACH	Incl	Incl	Incl	Incl	
Hvac Controls Conduits/controls Wiring	Incl w/ ACH	Incl	Incl	Incl	Incl	
Testing, Adjusting, And Balancing	Incl w/ ACH	Incl	Incl	Incl	Incl	
Mechanical Duct Supports	66,253	-	-	-	-	
Total	778,701					

Confidential Proprietary Pricing Information of Erickson-Hall - not to be released as a Public Record

Bid Analysis
RANCHO STARBUCK PAC/GYM BUILDING
 Bid Date: June 19, 2025

Electrical, Communications, Fire Alarm & Audio-Visual Equipment		RDM	Circle City *	Rancho Pacific	Champion	Telenet VOIP	ICS	Keen	Emcor	DCI
Scope Items	Total									
Electrical Total	3,478,448	3,478,448	3,174,644	3,983,300	4,008,880	-	-	-	-	-
Bim Participation	Incl w/ RDM	Incl	Incl	Incl	Incl	-	-	-	-	-
Pathways For Low Voltage	Incl w/ RDM	Incl	Incl	Incl	Incl	-	-	-	-	-
Pullboxes	Incl w/ RDM	Incl	Incl	Incl	Incl	-	-	-	-	-
Site Distribution	Incl w/ RDM	Incl	Incl	Incl	Incl	-	-	-	-	-
Site Light Poles	Incl w/ RDM	Incl	Incl	Incl	Incl	-	-	-	-	-
Hvac Controls Conduit	Incl w/ RDM	Incl	Incl	Incl	Incl	-	-	-	-	-
Splice Quantity (Cy)	Incl w/ RDM	Incl	Incl	Incl	Incl	-	-	-	-	-
Communications Total	Incl w/ RDM	Incl	Incl	-	-	763,980	728,198	-	-	-
Assistive Listening Devices	Incl w/ RDM	Incl	Incl	Incl	Incl	-	Incl	-	-	-
Extron System	Incl w/ RDM	Incl	Incl	Incl	Incl	Incl	Incl	-	-	-
Intercom System	Incl w/ RDM	Incl	Incl	Incl	Incl	Incl	Incl	-	-	-
Projection Screen	Incl w/ RDM	Incl	Incl	Incl	Incl	-	Incl	-	-	-
Sound Equipment Rack	Incl w/ RDM	Incl	Incl	Incl	Incl	Incl	Incl	-	-	-
Audio-Visual Equipment	Incl w/ RDM	Incl	Incl	Incl	Incl	-	Incl	-	-	-
Fire Alarm	Incl w/ RDM	Incl	Incl	Incl	Incl	Incl	Incl	-	-	-
Fire Alarm Building H	Incl w/ RDM	Incl	Incl	Incl	Incl	Incl	Incl	-	-	-
Fire Alarm Building J	Incl w/ RDM	Incl	Incl	Incl	Incl	Incl	Incl	-	-	-
PV Panels	272,780	272,780	353,198	-	-	-	-	468,108	782,384	-
PV Structure	88,144	-	-	-	-	-	-	Incl	Incl	-
PV Footings	28,967	-	-	-	-	-	-	Incl	Incl	-
PV Light Gauge Framing	88,144	-	-	-	-	-	-	Incl	Incl	-
Temp Power	Incl w/ RDM	Incl	-	Incl	Incl	-	-	-	-	-
Allowance: Bid Spread	0	-	-	-	-	-	-	-	-	-
Total	3,867,335									

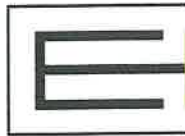
* Incomplete Stage Lighting Scope

Confidential Proprietary Pricing Information of Erickson-Hall - not to be released as a Public Record

Bid Analysis

RANCHO STARBUCK PAC/GYM BUILDING

Bid Date: June 19, 2025



Erickson-Hall
An Employee Ow

Site Specific Conditions & Traffic Control	
Scope Items	Total
Traffic Control	32,652
Repair of our laydown & relo staging areas	49,684
Gravel Access Road Install & Removal	96,398
Pre-Con - Internet/Starlink - Room 30	10,000
Pre-Con - Ricoh Printer - Room 30	2,500
Temp Fence	22,796
Daily Cleanup	48,960
Dust Control	16,354
Security Cameras	52,325
Total	331,66

Confidential Proprietary Pricing Information of Erickson-Hall - not to be released as a Public Record

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of a Variable Term Waiver for Melissa
Lozano Assigned to be a Speech Language
Pathologist Teacher for Lowell Joint School District
for the 2025/2026 School Year

ACTION

The Lowell Joint School District is experiencing difficulty hiring fully credentialed teachers with the skills necessary to be successful in the classroom. All candidates have been screened, in addition, Variable Term Waivers are also supported by site administrators.

It is recommended that Lowell Joint School District approve a Variable Term Waiver for Melissa Lozano, who is assigned to be Speech Language Pathologist for the Lowell Joint School District for the 2025/2026 school year be approved, and that the Superintendent or designee be authorized to execute the necessary documents.

Superintendent's Comment:

APPROVAL RECOMMENDED.

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval to Utilize San Gabriel Valley Food Services Cooperative Purchasing Group School Districts/Agency Bids for Food and Supplies for the 2025/26 School Year ACTION

As a member district of the San Gabriel Valley Food Services Cooperative Purchasing Group (SGV Co-Op), office of Food and Nutrition Services requests to use bids which other school districts or agencies have performed all legal advertising costs and timely bid processing procedures on behalf of the SGV Co-Op member districts. Pursuant to Title 7, *CFR*, Parts 3016.36, School Food Authorities (SFAs) may utilize provisions to conduct procurements in a competitive manner. Education Code Section 39644 authorizes school districts to renew competitive bids for supplies for two additional years beyond the base issue and to renew competitive bids for service and equipment for four additional years beyond the base year. The SGV Co-Op consists of 30 school districts, of which Lowell Joint School District is included. Bids for food and supplies are:

<u>Product</u>	<u>Bid Number</u>	<u>Issuing District/Agency</u>	<u>Awarded Vendor</u>	<u>Effective Dates</u>
Bread Items	RFP # 22-23-01-01	Azusa USD	Galasso's and GoldStar Bread	7/1/25 – 6/30/26
Milk and Dairy	Bid # 2022-23.RFP02	Hacienda, La Puente USD	Driftwood Dairy	7/1/25 – 6/30/26
Frozen Foods	RFP # 0224-22/23	Rosemead USD	GoldStar	7/1/25 – 6/30/26
Produce	RFP # FSO301:23-24	Duarte USD	GoldStar	7/1/25 – 6/30/26
Pizza	RFP #04:2425	West Covina USD	Pizza Hut, Domino's, Papa Johns	7/1/25 – 6/30/26
Grocery	RFP # 001-25/26	Walnut Valley USD	GoldStar	7/1/25 – 6/30/26
Paper, Plastic, and Film	RFP # 22-23-107	Covina Valley USD	P&R, Platinum Packaging, Forms Plastic	7/1/25 – 6/30/26

Superintendent's Comment:

APPROVAL RECOMMENDED.

It is recommended that the Board of Trustees approve the utilization of other agency's bids for Districtwide Nutrition Services products for the 2025/26 school year be approved, and that the Superintendent or designee be authorized to execute the necessary documents.

Superintendent's Comment:

APPROVAL RECOMMENDED.

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Memorandum of Understanding Between
Lowell Joint School District and California State
University, East Bay Student Teaching Agreement,
effective July 1, 2025 through June 30, 2030

ACTION/
(RATIFICATION)

The purpose of this agreement is to provide student teacher placements, be effective July 1, 2025 through June 30, 2030 at no cost to the district, unless terminated sooner.

This agreement may be terminated at any time by written mutual agreement or upon 30 days' advance written notice by one party to the other, PROVIDED, HOWEVER, that in no event shall said Termination take effect with respect to any Student Teacher. In the event that the Termination of this Agreement affects any active Student Teacher placement, such Student Teacher shall be permitted to complete training for any semester in which Termination would otherwise occur. Performance under the agreement shall be reviewed annually, and the parties may agree to annual extensions after expiration of the initial term.

It is recommended that the Memorandum of Understanding between California State University of East Bay and Lowell Joint School District for the period of July 1, 2025 through June 30, 2030 be approved, and that the Superintendent or designee be authorized to execute the necessary documents.

Superintendent's Comment:

APPROVAL RECOMMENDED.

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Agreement with Administrative Services Cooperative, Inc. for Student Transportation Services for the 2025/2026 School Year Not to Exceed \$150,000 ACTION/
(RATIFICATION)

A bid for transportation service for our special education student was awarded to Administrative Services Cooperative, Inc. beginning with the 2025/2026 school year. This bid is renewable annually for up to five years.

The contract would cover the period of July 1, 2025 through August 2026. It is recommended to approve this contract for a not to exceed amount of \$150,000. This fee includes extended school year (ESY) transportation.

It is recommended that the agreement with Administrative Services Cooperative, Inc. for Student Transportation Services for the 2025-2026 School Year not to exceed \$150,000 be approved and that the Superintendent or designee be authorized to execute the agreement.

Superintendent's Comment:

APPROVAL RECOMMENDED.

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Independent Contract with Dr. Doug
Stephey OD MS to provide a Developmental Vision
Assessment for the 2025/2026 School Year

ACTION/
(RATIFICATION)

Arrangements have been made with Dr. Doug Stephey OD MS, during the 2025/2026 school year, to conduct a Developmental Vision Assessment for a district student. A District contracts with an Independent Consultant when it does not have staff available to meet the service requirements documented in a student's Individual Education Plan (IEP).

The contract would cover the period of July 1, 2025 through June 30, 2026. Services will be rendered at a total fee not to exceed One Thousand, Eight Hundred Dollars (\$1,800.00).

It is recommended that the independent consultant agreement with Dr. Doug Stephey OD MS to provide a Developmental Vision Assessment for the 2025/2026 School Year be approved, for an estimated cost not to exceed \$1,800.00, and that the Superintendent or designee be authorized to execute the agreement.

Superintendent's Comment:

APPROVAL RECOMMENDED.

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Independent Contract with Dr. Fabian of
Synapse Advance Audiology Inc. to provide a Central ACTION/
Auditory Processing Disorder Evaluation for the (RATIFICATION)
2025/2026 School Year

Arrangements have been made with Dr. Fabian of Synapse Advance Audiology Inc. Audiology, during the 2025/2026 school year, to conduct a Central Auditory Processing Disorder Evaluation for a district student. A District contracts with an Independent Consultant when it does not have staff available to meet the service requirements documented in a student's Individual Education Plan (IEP).

The contract would cover the period of July 1, 2025 through June 30, 2026. Services will be rendered at a total fee not to exceed One Thousand, Nine Hundred Dollars (\$1,900.00).

It is recommended that the independent consultant agreement with Dr. Fabian of Synapse Advance Audiology Inc. to provide a Central Auditory Processing Disorder Evaluation for the 2025/2026 School Year be approved, for an estimated cost not to exceed \$1,900.00, and that the Superintendent or designee be authorized to execute the agreement.

Superintendent's Comment:

APPROVAL RECOMMENDED.

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Independent Contractor Agreement with Katelyn Allsman, to provide a BCBA Services, for the 2025-2026 School Year ACTION/
(RATIFICATION)

Arrangements have been made with Katelyn Allsman, during the 2025/2026 school year, to provide BCBA services for a district student. A District contracts with an Independent Consultant when it does not have staff available to meet the service requirements documented in a student's Individual Education Plan (IEP).

The contract would cover the period of July 1, 2025 through June 30, 2026. The total fee for services rendered is not to exceed One Hundred and Ten Thousand Dollars (\$110,000.00), to be **paid for with CYBHI Funds**.

It is recommended that the Independent Contractor Agreement with Katelyn Allsman to provide BCBA services for the 2025/2026 School Year be approved, cost not to exceed \$110,000.00, to be paid for with CYBHI Funds and that the Superintendent or designee be authorized to execute the agreement.

Superintendent's Comment:

APPROVAL RECOMMENDED.

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Memorandum of Understanding
(MOU) Between Lowell Joint School District and
California Southern University, Inc. for the
2025/2026 School Year

ACTION/
(RATIFICATION)

The purpose of this agreement is to provide the supervised training required for students of *California Southern University, Inc.* enrolled in the certificate program to meet the experience and supervision requirements as defined by the laws and regulations as stipulated by the California Board of Behavioral Sciences (BBS) for Marriage and Family Therapist (MFT) and/or Professional Clinical Counselor (PCC) practicum Students and is within the scope of practice for the professions.

California Southern University will serve as a liaison to Practicum Site for Students placed with Practicum Site. Students will have an assigned University faculty practicum instructor who will be available to Practicum Site to discuss Students' progress at Practicum site. Lowell Joint School District will provide direct supervision by a Psychologist to the *California Southern University* student.

This MOU will be effective July 1, 2025 through June 30, 2026 at no cost to the district.

It is recommended that the MOU with *California Southern University, Inc.* and Lowell Joint School District for the 2025/2026 school year be approved, and that the Superintendent or designee be authorized to execute the necessary documents.

Superintendent's Comment:

APPROVAL RECOMMENDED.

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Independent Contract with Darlene Hanson,
SLP of Kindred Speech and Language Inc. to provide a
AAC/AT IEE for the 2025/2026 School Year

ACTION/
(RATIFICATION)

Arrangements have been made with Darlene Hanson, SLP of Kindred Speech and Language Inc. to perform an Independent Education Evaluation (IEE), during the 2025/2026 school year, to conduct a AAC/AT assessment for a district student. A District contracts with an Independent Consultant when it does not have staff available to meet the service requirements documented in a student's Individual Education Plan (IEP).

The contract would cover the period of July 1, 2025 through June 30, 2026. Services will be rendered at a total fee not to exceed Two Thousand, Five Hundred Dollars (\$2,500.00).

It is recommended that the independent consultant agreement with Darlene Hanson, SLP of Kindred Speech and Language Inc. to perform an Independent Education Evaluation (IEE), for the 2025/2026 School Year be approved, for an estimated cost not to exceed \$2,500.00, and that the Superintendent or designee be authorized to execute the agreement.

Superintendent's Comment:

APPROVAL RECOMMENDED.

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees
From: Jim Coombs, Superintendent of Schools
Subject: Purchase Order Report 2025/2026 #1

ACTION/
(RATIFICATION)

In accordance with the law, Purchase Order Report 2025/2026 #1 is recommended for approval. The report lists all purchase orders issued June 1, 2025 through June 30, 2025.

DB: ds

Superintendent's Comment:

APPROVAL RECOMMENDED.

X-B1-1

LOWELL JOINT SD

PURCHASE ORDER DETAIL REPORT

BOARD OF TRUSTEES MEETING 08/04/2025

FROM 06/01/2025 TO 06/30/2025

PO NUMBER	VENDOR	PO TOTAL	ACCOUNT AMOUNT	ACCOUNT NUMBER	PSEUDO / OBJECT DESCRIPTION
U99B0041	ALL AMERICAN INSPECTION INC.	23,400.00	23,400.00	4000220001 6281	Measure P Bond - El Portal / Inspector of Record
U99B0042	ALL AMERICAN INSPECTION INC.	40,300.00	40,300.00	4000220007 6281	Measure P Bond - RS / Inspector of Record
U99B0043	KING OFFICE SERVICES	15,000.00	15,000.00	4000220001 6282	Measure P Bond - El Portal / Consultant/Contractor
U99B0044	NIGRO & NIGRO	7,500.00	7,500.00	4000210003 5821	Fund 40-Bond Exp/Centralized / Audit
U99B0047	NIGRO & NIGRO	8,000.00	8,000.00	4000220008 5821	Measure P Bond - District / Audit
U99B0048	FORMA + SCORPIO INC	11,718,440.79	11,718,440.79	4000220001 6230	Measure P Bond - El Portal / Construction
U99F0131	GOODMAN TREE SERVICE	5,062.50	5,062.50	0191000005 5800	CalFireGrant-DistrictWide / Prof/ConsultingServ&Oper I
U99F0132	F.M. THOMAS AIR CONDITIONING	2,500.00	2,500.00	0181500042 5630	RRMA-District Office / Repairs or Maintenance
U99F0133	IMAGE APPAREL FOR BUSINESS	42.00	42.00	0100000098 5895	GF-Unrest-Not Applicable / Uniforms
U99I0003	JENNIFER KINKEL	1,000.00	1,000.00	0109020004 5850	ImpactQualStrt-EarlyLearning / Conslt/Ind
U99M0612	AMERICAN EXPRESS	528.18	528.18	0100000317 4300	GF_UNRESTRICTED_SUPT / Materials and Supplies
U99M0613	AMERICAN EXPRESS	140.00	140.00	0100000317 4300	GF_UNRESTRICTED_SUPT / Materials and Supplies
U99M0614	AMERICAN EXPRESS	27,000.00	27,000.00	0191000003 6400	CalFireGrant-Jordan / Equipment
U99M0615	AMERICAN EXPRESS	40,000.00	40,000.00	0191000004 6400	CalFireGrant-Macy / Equipment
U99M0616	AMERICAN EXPRESS	500.00	500.00	0170290002 5200	KIT/NS Training / Travel and Conferences
U99M0617	AMERICAN EXPRESS	2,000.00	2,000.00	0170290002 5200	KIT/NS Training / Travel and Conferences
U99M0618	AMERICAN EXPRESS	38,930.33	38,930.33	0191000004 6400	CalFireGrant-Macy / Equipment
U99M0619	AMERICAN EXPRESS	27,045.04	27,045.04	0191000003 6400	CalFireGrant-Jordan / Equipment
U99R0659	TRINIDAD, GINA	1,517.04	1,517.04	0105110063 4300	RS Site/Graduation / Materials and Supplies
U99R0660	AMAZON CAPITAL SERVICES	219.33	219.33	0100000071 4300	GF-Unrest-Not Applicable / Materials and Supplies
U99R0661	CERTIFIED TRANSPORTATION SERVI	4,968.00	648.00	0105110044 4300	GF-SiteAlloc RS / Materials and Supplies
			4,320.00	0109110014 5800	GF-DonRS / Prof/ConsultingServ&Oper Exp
U99R0662	COLLEGE BOARD	1,322.00	1,322.00	0105110044 4300	GF-SiteAlloc RS / Materials and Supplies
U99R0663	GOODMAN TREE SERVICE	59,695.00	59,695.00	0191000002 6170	CalFirePSPlygrdGrt-MYB / Land Improvements
U99R0664	OCDE	3,450.00	3,450.00	0108880020 5800	GF-Technology-Not Applicable / Prof/ConsultingServ&C
U99R0665	HOUGHTON MIFFLIN HARCOURT	62,726.58	62,726.58	0163000002 4130	GF-Lottery-Not Applicable / Textbooks

LOWELL JOINT SD

PURCHASE ORDER DETAIL REPORT

BOARD OF TRUSTEES MEETING 08/04/2025

FROM 06/01/2025 TO 06/30/2025

<u>PO NUMBER</u>	<u>VENDOR</u>	<u>PO TOTAL</u>	<u>ACCOUNT AMOUNT</u>	<u>ACCOUNT NUMBER</u>	<u>PSEUDO / OBJECT DESCRIPTION</u>
U99R0666	AMAZON CAPITAL SERVICES	129.25	129.25	0100000317 4300	GF_UNRESTRICTED_SUPT / Materials and Supplies
U99R0667	SCHOOL NUTRITION ASSOCIATION	825.00	825.00	0170290002 5200	KIT/NS Training / Travel and Conferences
U99R0668	SAN JOAQUIN COUNTY OFFICE OF E	4,000.00	4,000.00	0195640012 5800	MedCal/SpEd / Prof/ConsultingServ&Oper Exp
U99R0669	U.S. BANK	250.00	250.00	0100000133 5800	GF-Unrest-Not Applicable / Prof/ConsultingServ&Oper I
U99R0670	AMAZON CAPITAL SERVICES	683.06	683.06	0100000009 4300	GF-Unrest-Not Applicable / Materials and Supplies
U99R0671	EDUCATORS COOPERATIVE	15,000.00	15,000.00	0191020001 5800	CareerConnectPD / Prof/ConsultingServ&Oper Exp
U99R0672	AVANTIS EDUCATION INC	1,999.00	1,999.00	0141270034 5810	TitleIV-GATE / Licenses/Technology
U99R0673	OCDE	3,000.00	3,000.00	0162660014 5800	EdEffect/MathPD / Prof/ConsultingServ&Oper Exp
Fund 01 Total:		304,532.31			
Fund 40 Total:		11,812,640.79			
Total Amount of Purchase Orders:		12,117,173.10			

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Consolidated Check Register Listing Report
2025/2026 #1

ACTION/
(RATIFICATION)

The Consolidated Check Register Listing Report 2025/26 #1 is recommended for approval. The Consolidated Check Register lists all warrants issued June 1, 2025 through June 30, 2025.

DB/ds

Superintendent's Comment:

APPROVAL RECOMMENDED.

X-B2-1

LOWELL JOINT SD
Consolidated Check Register
from 6/1/2025 to 6/30/2025

Check	Payee ID	Payee Name	Reference	Subs	Check Date	Cancel Date	Type	Status	Check Amount
99 00008737	E9900004	ALAN MAO	05212025A	OH	06/03/2025		MW	IS	157.77
99 00008738	V9903842	AMAZON CAPITAL SERVICES	1PPH-19YN-3DTR	OH	06/03/2025		MW	IS	397.20
99 00008739	E9900026	BARBARA CASTILLO	05152025	OH	06/03/2025		MW	IS	39.08
99 00008740	U9900001	CITY OF LA HABRA WATER DEPARTM	041025051125	OH	06/03/2025		MW	IS	5,028.20
99 00008741	F9900023	DANIELS TIRE SERVICE INC.	140118565	OH	06/03/2025		MW	IS	658.27
99 00008742	V9903531	DAVIS, SUMMER	029	OH	06/03/2025		MW	IS	1,827.00
99 00008743	V9900055	DEAD AND BURIED INC.	84867	OH	06/03/2025		MW	IS	585.65
99 00008744	V9900057	Demco Inc	7644893	OH	06/03/2025		MW	IS	57.15
99 00008745	F9900031	F.M. THOMAS AIR CONDITIONING	48096	OH	06/03/2025		MW	IS	1,136.00
99 00008746	V9900077	FULLERTON SCHOOL DISTRICT	22U11083	OH	06/03/2025		MW	IS	245.00
99 00008747	V9903673	GOODMAN TREE SERVICE	05232025	OH	06/03/2025		MW	IS	900.00
99 00008748	V9900080	GOPHER	IN447570	OH	06/03/2025		MW	IS	2,594.95
99 00008749	V9900088	IMPERIAL BAND INSTRUMENTS INC	M95931	OH	06/03/2025		MW	IS	853.66
99 00008750	V9900094	J.W.PEPPER & SON INC.	367124883	OH	06/03/2025		MW	IS	38.33
99 00008751	V9903875	JASON DOSS	7003	OH	06/03/2025		MW	IS	225.00
99 00008752	E9900084	JIM COOMBS	05272025	OH	06/03/2025		MW	IS	114.42
99 00008753	E9900222	MARY JANE VILLALOVOS	052825	OH	06/03/2025		MW	IS	59.00
99 00008754	V9903412	NATALY BENTON	03242025	OH	06/03/2025		MW	IS	347.96
99 00008755	I9900016	PAUL LUNA / LUNA INK	0826	OH	06/03/2025		MW	IS	700.00
99 00008756	V9903841	PEGLEG ENTERTAINMENT	RSMS-2025001	OH	06/03/2025		MW	IS	4,100.00
99 00008757	F9900053	PEST OPTIONS INC.	463498	OH	06/03/2025		MW	IS	290.00
99 00008758	V9900149	QUADIENT LEASING USA INC.	Q1866467	OH	06/03/2025		MW	IS	511.75
99 00008759	U9900004	SOUTHERN CALIFORNIA EDISON	0422052025DO	OH	06/03/2025		MW	IS	1,433.77
99 00008760	U9900005	SOUTHERN CALIFORNIA GAS CO	0421052025DO	OH	06/03/2025		MW	IS	852.64
99 00008761	V9903257	TAO ROSSINI APC	7734	OH	06/03/2025		MW	IS	285.00
99 00008762	V9903874	THE CERAMIC SHOP	559685	OH	06/03/2025		MW	IS	309.05
99 00008763	I9900011	TRINIDAD, GINA	SUMMER SUMMITOH	OH	06/03/2025		MW	IS	844.53
99 00008764	U9900009	VERIZON WIRELESS-LA	6113671119	OH	06/03/2025		MW	IS	2,419.93
99 00008765	I9903532	LOGAN, BRENNEN	RANCHO 5/14-5/15 OH	OH	06/04/2025		MW	IS	131.25
99 00008766	I9900018	TANA CARMICHAEL	RANCHO	OH	06/04/2025		MW	IS	2,000.00
99 00008767	I9900020	CAMILLE VARGAS	LJYT MAY 17	OH	06/04/2025		MW	IS	225.00
99 00008768	I9903532	LOGAN, BRENNEN	LJYT 5/17	OH	06/04/2025		MW	IS	231.25
99 00008769	V9903300	TECHNICOLOR PRINTING	9829	OH	06/04/2025		MW	IS	11,481.50
99 00008770	I9900011	TRINIDAD, GINA	ELOP SHIRTS	OH	06/04/2025		MW	IS	53.04
99 00008771	F9900007	AUTOZONE	05499213449	OH	06/05/2025		MW	IS	408.56
99 00008772	V9900024	BEARCOM	5894607	OH	06/05/2025		MW	IS	3,218.69
99 00008773	S9990001	BEHAVIOR AND EDUCATION INC	10749948	OH	06/05/2025		MW	IS	10,876.00
99 00008774	V9903398	BENCHMARK EDUCATION COMPANY	566975	OH	06/05/2025		MW	IS	3,754.16
99 00008775	F9900011	BEST LAWNMOWER INC.	113713	OH	06/05/2025		MW	IS	2,695.07

LOWELL JOINT SD
Consolidated Check Register
from 6/1/2025 to 6/30/2025

Check	Payee ID	Payee Name	Reference	Subs	Check Date	Cancel Date	Type	Status	Check Amount
99 00008776	V9900028	BUENA PARK PLAQUE & TROPHY	1057261.0	OH	06/05/2025		MW	IS	244.69
99 00008777	F9900014	BUG FLIP	77213	OH	06/05/2025		MW	IS	2,920.00
99 00008778	V9900056	DELTA DENTAL OF CALIFORNIA	BE006590541	OH	06/05/2025		MW	IS	2,375.10
99 00008779	V9903580	GRAINGER INC	9497562455	OH	06/05/2025		MW	IS	101.25
99 00008780	E9900455	IRMA MOSQUEDA	05292025	OH	06/05/2025		MW	IS	221.40
99 00008781	E9900099	KARI HEINRICH	05232025	OH	06/05/2025		MW	IS	53.86
99 00008782	E9900456	KATHLEEN MONTEMAYOR	05312025	OH	06/05/2025		MW	IS	3.85
99 00008783	E9900107	KENNY HUFF	05142025	OH	06/05/2025		MW	IS	34.46
99 00008784	U9900003	MCI A VERIZON COMPANY	409138955	OH	06/05/2025		MW	IS	4.39
99 00008785	E9900160	PATTY JACOBSEN	05282025	OH	06/05/2025		MW	IS	346.85
99 00008786	F9900054	PLUMBING WHOLESale OUTLET	S100875844.001	OH	06/05/2025		MW	IS	44.47
99 00008787	I9903328	RUSSELL, EILEEN	CONTRACT 02	OH	06/05/2025		MW	IS	294.00
99 00008788	V9900179	SOUTHWEST SCHOOL SUPPLY	6032136696	OH	06/05/2025		MW	IS	657.12
99 00008789	V9900179	SOUTHWEST SCHOOL SUPPLY	6031594675	OH	06/05/2025		MW	IS	391.49
99 00008790	I9900011	TRINIDAD, GINA	014	OH	06/05/2025		MW	IS	1,517.04
99 00008791	V9903860	MAYRA SANCHEZ	053025	OH	06/06/2025		MW	IS	54.60
99 00008792	V9903815	ALL CITY MANAGEMENT SERVICES I	101439	OH	06/11/2025		MW	IS	6,402.60
99 00008793	V9903842	AMAZON CAPITAL SERVICES	1WRC-YCNV-	OH	06/11/2025		MW	IS	1,584.12
99 00008794	V9900048	CSM CONSULTING INC.	19415	OH	06/11/2025		MW	IS	6,587.92
99 00008795	E9900268	GREG WALLACE	051425	OH	06/11/2025		MW	IS	79.48
99 00008796	E9900074	HOLLY BRANDER	H.BRANDER 06/25	OH	06/11/2025		MW	IS	422.76
99 00008797	F9900040	JAMES HARDWARE COMPANY	2505-126670	OH	06/11/2025		MW	IS	52.34
99 00008798	V9903593	NICKOLAS ARTUKOVICH	05012025	OH	06/11/2025		MW	IS	700.00
99 00008799	V9903367	OAK HALL INDUSTRIES L.P.	6076178	OH	06/11/2025		MW	IS	4,543.67
99 00008800	V9900134	OCDE	94UI2616	OH	06/11/2025		MW	IS	377.16
99 00008801	F9900052	PDQ EQUIPMENT RENTAL	882814	OH	06/11/2025		MW	IS	1,187.20
99 00008802	V9903389	PEAP-PRESIDENT'S EDUCATION AWA	607390	OH	06/11/2025		MW	IS	233.47
99 00008803	V9903809	PORTVIEW PREPARATORY INC	26861	OH	06/11/2025		MW	IS	11,578.91
99 00008804	V9903749	PRESENTATION SYSTEMS	66985	OH	06/11/2025		MW	IS	9,590.59
99 00008805	V9903657	REFRIGERATION SUPPLIES DISTRIB	49384246-00	OH	06/11/2025		MW	IS	863.60
99 00008806	U9900004	SOUTHERN CALIFORNIA EDISON	0501053125MAL	OH	06/11/2025		MW	IS	21,017.99
99 00008807	V9903552	SOUTHERN CALIFORNIA SENSORY SC	1281	OH	06/11/2025		MW	IS	812.50
99 00008808	V9900179	SOUTHWEST SCHOOL SUPPLY	6033115892	OH	06/11/2025		MW	IS	4,324.93
99 00008809	V9900179	SOUTHWEST SCHOOL SUPPLY	6031211933	OH	06/11/2025		MW	IS	83.79
99 00008810	U9900006	SUBURBAN WATER SYSTEMS	180052318947	OH	06/11/2025		MW	IS	7,039.48
99 00008811	U9900008	T-MOBILE	0421052025	OH	06/11/2025		MW	IS	140.16
99 00008812	VOID.CONTI	VOID - Continued Sub	CONTINUE	OH	06/11/2025		VM	VD	0.00
99 00008813	F9900059	THE HOME DEPOT PRO INSTITUTION	867076556	OH	06/11/2025		MW	IS	8,186.08
99 00008814	V9900015	APPLE INC.	MB74560793	OH	06/11/2025		MW	IS	2,394.55

LOWELL JOINT SD

Consolidated Check Register

from 6/1/2025 to 6/30/2025

Check	Payee ID	Payee Name	Reference	Subs	Check Date	Cancel Date	Type	Status	Check Amount
99 00008815	E9900139	MARY BRIMMAGE	BOOST CONF 2025	OH	06/11/2025		MW	IS	1,210.67
99 00008816	E9900283	SARAH EBEL	BOOSTCONF 2025	OH	06/11/2025		MW	IS	207.00
99 00008817	V9900179	SOUTHWEST SCHOOL SUPPLY	6031298877	OH	06/11/2025		MW	IS	113.93
99 00008818	E9900475	ALICIA FLORES	05302025	OH	06/12/2025		MW	IS	19.04
99 00008819	V9903842	AMAZON CAPITAL SERVICES	1R7R-QWVY-	OH	06/12/2025		MW	IS	1,018.85
99 00008820	VOID.CONTI	VOID - Continued Stub	CONTINUE	OH	06/12/2025		VM	VD	0.00
99 00008821	V9900013	AMERICAN EXPRESS	XCNV3BP944XP	OH	06/12/2025		MW	RV	89,146.01
99 00008822	V9903623	Certified Transportation Servi	01-196212	OH	06/12/2025		MW	IS	4,968.00
99 00008823	V9900040	COLLEGE BOARD	A262388481	OH	06/12/2025		MW	IS	1,322.00
99 00008824	V9900053	DATA IMPRESSIONS	0028618-IN	OH	06/12/2025		MW	IS	13,005.28
99 00008825	V9903867	FLOWERS BY ROBERT TAYLOR	155354-2	OH	06/12/2025		MW	IS	393.88
99 00008826	V9900104	LEADER SERVICES	CDS 7205	OH	06/12/2025		MW	IS	1,529.67
99 00008827	V9903753	MINDWORKS INNOVATIONS	02182025	OH	06/12/2025		MW	IS	1,030.57
99 00008828	V9900123	MONOPRICE INC.	24526675	OH	06/12/2025		MW	IS	682.61
99 00008829	V9903412	NATALY BENTON	06022025	OH	06/12/2025		MW	IS	186.89
99 00008830	V9900013	AMERICAN EXPRESS	MS0272411227	OH	06/12/2025		MW	IS	7,899.05
99 00008831	F9900029	ENCORP	P25124.L15	OH	06/12/2025		MW	IS	1,360.00
99 00008832	F9900029	ENCORP	P25132.L15	OH	06/12/2025		MW	IS	11,960.00
99 00008833	B9990011	GHATAODE BANNON ARCHITECTS	6064	OH	06/12/2025		MW	IS	25,061.05
99 00008834	B9990012	HANCOCK PARK & DELONG INC	8215	OH	06/12/2025		MW	IS	1,356.25
99 00008835	B9990012	HANCOCK PARK & DELONG INC	8216	OH	06/12/2025		MW	IS	87.50
99 00008836	B9990012	HANCOCK PARK & DELONG INC	8215	OH	06/12/2025		MW	IS	43.75
99 00008837	F9900050	NEW MANAGEMENT INC	7705	OH	06/13/2025		MW	IS	1,508.33
99 00008838	V9900134	OCDE	94UI2468	OH	06/13/2025		MW	IS	3,450.50
99 00008839	F9900052	PDQ EQUIPMENT RENTAL	884044	OH	06/13/2025		MW	IS	1,432.90
99 00008840	F9900053	PEST OPTIONS INC.	463994	OH	06/13/2025		MW	IS	136.49
99 00008841	V9900180	PRIMO BRANDS	05F8710281320	OH	06/13/2025		MW	IS	405.27
99 00008842	U9900004	SOUTHERN CALIFORNIA EDISON	0506060425OL	OH	06/13/2025		MW	IS	4,153.18
99 00008843	V9900179	SOUTHWEST SCHOOL SUPPLY	60331893921	OH	06/13/2025		MW	IS	1,432.73
99 00008844	U9900006	SUBURBAN WATER SYSTEMS	180013638814	OH	06/13/2025		MW	IS	805.17
99 00008845	F9900060	THE SHERWIN-WILLIAMS CO.	2413-7	OH	06/13/2025		MW	IS	1,527.20
99 00008846	V9903850	VISTA HIGHER LEARNING	SI320267	OH	06/13/2025		MW	IS	6,648.54
99 00008847	F9900014	BUG FLIP	MAY 2025	OH	06/13/2025		MW	IS	505.00
99 00008848	N9900015	Continental Sales	MAY 2025	OH	06/13/2025		MW	IS	8,233.00
99 00008849	N9900004	DRIFTWOOD DAIRY	MAY 2025	OH	06/13/2025		MW	IS	11,770.13
99 00008850	N9900016	GAFE PIZZA	MAY 2025	OH	06/13/2025		MW	IS	4,389.00
99 00008851	N9900007	GOLD STAR FOODS	MAY 2025	OH	06/13/2025		MW	IS	34,547.34
99 00008852	V9903711	JP Pizza Inc	MAY 2025	OH	06/13/2025		MW	IS	1,599.00
99 00008853	F9900045	LADY BUGS ENVIRONMENTAL TERMIT	JUNE 2025	OH	06/13/2025		MW	IS	220.00

LOWELL JOINT SD
Consolidated Check Register
from 6/1/2025 to 6/30/2025

Check	Payee ID	Payee Name	Reference	Subs	Check Date	Cancel Date	Type	Status	Check Amount
99 00008854	N9900009	P & R PAPER SUPPLY COMPANY	MAY 2025	OH	06/13/2025		MW	IS	6,156.50
99 00008855	N9900017	SOCAL4 LLC	MAY 2025	OH	06/13/2025		MW	IS	4,683.00
99 00008856	V9903665	SUBWAY	MAY 2025	OH	06/13/2025		MW	IS	2,525.00
99 00008857	V9903842	AMAZON CAPITAL SERVICES	1P6X-KRLV-1XTW	OH	06/16/2025		MW	IS	1,468.55
99 00008858	V9900020	ATKINSON ANDELSON LOYA RUUD &	68730028900045	OH	06/16/2025		MW	IS	597.00
99 00008859	V9903553	CA DEPARTMENT OF JUSTICE	821482	OH	06/16/2025		MW	IS	527.00
99 00008860	F9900015	CANNINGS HARDWARE LA HABRA	402616	OH	06/16/2025		MW	IS	61.88
99 00008861	F9900019	CITY OF LA HABRA	1000081	OH	06/16/2025		MW	IS	2,590.68
99 00008862	E9900057	DENISE CDEBACA	06052025	OH	06/16/2025		MW	IS	44.56
99 00008863	E9900067	ERIC CHITTUM	05162025	OH	06/16/2025		MW	IS	237.50
99 00008864	V9903420	Granite Telecommunications LLC	698874766	OH	06/16/2025		MW	IS	8,021.98
99 00008865	V9900084	HOUGHTON MIFFLIN HARCOURT	956285187	OH	06/16/2025		MW	IS	19,688.58
99 00008866	E9903707	Hutcherson, Angela	05312025	OH	06/16/2025		MW	IS	428.82
99 00008867	V9900087	IMAGE APPAREL FOR BUSINESS	STD INV334636	OH	06/16/2025		MW	IS	1,229.45
99 00008868	V9903878	JENNIFER KINKEL	148	OH	06/16/2025		MW	IS	1,000.00
99 00008869	E9900084	JIM COOMBS	06102025	OH	06/16/2025		MW	IS	397.73
99 00008870	V9903568	LITTLE EARS THERAPY CENTER	016	OH	06/16/2025		MW	IS	240.00
99 00008871	F9900047	LOWES	991671-OYZIYT	OH	06/16/2025		MW	IS	1,026.28
99 00008872	E9900480	MATT MANKIEWICZ	0011	OH	06/16/2025		MW	IS	800.00
99 00008873	E9900160	PATTY JACOBSEN	05052025	OH	06/16/2025		MW	IS	350.00
99 00008874	V9900152	RCF JIM COOMBS	RCF#2857	OH	06/16/2025		MW	IS	2,145.04
99 00008875	E9900174	ROBERT LAUPRECHT	06112025	OH	06/16/2025		MW	IS	20.00
99 00008876	E9900225	SELAH BAUTISTA	06052025	OH	06/16/2025		MW	IS	1,570.63
99 00008877	V9900179	SOUTHWEST SCHOOL SUPPLY	6027824765A	OH	06/16/2025		MW	IS	607.17
99 00008878	V9903787	Boys & Girls Clubs of La Habra	MAY 1-31	OH	06/16/2025		MW	IS	38,609.82
99 00008879	V9900029	BULKBOOK STORE	200778	OH	06/16/2025		MW	IS	223.94
99 00008880	V9903520	JAMPANA ENTERPRISES LLC DBA CO	PS3-05-2425	OH	06/16/2025		MW	IS	18,499.25
99 00008881	F9900019	CITY OF LA HABRA	1000081	OH	06/16/2025		MW	IS	224.21
99 00008882	V9900053	DATA IMPRESSIONS	0028622-IN	OH	06/17/2025		MW	IS	21,541.85
99 00008883	F9900031	F.M. THOMAS AIR CONDITIONING	48133	OH	06/17/2025		MW	IS	4,864.00
99 00008884	F9900033	GLASBY MAINTENANCE SUPPLY	352143A	OH	06/17/2025		MW	IS	18,787.39
99 00008885	V9903673	GOODMAN TREE SERVICE	05292025	OH	06/17/2025		MW	IS	59,695.00
99 00008886	U9900004	SOUTHERN CALIFORNIA EDISON	0509060925MA	OH	06/17/2025		MW	IS	4,147.16
99 00008887	U9900006	SUBURBAN WATER SYSTEMS	102300379924	OH	06/17/2025		MW	IS	2,842.54
99 00008888	U9900008	T-MOBILE	0504060325	OH	06/17/2025		MW	IS	105.00
99 00008889	V9900200	UNUM LIFE INSURANCE COMPANY	0701093025	OH	06/17/2025		MW	IS	854.82
99 00008890	E9900214	WHITNEY TAKACS	060325	OH	06/17/2025		MW	IS	244.84
99 00008891	V9903352	ACTIVE EDUCATION	2585	OH	06/17/2025		MW	IS	27,718.80
99 00008892	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	JUNE25VLIFBU	OH	06/18/2025		MW	IS	1,461.82

LOWELL JOINT SD
Consolidated Check Register
from 6/1/2025 to 6/30/2025

Check	Payee ID	Payee Name	Reference	Subs	Check Date	Cancel Date	Type	Status	Check Amount
99 00008893	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	JUNE25DDR	OH	06/18/2025		MW	IS	33,834.66
99 00008894	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	JUNE25VSR	OH	06/18/2025		MW	IS	7,046.72
99 00008895	I9900021	CHRISTINE LOGAN	RANCHO 4/4 - 4/5	OH	06/18/2025		MW	IS	625.00
99 00008896	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	JUNE25VLIFBU	OH	06/18/2025		MW	IS	102.98
99 00008897	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	JUNE25DDA	OH	06/18/2025		MW	IS	2,155.32
99 00008898	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	JUNE25VSA	OH	06/18/2025		MW	IS	452.52
99 00008899	I9900021	CHRISTINE LOGAN	LJYT 5/17	OH	06/18/2025		MW	IS	175.00
99 00008900	V9903362	DELL MARKETING L.P.	10816847550	OH	06/18/2025		MW	IS	2,672.01
99 00008901	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	JUNE25VLIFBU	OH	06/18/2025		MW	IS	61.21
99 00008902	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	JUNE25DDA	OH	06/18/2025		MW	IS	1,348.27
99 00008903	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	JUNE25VSA	OH	06/18/2025		MW	IS	283.08
99 00008904	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	JUNE25VLIFBU	OH	06/18/2025		MW	IS	4.76
99 00008905	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	JUNE25DDR	OH	06/18/2025		MW	IS	186.92
99 00008906	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	JUNE25VSR	OH	06/18/2025		MW	IS	38.95
99 00008907	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	JUNE25VLIFAD	OH	06/18/2025		MW	IS	8.65
99 00008908	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	JUNE25DDA	OH	06/18/2025		MW	IS	119.74
99 00008909	V9900010	ALLIANCE OF SCHOOLS FOR COOPER	JUNE25VSA	OH	06/18/2025		MW	IS	25.14
99 00008910	F9900011	BEST LAWNMOWER INC.	113828	OH	06/20/2025		MW	IS	469.55
99 00008911	V9900028	BUENA PARK PLAQUE & TROPHY	106367	OH	06/20/2025		MW	IS	27.19
99 00008912	F9900015	CANNINGS HARDWARE LA HABRA	402718	OH	06/20/2025		MW	IS	34.61
99 00008913	E9900287	EMILEE FAITH CHEVALLIER	CHK#3720047	OH	06/20/2025		MW	IS	98.59
99 00008914	F9900033	GLASBY MAINTENANCE SUPPLY	352399A	OH	06/20/2025		MW	IS	1,360.61
99 00008915	V9903580	GRAINGER INC	9523127877	OH	06/20/2025		MW	IS	782.54
99 00008916	F9900038	ICS SERVICE COMPANY	40303	OH	06/20/2025		MW	IS	180.00
99 00008917	F9900047	LOWES	998599-PAQXW	OH	06/20/2025		MW	IS	514.60
99 00008918	R9900011	RONALD RANDOLPH	REISSUE DEC 2024OH	OH	06/20/2025		MW	IS	739.30
99 00008919	F9900059	THE HOME DEPOT PRO INSTITUTION	869324681	OH	06/20/2025		MW	IS	2,964.21
99 00008920	V9903815	ALL CITY MANAGEMENT SERVICES I	101895	OH	06/23/2025		MW	IS	2,347.62
99 00008921	V9903842	AMAZON CAPITAL SERVICES	1KW3-7DW1-	OH	06/23/2025		MW	IS	1,377.32
99 00008922	V9900020	ATKINSON ANDELSON LOYA RUUD &	751881	OH	06/23/2025		MW	IS	17,218.75
99 00008923	V9903883	AVANTIS EDUCATION INC	AVI-041243	OH	06/23/2025		MW	IS	1,999.00
99 00008924	V9903658	BANNERS AND MORE	1757	OH	06/23/2025		MW	RV	2,238.90
99 00008925	V9900024	BEARCOM	5893025	OH	06/23/2025		MW	IS	336.31
99 00008926	F9900010	BEE GONE BEE REMOVAL SERVICE	6119	OH	06/23/2025		MW	IS	175.00
99 00008927	S9990001	BEHAVIOR AND EDUCATION INC	10913425	OH	06/23/2025		MW	IS	9,620.00
99 00008928	V9903614	CONCORDIA UNIVERSITY IRVINE	04082025-LJSD	OH	06/23/2025		MW	IS	4,200.00
99 00008929	V9903858	EDUCATORS COOPERATIVE	1928	OH	06/23/2025		MW	IS	15,000.00
99 00008930	F9900031	F.M. THOMAS AIR CONDITIONING	48190	OH	06/23/2025		MW	IS	2,178.99
99 00008931	F9900033	GLASBY MAINTENANCE SUPPLY	352079B	OH	06/23/2025		MW	IS	70.47

LOWELL JOINT SD

Consolidated Check Register

from 6/1/2025 to 6/30/2025

Check	Payee ID	Payee Name	Reference	Subs Check Date	Cancel Date	Type	Status	Check Amount
99 00008932	V9903673	GOODMAN TREE SERVICE	06092025	OH 06/23/2025		MW	IS	5,062.50
99 00008933	V9900087	IMAGE APPAREL FOR BUSINESS	INV335043	OH 06/23/2025		MW	IS	42.00
99 00008934	V9900092	INTERQUEST DETECTION	RSIS-0325	OH 06/23/2025		MW	IS	645.00
99 00008935	V9900103	LAKESHORE LEARNING MATERIALS L	90632075	OH 06/23/2025		MW	IS	872.22
99 00008936	V9903445	MUCKENTHALER CULTURAL CENTER F	1814	OH 06/23/2025		MW	IS	42,180.96
99 00008937	V9900134	OCDE	94UI2843	OH 06/23/2025		MW	IS	22,500.00
99 00008938	F9900052	PDQ EQUIPMENT RENTAL	885504	OH 06/23/2025		MW	IS	2,605.17
99 00008939	F9900054	PLUMBING WHOLESALE OUTLET	S100880357.001	OH 06/23/2025		MW	IS	24.42
99 00008940	V9900148	QUADIANT FINANCE USA INC.	JUNE STMT	OH 06/23/2025		MW	IS	1,500.00
99 00008941	V9900154	READYREFRESH BY NESTLE	15F0032621385	OH 06/23/2025		MW	IS	80.64
99 00008942	V9900166	SAN JOAQUIN COUNTY OFFICE OF E	25-03099	OH 06/23/2025		MW	IS	4,000.00
99 00008943	V9903882	SCHOOL NUTRITION ASSOCIATION	ANC25-062025-617	OH 06/23/2025		MW	IS	825.00
99 00008944	U9900004	SOUTHERN CALIFORNIA EDISON	0513061125RS	OH 06/23/2025		MW	IS	12,490.74
99 00008945	U9900005	SOUTHERN CALIFORNIA GAS CO	0519061825JO	OH 06/23/2025		MW	IS	709.85
99 00008946	V9900179	SOUTHWEST SCHOOL SUPPLY	6034723798	OH 06/23/2025		MW	IS	8,885.41
99 00008947	U9900006	SUBURBAN WATER SYSTEMS	180071857152	OH 06/23/2025		MW	IS	12,930.70
99 00008948	F9900059	THE HOME DEPOT PRO INSTITUTION	869770248	OH 06/23/2025		MW	IS	188.61
99 00008949	V9903235	U.S. BANK	7553214	OH 06/23/2025		MW	IS	250.00
99 00008950	V9900203	VEX ROBOTICS	812487	OH 06/23/2025		MW	IS	10,053.98
99 00008951	U9900010	WARE DISPOSAL	1787879	OH 06/23/2025		MW	IS	9,588.99
99 00008952	V9903470	WHITTIER CHRISTIAN HIGH SCHOOL	150603	OH 06/23/2025		MW	IS	1,287.50
99 00008953	V9903842	AMAZON CAPITAL SERVICES	1R66-CTW4-FW6X	OH 06/23/2025		MW	IS	2,996.08
99 00008954	I9900020	CAMILLE VARGAS	LJYT JUN 6-13	OH 06/23/2025		MW	IS	125.00
99 00008955	E9900064	DONNA LOPEZ	D.LOPEZ	OH 06/23/2025		MW	IS	121.74
99 00008956	V9903520	JAMPANA ENTERPRISES LLC DBA CO	PS2-02-2425B	OH 06/23/2025		MW	IS	4,677.75
99 00008957	I9903532	LOGAN, BRENNEN	LJYT JUN 6-13	OH 06/23/2025		MW	IS	175.00
99 00008958	E9900139	MARY BRIMMAGE	M.BRIMM JUN	OH 06/23/2025		MW	IS	618.13
99 00008959	V9903445	MUCKENTHALER CULTURAL CENTER F	1814	OH 06/23/2025		MW	IS	4,686.79
99 00008960	V9903868	PACIFIC MARINE MAMMAL CENTER	ED_2095	OH 06/23/2025		MW	IS	4,914.00
99 00008961	V9903730	RON GUTTERMAN	LJYT 06/06-06/13	OH 06/23/2025		MW	IS	125.00
99 00008962	N9900003	BERNIER REFRIGERATION GENERATI	28958	OH 06/23/2025		MW	IS	42,130.00
99 00008963	N9900015	Continental Sales	JUNE 2025	OH 06/23/2025		MW	IS	2,920.25
99 00008964	N9900004	DRIFTWOOD DAIRY	JUNE 2025	OH 06/23/2025		MW	IS	2,187.25
99 00008965	E9900485	JACKLYN JORGE	JUNE 2025	OH 06/23/2025		MW	IS	52.25
99 00008966	V9900059	DIVISION OF THE STATE ARCHITEC	0315092	OH 06/23/2025		MW	IS	20,228.81
99 00008967	B9990011	GHATAODE BANNON ARCHITECTS	6074	OH 06/23/2025		MW	IS	9,669.69
99 00008968	B9990011	GHATAODE BANNON ARCHITECTS	6073	OH 06/23/2025		MW	IS	15,374.31
99 00008969	B9990013	HAUFFE COMPANY	565	OH 06/23/2025		MW	IS	12,500.00
99 00008970	B9903229	HAULAWAY STORAGE CONTAINERS	002260235	OH 06/23/2025		MW	IS	31.20

LOWELL JOINT SD
Consolidated Check Register
from 6/1/2025 to 6/30/2025

Check	Payee ID	Payee Name	Reference	Subs	Check Date	Cancel Date	Type	Status	Check Amount
99 00008971	B9990014	KING OFFICE SERVICES	KO-20962-5-001	OH	06/23/2025		MW	IS	13,700.00
99 00008972	V9903470	WHITTIER CHRISTIAN HIGH SCHOOL	150600	OH	06/23/2025		MW	IS	2,570.00
99 00008973	V9903847	CERRITOS FORD INC	VIN 45947	OH	06/25/2025		MW	IS	189,655.08
99 00008974	V9900008	ADMINISTRATIVE SERV. CO-OP	202505	OH	06/30/2025		MW	IS	24,161.80
Issued:									1,173,190.67
Reversed:									91,384.91
99 Bank Total:									1,264,575.58
Grand Total:									1,264,575.58

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Agreement with PQBids for Web-Based Program used to Prequalify Contractors
ACTION/
(RATIFICATION)

Prequalification is required for certain contractors when a school district project involves an expenditure of over \$1,000,000 and plans to use or be reimbursed with state funds. The California Public Contract Code sets forth guidance on developing the process to prequalify bidders before submitting a bid. The prequalification process is intended to ensure that contractors have, among other things, the appropriate experience, qualifications, and capacity for the projects.

The prequalification process involves a questionnaire to be made available to bidders at one or more of the following intervals: project-by-project, quarterly, or annually. Bidders then submit applications and, if the bidder is successful based on a uniform system of rating, the bidder is qualified for a period of one year.

The PQBids web-based service provides the means to prequalify the necessary contractors.

It is recommended that the Agreement with PQBids for Web-Based Program used to Prequalify Contractors for the period of August 5, 2025 through August 4, 2026, at a rate not to exceed \$17,250, be approved, and that the Superintendent or designee be authorized to execute the necessary documents.

DB/ds

Superintendent's Comment:

APPROVAL RECOMMENDED.



6/26/2025
12711 Newport Ave Ste G
Tustin, Ca. 92780
Call: 888-218-4173

We at PQBids are excited to offer our comprehensive web-based solution for the pre-qualification of prospective bidders. Our automated system is tailored to streamline the process, ensuring that it is compliant, reliable, and efficient.

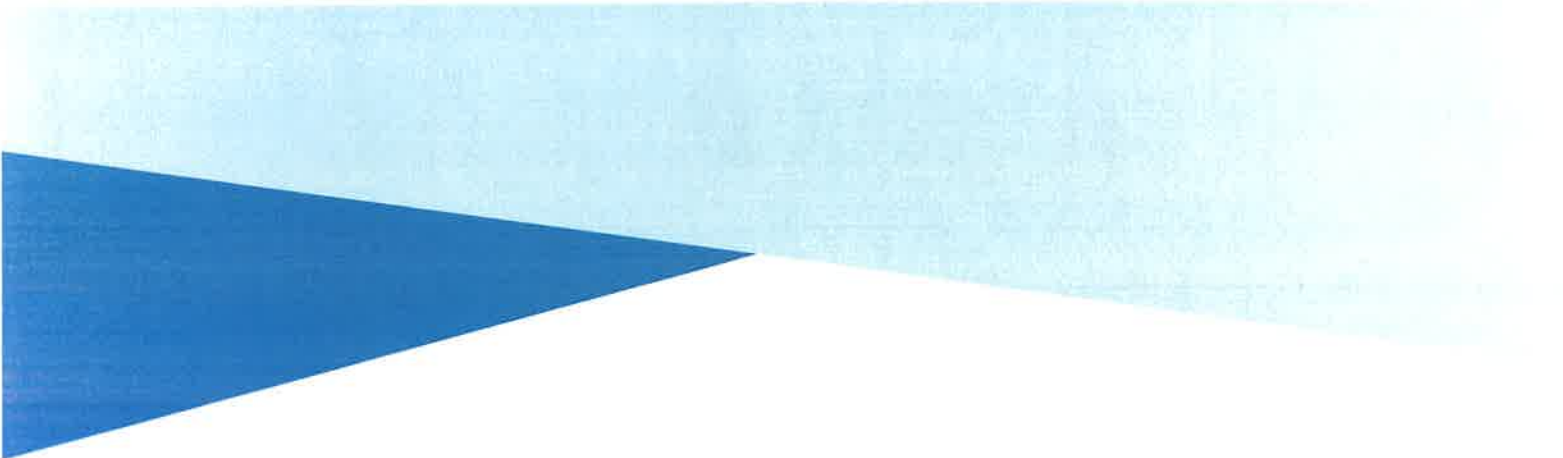
Option 1 Full Service:

1 -Year of Service: \$17,250

2 -Years of Service: \$34,500

3 -Years of Service: \$51,750

- NEW Quarterly reviews of contractors to ensure compliance.
- Access to PQBids' automated online prequalification platform.
- Prequalification of contractors using the DIR-approved questionnaire.
- Conducting interviews for contractors' two previous projects.
- In-house CPA review of contractors' financials for the past two years.
- Verification of contractors' surety and accountant release letters.
- Thorough verification of contractor licenses.
- Confirmation of contractors' DIR Registration.
- Visibility of approved contractors on the school district's website.
- Full technical support Regular system updates and maintenance.
- Annual approval of contractors.
- Districts Maintains its own Appeals procedures.
- Management support for CUPCAA software.
- Inclusion of online bidding and advertising.
- A user-friendly interface for Administrators and Contractors.
- Customizable features to meet the district's unique needs. (Adder if needed)
- Real-time data and performance analytics.
- Customer Service Dept. 8am-5pm Mon-Friday.
- Administrator training on system utilization.
- Assistance in document collection from contractors.



Optional Full Service CUPCCAA Management (Option A):

Additional \$3,450/Year

- Verify all contractors' licenses.
- Verify all contractors DIR Registration.
- Verify contractors have the necessary insurance to work.
- We will additionally advertise once a year to designated approved construction trade journals for the districts, inviting all licensed contractors to register as well as all contractors that are already in PQBids database.

Agreement and Acceptance:

Please review the terms and conditions on our website, pqbids.com. *This proposal is valid for 30 days from the date above.* We are eager to assist the **Lowell Joint Unified School District** in establishing a structured and reliable prequalification process.

For any inquiries or to discuss further, please contact us.

Option Selection: _____

Print Name: _____

Authorized Signature: _____ **Date:** _____

We appreciate your consideration and look forward to the possibility of collaborating with the Lowell Joint Unified School District.

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra, Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Ratification of Professional Services Agreement, Hauffe
Company Inc., (HCI) Program Management Services,
District Wide (Capital Outlay Projects Fund)

ACTION/
(RATIFICATION)

Background:

On June 17, 2024, the Lowell Joint School District Board of Trustees approved Resolution 2023-2024 No. 937 ordering a School Bond Election. On November 5, 2025, the voters in the Lowell Joint School District passed measure P. A part of Measure P includes the repairs and upgrades to District facilities.

Hauffe Company has provided the District construction management services all throughout Measure LL and has been a valued partner on our Bond Measure construction projects. This expenditure is subject to the purview of the Citizens Bond Oversight Committee.

Current Considerations:

Unlike the Public Works competitive bidding process, Professional Service providers can be selected on the basis of their qualifications, services they provide and their value to the Client.

As the Bond Measure P moves forward and the District Wide program continues, the District would like to engage the services of Hauffe Company Inc. (HCI) to continue to provide their expertise in schedule development, site visits, costs controls, and construction management oversight. Hauffe Company Inc. has provided the District with a proposal dated May 19, 2025, to provide specialized services and advice in financial, economic, accounting, engineering, legal, administrative and construction oversight matters.

Financial Implications

Financial Impact:	\$125,000 (40.0) Capital Outlay Projects Fund
Funding Source:	Capital Outlay Projects – Fund 40.0

Superintendent's Comment:

APPROVAL RECOMMENDED.

Recommendation:

It is recommended that the Board of Trustees ratify a Professional Services Agreement, Hauffe Company Inc., (HCI), Program Management Services, Districtwide, effective July 1, 2025 through June 30, 2026, not to exceed \$125,000, Capital Outlay Projects Fund, (40.0) and that the Superintendent or designee be authorized to execute the necessary documents.

DB/cw

Superintendent's Comment:

APPROVAL RECOMMENDED.

May 19, 2025,

Mr. David Bennett
Assistant Superintendent of Business Services
Lowell Joint School District
11019 Valley Home Avenue
Whittier, CA 90603

Re: Fee Proposal for measure LL.

Dear Mr. Bennett,

We are pleased to provide the following proposal to furnish special services for facilities program management and in support the new Bond measure LL and measure "P".

The consulting fee will not exceed \$125,000 (one hundred twenty-five thousand dollars) for the term of July 1, 2025, to June 30, 2026. The billing will be applied on level of four completion progress payments based on the following schedule.

1. 30%-July 1, 2025 to September 30, 2025 in the amount of \$37,500
2. 30%- October 1, 2025 to December 30, 2025 in the amount of \$37,500
3. 30%- January 1, 2026 to March 30, 2026 in the amount of \$37,500
4. 10%- April 1, 2026 to June 30, 2026 in the amount of \$12,500

The Hauffe Company Inc. Looks forward to continuing our successful business relationship with the district.

Sincerely,



Kurt Hauffe
President
Hauffe Company Inc.

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Contract with Whittier Christian High School,
for Student Transportation to and from the El Portal
Elementary School and Maybrook Campuses During
El Portal Elementary Modernization

ACTION

Background:

On November 5, 2024, voters in the Lowell Joint School District approved Measure "P." As part of accommodating students and staff during renovations of their home campus, it became necessary to engage a cooperative busing service to provide transportation for El Portal Elementary students to and from the Maybrook campus during the El Portal modernization project, scheduled from June 2025 through June 2026.

With the mobilization of Forma-Scorpio Inc. onto the El Portal Elementary campus, busing services will be required to transport students between the El Portal and Maybrook campuses throughout the 2025-26 school year while the modernization project is underway.

Financial Implications

Financial Impact: \$69,840

Funding Source: Fund 21.0 - Measure P General Obligation Fund

Recommendation:

It is recommended that the Board of Trustees approve a Contracted Services Agreement with Whittier Christian High School for student transportation to and from the El Portal and Maybrook campuses, effective August 13, 2025, through August 13, 2026, not to exceed \$87,300, funded by Measure P General Obligation (Fund 21.0). It is recommended that the Superintendent or designee be authorized to execute all necessary documents.

DB/ds

Superintendent's Comment:

APPROVAL RECOMMENDED.

CONTRACT AGREEMENT FOR TRANSPORTATION SERVICES

THIS AGREEMENT is made and entered into this 15th day of July 2025, by and between **Whittier Christian High School** (hereafter referred to as "WCHS") and the **Lowell Joint School District**, 11019 Valley Home Ave., Whittier, CA 90603 (hereinafter referred to as "LJSD").

1. SERVICE

- a. Whittier Christian High School (WCHS) shall provide transportation services to the Lowell Joint School District (LJSD) on a daily basis during the **2025/2026 school year**. WCHS will provide a daily shuttle between **El Portal Elementary School** bus stop location and **Maybrook Elementary School**. This service consists of one daily pickup and drop-off between these two schools: one in the morning at the start of school, and one at the end of the day when school ends. Specific times are dictated by the bell schedules provided on their website.
- b. Sub-contracted services by WCHS are not authorized in this Agreement without written consent from LJSD.
- c. WCHS shall not assign or delegate any part of this Agreement without written consent from LJSD.

2. VEHICLES & DRIVER REQUIREMENTS

- a. WCHS shall comply with all provisions of the California Vehicle Code and regulations related to student transportation established by the California State Department of Education and the California Highway Patrol.
- b. Drivers must possess a valid California Driver's License (Class 1 or 2 / A or B), a valid medical certificate, and a California Special Driver's Certificate for a school bus or SPAB (School Pupil Activity Bus) vehicle.
- c. Prior to departure from the requisitioning school site, LJSD has the right to perform a visual inspection of the vehicle and to inspect the driver's license and certifications for validity to ensure compliance with all safety and driver regulations.

3. INSURANCE

- a. **General Liability Insurance:** WCHS shall maintain commercial general liability insurance of not less than \$5,000,000 per occurrence for bodily injury, personal injury, and property damage. LJSD shall be named as an additional insured.
- b. **Automobile Liability Insurance:** WCHS shall provide LJSD with a certificate of automobile liability insurance in an amount not less than \$10,000,000 combined single limit, naming LJSD as an additional insured.

- c. **Workers' Compensation Insurance:** WCHS shall provide workers' compensation insurance for all employees performing under this Agreement. Employer's limit of liability shall be no less than \$1,000,000 per accident.
- d. **Sexual Abuse and Molestation Coverage:** WCHS shall maintain insurance coverage for acts related to physical abuse, sexual abuse, molestation, misconduct, or injury arising in connection with transportation services under this agreement. Coverage shall not be less than \$5,000,000 per occurrence.
- e. **Errors and Omissions (E&O) Liability Insurance:** WCHS shall maintain coverage for liability arising out of administrative services in connection with this agreement. Coverage shall be no less than \$5,000,000 per occurrence. LJSD shall be named as additional insured.
- f. The contractor shall provide LJSD with copies of relevant insurance policies or certificates prior to the commencement of services, if requested.

4. INDEMNIFICATION

WCHS shall defend, indemnify, and hold harmless LJSD, its officers, agents, employees, and volunteers from any liabilities, claims, demands, losses, or damages, including reasonable attorney fees, arising from the negligence of WCHS in performance under this Agreement.

5. RATES & INVOICING

- a. WCHS shall provide these transportation services at a **daily rate of \$388.00**.
- b. Field trips are billed at **\$475 per trip** for up to five (5) hours, with additional time billed at **\$95 per hour**.
- c. LJSD shall remit payment within thirty (30) days of receipt of invoice.

6. MISCELLANEOUS

- a. LJSD reserves the right to cancel any excursion without liability if WCHS fails to comply with Agreement conditions.
- b. WCHS shall indemnify and hold harmless LJSD against any injury or damage caused in whole or part by the negligence or misconduct of WCHS, its officers, agents, or employees.
- c. WCHS shall be considered an independent contractor under this Agreement.
- d. WCHS shall comply with all fingerprinting and background check requirements for any employee in contact with LJSD students, including Education Code section 45125.1.
- e. Both parties shall comply with transportation guidelines related to special education and disabled access.

TERM

This Agreement shall commence on **August 13, 2025**, and extend through **August 13, 2026**.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date first above written.

FOR DISTRICT: Lowell Joint School District 11019 Valley Home Avenue Whittier, CA 90603

By: _____

Name: _____

Title: _____

Date: _____

FOR CONTRACTOR: Whittier Christian Schools 501 N. Beach Blvd. Whittier, CA 90631

By: _____

Name: _____

Title: _____

Date: _____

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Professional Services Agreement, Nigro
and Nigro, A Professional Accountancy Corporation,
Provide a Performance Audit for State Facilities Program
Expenditure Reporting for 57/64766-003, El Portal
Elementary School

ACTION

Background:

Nigro & Nigro is a professional accountancy corporation with specialized services with K-12 Districts with over 20 years of experience, which includes certified fraud examination.

As part of the School Facilities Program (SFP) for Districts to receive State Matching funds, an independent auditor must conduct a performance audit.

Current Considerations:

The District has received a proposal from Nigro & Nigro to conduct the required performance audit in accordance with Government Auditing Standards and Education Code section 41024.

The objective of the performance audit for the El Portal Modernization Project is to express an opinion about whether the expenditures charged to the Building Fund, have been made in accordance with the Bond project list approved by the voters and therefore, have been appropriately spent according to State guidelines and hence qualify for State Facilities Program (SFP) Grant funding support.

The District has received a proposal dated July 14, 2025 from Nigro and Nigro for these performance audit services

Nigro & Nigro has been performing the District's audits since 2017 and therefore, staff recommends maintaining continuity by contracting with Nigro & Nigro

Financial Implications:

Financial Impact:	\$8,000.00
Funding Source:	Fund 40 - Special Reserve for Capital Outlay

Superintendent's Comment:

APPROVAL RECOMMENDED.

Recommendation:

It is recommended that the District approve a professional services agreement with Nigro & Nigro to conduct the required State Facilities Program (SFP) performance audit and that the Superintendent or designee be authorized to execute the necessary documents.

DB/cw

Superintendent's Comment:

APPROVAL RECOMMENDED.



July 14, 2025

To the Board of Trustees and Management of
Lowell Joint School District

We are pleased to confirm our understanding of the services we are providing for Lowell Joint School District. We will conduct a performance audit in accordance with *Government Auditing Standards* and Education Code section 41024 to ensure that school facility program (SFP) bonds have been appropriately spent according to State guidelines for Project No. 57/64766-00-003, El Portal Elementary.

Objective

The objective of our performance audit is the expression of an opinion about whether the District complied with the State's requirements with regards to the use of school facility program (SFP) bonds.

Our audit will be conducted in accordance with auditing standards generally accepted in the United States of America and will include tests of the accounting records of Lowell Joint School District and other procedures we consider necessary to enable us to express an opinion on whether the District complied with State requirements regarding the use of school facility program (SFP) bonds. If our opinion is other than unqualified, we will fully discuss the reasons with you in advance. If, for any reason, we are unable to complete the audit or form an opinion, we may disclaim an opinion or not issue a report.

Audit Procedures

An audit includes examining, on a test basis, evidence supporting the SAB 50-06 reports. Therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested. Also, we will plan and perform the audit to obtain reasonable rather than absolute assurance about whether the District complied with the State's requirements with regards to the use of school facility program (SFP) bonds, whether from errors, fraudulent financial reporting, misappropriation of assets, or violations of laws or governmental regulations that are attributable to the entity or to acts by management or employees acting on behalf of the entity. An audit is not designed, though, to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements. However, because of the concept of reasonable assurance and because we will not perform a detailed examination of all transactions, there is a risk that material misstatements may exist and not be detected by us. We will inform you of any material errors, fraudulent financial reporting or misappropriation of assets that come to our attention. In addition, we will inform you of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential. Our responsibility as auditors is, of course, limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

Jeff Nigro, CPA, CFE / Elizabeth Nigro, CPA / Shannon Bishop, CPA / Peter Glenn, CPA, CFE / Paul J. Kaymark, CPA / Jessica Berry, CPA / Angelika Vartikyan, CPA

MURRIETA OFFICE 25220 Hancock Avenue, Suite 400, Murrieta, CA 92562 • P: (951) 696-8783 • F: (951) 699-1064
WALNUT CREEK OFFICE 2121 N. California Blvd. Suite 290, Walnut Creek, CA 94596 • P: (844) 557-3111 • F: (844) 557-3444

www.nncpas.com • Licensed by the California Board of Accountancy

with regards to the use of school facility program (SFP) bonds, we will perform tests of Lowell Joint School District's compliance with applicable laws and regulations and the provisions of contracts and agreements. However, the objective of our audit will not be to provide an opinion on overall compliance and we will not express such an opinion. Management maintains the responsibility for identifying and ensuring that Lowell Joint School District complies with applicable laws, regulations, contracts, and other agreements.

An audit includes obtaining an understanding of internal control sufficient to plan the audit and to determine the nature, timing, and extent of audit procedures to be performed. An audit is not designed to provide assurance on internal control or to identify deficiencies in internal control. However, during the audit, we will communicate internal control-related matters to management and those charged with governance as required by professional standards.

Management Responsibilities

We understand that you will make all financial records and related information available to us for our audit and that you are responsible for the accuracy and completeness of that information. The management of Lowell Joint School District has the responsibility for the proper recording of transactions in the books of account, for establishing and maintaining effective internal controls, including monitoring ongoing activities, for the safeguarding of assets, for ensuring compliance with applicable laws and regulations, and for the preparation and substantial accuracy of the financial statements, in accordance with generally accepted accounting principles. Although we may advise you about appropriate accounting principles and their application, the selection and method of application are the sole responsibility of the Lowell Joint School District' management. As part of our engagement, we may also propose standard, adjusting, or correcting journal entries on your financial statements. Management, however, has final responsibility for reviewing the proposed entries and understanding the nature and impact of the proposed entries to the financial statements. It is our understanding that management has designated qualified individuals with the necessary expertise to be responsible and accountable for overseeing all services performed as part of this engagement as well as evaluating the adequacy and results of those services and accepting responsibility for the services. In addition, management is responsible for adjusting the financial statements for all material adjustments and for confirming to us in the management representation letter that all uncorrected misstatements aggregated by us during the current audit engagement are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

By your signature below, you acknowledge that you are responsible for the design and implementation of programs and controls to prevent and detect fraud, and for informing us about all known or suspected fraud affecting the government that involves management, employees who have significant roles in internal control, and others where the fraud could have a material effect on the financial statements. You are also responsible for informing us of your knowledge of any allegations of fraud or suspected fraud affecting the government that have been received in communications from employees, former employees, regulators, or others. In addition, you are responsible for identifying and ensuring that the entity complies with applicable laws and regulations and for taking timely and appropriate actions to remedy any fraud, illegal acts, or violations of contracts and agreements. You agree that you will confirm to us in your management representation letter your understanding of your responsibilities as defined in this letter.

Other

Jessica Berry is the engagement partner for the audit services specified in this letter. Her responsibilities include supervising Nigro & Nigro's services performed as part of this engagement and signing or authorizing another qualified firm representative to sign the audit report.

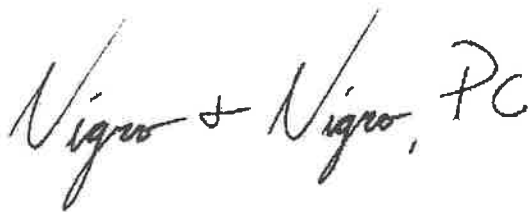
It is our policy to keep records related to this engagement for seven (7) years. However, Nigro & Nigro does not keep any original client records, so we will return those to you at the completion of the services rendered under this engagement. When records are returned to you, it is your responsibility to retain and protect your records for possible future use, including potential examination by any government or regulatory agencies. By your signature below, you acknowledge and agree that upon the expiration of the seven-year period Nigro & Nigro shall be free to destroy our records related to this engagement.

Our fees for this work will be \$8,000 For any SAB 50-06 filed with savings, our fees will be an additional \$2,000 per separate savings audit. Our invoices for these fees will be rendered each month as work progresses and are payable upon presentation. In accordance with our firm policies, work may be suspended if your account becomes 90 days or more overdue and may not be resumed until your account is paid in full. The above fee is based on anticipated cooperation from your personnel and the assumption that unexpected circumstances will not be encountered during the audit. In the event that circumstances make it necessary to perform additional work or to expend inordinate amounts of time because of (1) incompleteness of records, (2) poor working conditions, (3) abnormal errors, (4) misappropriation of funds, (5) lack of cooperation on part of the District personnel, or (6) other circumstances disclosed by our audit, it is agreed that such additional work may be subject to either special Agreement or Agreements upon a fee basis to be mutually agreed upon by all parties or may be based on our hourly rates. Before additional fees or Agreements may be instituted, the appropriate District personnel shall be informed in writing of any deficiency or difficulties as listed above. The District will have ten (10) working days to correct or implement plans to correct said deficiency, where possible. For those deficiencies that cannot be easily corrected, the District and Nigro & Nigro agree to make amendments to the Agreement to correct the deficiency and appropriately compensate us.

If a dispute arises among the parties hereto, the parties agree to first try in good faith to settle the dispute by mediation administered by the American Arbitration Association under its Rules for Professional Accounting and Related Services Disputes before resorting to litigation. The costs of any mediation proceeding shall be shared equally by all parties.

Client and accountant both agree that any dispute over fees charged by the accountant to the client will be submitted for resolution by arbitration in accordance with the Rules for Professional Accounting and Related Services Disputes of the American Arbitration Association. Such arbitration shall be binding and final. IN AGREEING TO ARBITRATION, WE BOTH ACKNOWLEDGE THAT, IN THE EVENT OF A DISPUTE OVER FEES CHARGED BY THE ACCOUNTANT, EACH OF US IS GIVING UP THE RIGHT TO HAVE THE DISPUTE DECIDED IN A COURT OF LAW BEFORE A JUDGE OR JURY AND INSTEAD WE ARE ACCEPTING THE USE OF ARBITRATION FOR RESOLUTION.

We appreciate the opportunity to be of service to Lowell Joint School District and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign the enclosed copy and return it to us.

A handwritten signature in cursive script that reads "Nigro & Nigro, PC". The signature is written in dark ink and is positioned above the printed name of the firm.

Nigro & Nigro, PC

RESPONSE:

This letter correctly sets forth the understanding of Lowell Joint School District.

APPROVED:

Lowell Joint School District

Date

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Professional Services Agreement, Nigro
and Nigro, A Professional Accountancy Corporation,
Provide a Performance Audit for State Facilities Program
Expenditure Reporting for 57/64766-002, Macy
Elementary School.

ACTION

Background:

Nigro & Nigro is a professional accountancy corporation with specialized services with K-12 Districts with over 20 years of experience, which includes certified fraud examination.

As part of the School Facilities Program (SFP) for Districts to receive State Matching funds, an independent auditor must conduct a performance audit.

Current Considerations:

The District has received a proposal from Nigro & Nigro to conduct the required performance audit in accordance with Government Auditing Standards and Education Code section 41024.

The objective of the performance audit for the Macy Modernization Project is to express an opinion about whether the expenditures charged to the Building Fund, have been made in accordance with the Bond project list approved by the voters and therefore, have been appropriately spent according to State guidelines and hence qualify for State Facilities Program (SFP) Grant funding support.

The District has received a proposal dated June 23, 2025 from Nigro and Nigro for these performance audit services

Nigro & Nigro has been performing the District's audits since 2017 and therefore, staff recommends maintaining continuity by contracting with Nigro & Nigro

Financial Implications:

Financial Impact:	\$8,000.00
Funding Source:	Fund 40 - Special Reserve for Capital Outlay

Superintendent's Comment:

APPROVAL RECOMMENDED.

Recommendation:

It is recommended that the District approve a professional services agreement with Nigro & Nigro to conduct the required State Facilities Program (SFP) performance audit and that the Superintendent or designee be authorized to execute the necessary documents.

DB/cw

Superintendent's Comment:

APPROVAL RECOMMENDED.



June 23, 2025

To the Board of Trustees and Management of
Lowell Joint School District

We are pleased to confirm our understanding of the services we are providing for Lowell Joint School District. We will conduct a performance audit in accordance with *Government Auditing Standards* and Education Code section 41024 to ensure that school facility program (SFP) bonds have been appropriately spent according to State guidelines for Project No. 57/64766-00-002, Macy Elementary.

Objective

The objective of our performance audit is the expression of an opinion about whether the District complied with the State's requirements with regards to the use of school facility program (SFP) bonds.

Our audit will be conducted in accordance with auditing standards generally accepted in the United States of America and will include tests of the accounting records of Lowell Joint School District and other procedures we consider necessary to enable us to express an opinion on whether the District complied with State requirements regarding the use of school facility program (SFP) bonds. If our opinion is other than unqualified, we will fully discuss the reasons with you in advance. If, for any reason, we are unable to complete the audit or form an opinion, we may disclaim an opinion or not issue a report.

Audit Procedures

An audit includes examining, on a test basis, evidence supporting the SAB 50-06 reports. Therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested. Also, we will plan and perform the audit to obtain reasonable rather than absolute assurance about whether the District complied with the State's requirements with regards to the use of school facility program (SFP) bonds, whether from errors, fraudulent financial reporting, misappropriation of assets, or violations of laws or governmental regulations that are attributable to the entity or to acts by management or employees acting on behalf of the entity. An audit is not designed, though, to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements. However, because of the concept of reasonable assurance and because we will not perform a detailed examination of all transactions, there is a risk that material misstatements may exist and not be detected by us. We will inform you of any material errors, fraudulent financial reporting or misappropriation of assets that come to our attention. In addition, we will inform you of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential. Our responsibility as auditors is, of course, limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

Jeff Nigro, CPA, CFE | Elizabeth Nigro, CPA | Shannon Bishop, CPA | Peter Glenn, CPA, CFE | Paul J. Kaymark, CPA | Jessica Berry, CPA | Angelika Vartikyan, CPA

MURRIETA OFFICE 25220 Hancock Avenue, Suite 400, Murrieta, CA 92562 • P: (951) 698-8783 • F: (951) 699-1064

WALNUT CREEK OFFICE 2121 N. California Blvd. Suite 290, Walnut Creek, CA 94596 • P: (844) 567-3411 • F: (844) 557-3444

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with regards to the use of school facility program (SFP) bonds, we will perform tests of Lowell Joint School District's compliance with applicable laws and regulations and the provisions of contracts and agreements. However, the objective of our audit will not be to provide an opinion on overall compliance and we will not express such an opinion. Management maintains the responsibility for identifying and ensuring that Lowell Joint School District complies with applicable laws, regulations, contracts, and other agreements.

An audit includes obtaining an understanding of internal control sufficient to plan the audit and to determine the nature, timing, and extent of audit procedures to be performed. An audit is not designed to provide assurance on internal control or to identify deficiencies in internal control. However, during the audit, we will communicate internal control-related matters to management and those charged with governance as required by professional standards.

Management Responsibilities

We understand that you will make all financial records and related information available to us for our audit and that you are responsible for the accuracy and completeness of that information. The management of Lowell Joint School District has the responsibility for the proper recording of transactions in the books of account, for establishing and maintaining effective internal controls, including monitoring ongoing activities, for the safeguarding of assets, for ensuring compliance with applicable laws and regulations, and for the preparation and substantial accuracy of the financial statements, in accordance with generally accepted accounting principles. Although we may advise you about appropriate accounting principles and their application, the selection and method of application are the sole responsibility of the Lowell Joint School District' management. As part of our engagement, we may also propose standard, adjusting, or correcting journal entries on your financial statements. Management, however, has final responsibility for reviewing the proposed entries and understanding the nature and impact of the proposed entries to the financial statements. It is our understanding that management has designated qualified individuals with the necessary expertise to be responsible and accountable for overseeing all services performed as part of this engagement as well as evaluating the adequacy and results of those services and accepting responsibility for the services. In addition, management is responsible for adjusting the financial statements for all material adjustments and for confirming to us in the management representation letter that all uncorrected misstatements aggregated by us during the current audit engagement are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

By your signature below, you acknowledge that you are responsible for the design and implementation of programs and controls to prevent and detect fraud, and for informing us about all known or suspected fraud affecting the government that involves management, employees who have significant roles in internal control, and others where the fraud could have a material effect on the financial statements. You are also responsible for informing us of your knowledge of any allegations of fraud or suspected fraud affecting the government that have been received in communications from employees, former employees, regulators, or others. In addition, you are responsible for identifying and ensuring that the entity complies with applicable laws and regulations and for taking timely and appropriate actions to remedy any fraud, illegal acts, or violations of contracts and agreements. You agree that you will confirm to us in your management representation letter your understanding of your responsibilities as defined in this letter.

Other

Jessica Berry is the engagement partner for the audit services specified in this letter. Her responsibilities include supervising Nigro & Nigro's services performed as part of this engagement and signing or authorizing another qualified firm representative to sign the audit report.

It is our policy to keep records related to this engagement for seven (7) years. However, Nigro & Nigro does not keep any original client records, so we will return those to you at the completion of the services rendered under this engagement. When records are returned to you, it is your responsibility to retain and protect your records for possible future use, including potential examination by any government or regulatory agencies. By your signature below, you acknowledge and agree that upon the expiration of the seven-year period Nigro & Nigro shall be free to destroy our records related to this engagement.

Our fees for this work will be \$8,000 For any SAB 50-06 filed with savings, our fees will be an additional \$2,000 per separate savings audit. Our invoices for these fees will be rendered each month as work progresses and are payable upon presentation. In accordance with our firm policies, work may be suspended if your account becomes 90 days or more overdue and may not be resumed until your account is paid in full. The above fee is based on anticipated cooperation from your personnel and the assumption that unexpected circumstances will not be encountered during the audit. In the event that circumstances make it necessary to perform additional work or to expend inordinate amounts of time because of (1) incompleteness of records, (2) poor working conditions, (3) abnormal errors, (4) misappropriation of funds, (5) lack of cooperation on part of the District personnel, or (6) other circumstances disclosed by our audit, it is agreed that such additional work may be subject to either special Agreement or Agreements upon a fee basis to be mutually agreed upon by all parties or may be based on our hourly rates. Before additional fees or Agreements may be instituted, the appropriate District personnel shall be informed in writing of any deficiency or difficulties as listed above. The District will have ten (10) working days to correct or implement plans to correct said deficiency, where possible. For those deficiencies that cannot be easily corrected, the District and Nigro & Nigro agree to make amendments to the Agreement to correct the deficiency and appropriately compensate us.

If a dispute arises among the parties hereto, the parties agree to first try in good faith to settle the dispute by mediation administered by the American Arbitration Association under its Rules for Professional Accounting and Related Services Disputes before resorting to litigation. The costs of any mediation proceeding shall be shared equally by all parties.

Client and accountant both agree that any dispute over fees charged by the accountant to the client will be submitted for resolution by arbitration in accordance with the Rules for Professional Accounting and Related Services Disputes of the American Arbitration Association. Such arbitration shall be binding and final. IN AGREEING TO ARBITRATION, WE BOTH ACKNOWLEDGE THAT, IN THE EVENT OF A DISPUTE OVER FEES CHARGED BY THE ACCOUNTANT, EACH OF US IS GIVING UP THE RIGHT TO HAVE THE DISPUTE DECIDED IN A COURT OF LAW BEFORE A JUDGE OR JURY AND INSTEAD WE ARE ACCEPTING THE USE OF ARBITRATION FOR RESOLUTION.

We appreciate the opportunity to be of service to Lowell Joint School District and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign the enclosed copy and return it to us.

A handwritten signature in cursive script that reads "Nigro & Nigro, PC". The signature is written in dark ink and is positioned above the printed name of the firm.

Nigro & Nigro, PC

RESPONSE:

This letter correctly sets forth the understanding of Lowell Joint School District.

APPROVED:

A handwritten signature in dark ink, appearing to be "M. M. A.", written over a horizontal line.

Lowell Joint School District

A handwritten date "6.26.25" in dark ink, written over a horizontal line.

Date

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Professional Services Agreement, Nigro
and Nigro, A Professional Accountancy Corporation,
Provide a Savings Audit for State Facilities Program
Expenditure Reporting for 57/64766-001,
Olita Elementary School

ACTION

Background:

Nigro & Nigro is a professional accountancy corporation with specialized services with K-12 Districts with over 20 years of experience, which includes certified fraud examination.

As part of the School Facilities Program (SFP) for Districts to receive State Matching funds, an independent auditor must conduct a Savings audit. Savings audits are required by DGS/OPSC anytime you report a DLOPE with savings on it which was the case with Olita Elementary School.

Current Considerations:

The District has received a proposal from Nigro & Nigro to conduct the required performance audit in accordance with Government Auditing Standards and Education Code section 41024.

The objective of the performance audit for the Olita Modernization Project is to express an opinion about whether the expenditures charged to the Building Fund, have been made in accordance with the Bond project list approved by the voters and therefore, have been appropriately spent according to State guidelines and hence qualify for State Facilities Program (SFP) Grant funding support.

The District has received a proposal dated June 23, 2025 from Nigro and Nigro for these performance audit services

Nigro & Nigro has been performing the District's audits since 2017 and therefore, staff recommends maintaining continuity by contracting with Nigro & Nigro

Financial Implications:

Financial Impact:	\$2,000.00
Funding Source:	Fund 40 - Special Reserve for Capital Outlay

Superintendent's Comment:

APPROVAL RECOMMENDED.

Recommendation:

It is recommended that the District approve a professional services agreement with Nigro & Nigro to conduct the required State Facilities Program (SFP) savings audit and that the Superintendent or designee be authorized to execute the necessary documents.

DB/cw

Superintendent's Comment:

APPROVAL RECOMMENDED.



June 17, 2025

To the Board of Trustees and Management of
Lowell Joint School District

We are pleased to confirm our understanding of the services we are providing for Lowell Joint School District. We will conduct a performance savings audit in accordance with *Government Auditing Standards* and Education Code section 41024 to ensure that school facility program (SFP) bonds have been appropriately spent according to State guidelines for Project No. 57/64766-00-001 (Savings) for Olita Elementary.

Objective

The objective of our performance audit is the expression of an opinion about whether the District complied with the State's requirements with regards to the use of school facility program (SFP) bonds.

Our audit will be conducted in accordance with auditing standards generally accepted in the United States of America and will include tests of the accounting records of Lowell Joint School District and other procedures we consider necessary to enable us to express an opinion on whether the District complied with State requirements regarding the use of school facility program (SFP) bonds. If our opinion is other than unqualified, we will fully discuss the reasons with you in advance. If, for any reason, we are unable to complete the audit or form an opinion, we may disclaim an opinion or not issue a report.

Audit Procedures

An audit includes examining, on a test basis, evidence supporting the SAB 50-06 Savings reports. Therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested. Also, we will plan and perform the audit to obtain reasonable rather than absolute assurance about whether the District complied with the State's requirements with regards to the use of school facility program (SFP) bonds, whether from errors, fraudulent financial reporting, misappropriation of assets, or violations of laws or governmental regulations that are attributable to the entity or to acts by management or employees acting on behalf of the entity. An audit is not designed, though, to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements. However, because of the concept of reasonable assurance and because we will not perform a detailed examination of all transactions, there is a risk that material misstatements may exist and not be detected by us. We will inform you of any material errors, fraudulent financial reporting or misappropriation of assets that come to our attention. In addition, we will inform you of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential. Our responsibility as auditors is, of course, limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

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As part of obtaining reasonable assurance about whether the District complied with the State's requirements with regards to the use of school facility program (SFP) bonds, we will perform tests of Lowell Joint School District's compliance with applicable laws and regulations and the provisions of contracts and agreements. However, the objective of our audit will not be to provide an opinion on overall compliance and we will not express such an opinion. Management maintains the responsibility for identifying and ensuring that Lowell Joint School District complies with applicable laws, regulations, contracts, and other agreements.

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Other

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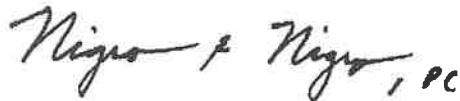
Our fees for this work will be \$2,000 per required savings audit. Our invoices for these fees will be rendered each month as work progresses and are payable upon presentation. In accordance with our firm policies, work may be suspended if your account becomes 90 days or more overdue and may not be resumed until your account is paid in full. The above fee is based on anticipated cooperation from your personnel and the assumption that unexpected circumstances will not be encountered during the audit. If significant additional time is necessary, we will discuss it with you and arrive at a new fee estimate before incurring additional costs.

If a dispute arises among the parties hereto, the parties agree to first try in good faith to settle the dispute by mediation administered by the American Arbitration Association under its Rules for Professional Accounting and Related Services Disputes before resorting to litigation. The costs of any mediation proceeding shall be shared equally by all parties.

Client and accountant both agree that any dispute over fees charged by the accountant to the client will be submitted for resolution by arbitration in accordance with the Rules for Professional Accounting and Related Services Disputes of the American Arbitration Association. Such arbitration shall be binding and final. IN AGREEING TO ARBITRATION, WE BOTH ACKNOWLEDGE THAT, IN THE EVENT OF A DISPUTE OVER FEES CHARGED BY THE ACCOUNTANT, EACH OF US IS GIVING UP THE RIGHT TO HAVE THE DISPUTE DECIDED IN A COURT OF LAW BEFORE A JUDGE OR JURY AND INSTEAD WE ARE ACCEPTING THE USE OF ARBITRATION FOR RESOLUTION.

We appreciate the opportunity to be of service to Lowell Joint School District and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign the enclosed copy and return it to us.

Very truly yours,



Nigro & Nigro, PC

RESPONSE:

This letter correctly sets forth the understanding of Lowell Joint School District.

APPROVED:

Lowell Joint School District

Date

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Employer-Employee Relations/Personnel Report 2025/2026 #1 Which Includes Hiring, Resignations, Contract Adjustments, and Retirements for
Certificated, Classified, and Confidential Employees

ACTION/
(RATIFICATION)

The attached Employer-Employee Relations/Personnel Report 2025/2026 #1, which includes hiring, resignations, contract adjustments, and retirements for certificated, classified, and confidential employees has been completed without irregularities and in compliance with the law, District policy, administrative regulations, rules, procedures, and direction of the supervisor and all information has been fully disclosed.

It is recommended that Employer-Employee Relations/Personnel Report 2025/2026 #1, which includes hiring, resignations, contract adjustments, and retirements for certificated, classified, and confidential employees, be ratified.

Attachment

JC/me

Superintendent's Comment:

APPROVAL RECOMMENDED.

LOWELL JOINT SCHOOL DISTRICT
EMPLOYER-EMPLOYEE RELATIONS/PERSONNEL REPORT 2025/2026 #1

August 4, 2025

I. CERTIFICATED EMPLOYEES

A. <u>CHANGE OF STATUS 2025-2026**</u>				
NAME	<u>EFFECTIVE</u> DATE	END DATE	SITE	COMMENT
Menendez, Maya	08/21/2025	02/27/2026	OL	(AB375) FMLA Baby Bonding Leave
Stevens, Amanda	08/11/2025	11/14/2025	OL	(AB375) FMLA Paternity Leave
Oke, Melissa	08/11/2025	09/12/2025	RS	(AB375) FMLA Paternity Leave
B. <u>2025/2026 CONTRACTS</u>				
NAME	<u>EFFECTIVE</u> DATE	<u>CLASS/COL/</u> <u>STEP</u>	SITE	COMMENTS
Epperson, Sydney	08/11/2025	C4/S4	MA	Macy 3 rd grade Teacher. Temporary Contract.
Baltierrez- Manohorathat, Georgette	07/21/2025	Column 7	DO	Probationary year 1 Contract. ELOP Coordinator.
Morales, Ivan	08/11/2025	C4/S4	DO	Music Teacher, ELOP, Mariachi strings. Temporary contract.
Lozano, Melissa	08/11/2025	C1/S1	OL	SLP Olita Elementary. Temporary Contract
C. <u>2025-2026 Certificated Salaries</u>				
NAME	<u>EFFECTIVE</u> DATE	<u>CLASS/COL/</u> <u>STEP</u>	SITE	COMMENTS
Lower, Corissa	08/11/2025	C3/S3	OL	Correction of EER #12 2024-2025
Argomaniz, Nataly	08/11/2025	C4/S6	JO	Correction of EER #12 2024-2025
Hudson, Breanna	08/11/2025	C2/S1	JO	Correction of EER #12 2024-2025
Chavez-Aviles, Yamile	08/11/2025	C3/S1	JO	Correction of EER #12 2024-2025
Fiscus, Riley	08/11/2025	C5/S4	EP	Correction of EER #12 2024-2025
Diaz Gonzalez, Pricela	08/11/2025	C4/S2	JO	Correction of EER #12 2024-2025
Brimmage, Mary	07/01/2025	Column 5	DO	Administrator on Special Assignment. Correction of EER #12 2024-2025
Gonzalez, Leslie	08/11/2025	C5/S2	MG	Kindergarten teacher. Probationary Year 1. Correction of EER #11 2024-2025
Hernandez, Javier	08/11/2025	C5/S17	JO	Correction of EER #12 2024-2025
Palmer, Margaret	08/11/2025	5/26	OL	20% - Wednesdays –LJEA union CTA paid leave. Correction of EER #12 2024-2025

D. EXTRA DUTY PAY/STIPENDS

McReynolds, Christina	08/11/2025	05/29/2026	DO	To be paid \$30.00 per month, not to exceed \$300.00, for mileage stipend. To be paid from General Fund.
Rodriguez, Brenda	08/11/2025	05/29/2026	JO	To be paid mentor teacher induction stipend of \$2000.00. To be paid from Educator Effectiveness Funds.
Jimenez, Yovanna	08/11/2025	05/29/2026	JO	To be paid mentor teacher induction stipend of \$2000.00. To be paid from Educator Effectiveness Funds.
Haro Banuelos, Byanka	08/11/2025	05/29/2026	JO	To be paid mentor teacher induction stipend of \$2000.00. To be paid from Educator Effectiveness Funds.
Ilinsky, Christina	08/11/2025	05/29/2026	EP	To be paid mentor teacher induction stipend of \$2000.00. To be paid from Educator Effectiveness Funds.
Champion, Becky	08/11/2025	05/29/2026	DO	To be paid mentor teacher induction stipend of \$2000.00. To be paid from Educator Effectiveness Funds.
Valdez, Michelle	08/11/2025	05/29/2026	MA	To be paid mentor teacher induction stipend of \$2000.00. To be paid from Educator Effectiveness Funds.
Martinez, Christian	08/11/2025	05/29/2026	RS	To be paid mentor teacher induction stipend of \$2000.00. To be paid from Educator Effectiveness Funds.
Gatto, Nancy	08/11/2025	05/29/2026	RS	To be paid mentor teacher induction stipend of \$2000.00. To be paid from Educator Effectiveness Funds.
Cooke, Kristen	08/11/2025	05/29/2026	OL	To be paid mentor teacher induction stipend of \$2000.00. To be paid from Educator Effectiveness Funds.
Cacioppo, Bianca	08/11/2025	05/29/2026	EP	To be paid mentor teacher induction stipend of \$2000.00. To be paid from Educator Effectiveness Funds.
Huff, Ken	08/11/2025	05/29/2026	RS	To be paid a total of \$700.00 monthly, not to exceed \$2100.00 for the 2025-2026 school year, for Coaching After-School Sports. Monies to be paid from the Rancho Starbuck Athletic account.
Sober, Jessica	08/11/2025	05/29/2026	MA	To be paid \$300 a month NTE \$3000.00, for ASB Stipend Macy. To be paid from Site Funds
Hernandez, Javier	08/11/2025	05/29/2026	JO	To be paid \$150.00 per month, not to exceed \$1,500.00 for serving as an Intervention Coordinator. To be paid from Supplemental Funds
Lauprecht, Robert	08/11/2025	05/29/2026	JO	To be paid a Combination (5/6) Grade Teacher Stipend of \$3000 for the 2025-2026 School Year. Correction of EER # 12 2024-2025
Baltierrez- Manohorathat Georgette	08/11/2025	05/26/2026	DO	To be paid \$30.00 per month, not to exceed \$300.00, for mileage stipend. To be paid from General Fund.

* It is further recommended that these individuals be approved for substitute teaching at the rate of \$200.00 per day and/or \$50.00 an hour rate (not to exceed six hours) as applicable and to include: Professional Development, Saturday School, Site Support Duties, Intervention, and PowerSource, Power Up, ESY

**It is further recommended that the individuals listed in Certificated Salaries for 2025-2026 is approved to instruct in the Intervention Programs. The rate of pay is \$50.00/hour and will be paid from Title I or LCFF Supplemental Grant Funds.

**It is further recommended that individuals listed in Certificated Salaries for 2025-2026 serve as home school teachers, if needed, for the 2025-2026 school year at a rate of \$50.00/hour, not to exceed five hours per week, per student. Mileage will be paid at the IRS Standard Mileage Rate for the 2025-2026 school year.

E. Employment of substitutes effective 07/01/2025 for the 2025-2026 school year @ \$200 per day and \$100.00 per half day rate, \$250.00 long term sub rate, and \$50.00 per hour* (not to exceed six hours) as applicable and to include: professional development, Saturday school, site support duties, Saturday School. Intervention, PowerUp, ESY and Power Source.

Lozano, Melissa Hernandez, Bianca Guerrero, Jennifer Colenzo, Karly
Hass, Angie

F. SUBSTITUTE CHANGE OF PAY

NAME	EFFECTIV E DATE	END DATE	SITE	COMMENT
Montemayor, Kathleen	08/11/2025	08/27/2026	DO	To be paid Long term rate of \$250 daily as 4 th grade teacher Thursdays and Fridays. Olita Elementary
Chavez, Debra	08/11/2025	09/12/2025	Do	To be paid Long term rate of \$250 daily P.E. teacher at Rancho
Costandy, Alexia	08/11/2025	11/14/2025	DO	To be paid Long term rate of \$250 daily 4 th grade teacher at Olita.
Lozano, Melissa	08/11/2025	05/29/2026	DO	To be paid at the hourly rate of \$70.00 Speech Language and Pathologist Services. NTE 6 hrs/ day.
Ruiz, Paola	08/11/2025	05/29/2026	DO	To be paid Long term rate of \$250 daily as Intervention MG – To be paid by MG Title I Funds.

II. CLASSIFIED EMPLOYEES August 4, 2025

A. MONTHLY – GENERAL FUND

B. HOURLY – GENERAL FUND

<u>NAME/ EMPLOYEE ID#</u>	<u>EFFECTIVE DATE</u>	<u>END DATE</u>	<u>RANGE/ STEP</u>	<u>SITE</u>	<u>COMMENTS</u>
Aaparicio, Gina	8/16/25		R15/S04	MG	Step Increase: Instructional Aide
Aragon, Yvonne	8/14/25		R14/S08	OL	Step Increase: Instructional Aide
Avila, Monica	8/04/25	5/29/26		DO	Mileage Stipend: LVN \$30/month
Barahona, Krystina	8/3/25				Longevity: 10 years Classified
Beiderwell, Alexis	8/16/25		R14/S04	MG	Step Increase: Instructional Aide
Brena, Lisa	8/5/25		R23/S08	MG	Step Increase: School Office Manager
Cardenas, Lauren	8/15/25		R15/S05	MA	Step Increase: CDA Preschool
Cauley, Krisha	8/13/25		R15/S03	JO	Step Increase: Health Tech

Chavez, Diane Marie	8/13/25		R15/S03	MG	Step Increase: Health Tech
Cluff, Eileen	8/11/25		R14/S05	MG	Promotion: Satellite Cafeteria Worker
Corona, Michelle	8/13/25		R15/S04	OL	Step Increase: Instructional Aide
Costello, Jennifer	8/17/25		R14/S08	MG	Step Increase: Satellite Cafeteria Worker
Coutts, Carrie	8/15/25		R16/S03	EP	Step Increase: Instructional Aide
Cramer, Samantha	8/15/25		R20/S04	OL	Step Increase: Preschool Teacher
DelOrbe, Ruth	8/14/25		R18/S05	RS	Step Increase: Cafeteria Manager
Dominguez, Martin	8/1/25		R21/S07	JO	Step Increase: Day Custodian
Felix, Lisa	8/15/25		R20/S07	MA	Step Increase: Library Media Technician
Figgins, Brian	8/13/25		R15/S02	MA	Step Increase: Health Tech
Francis, Annalisa	8/04/25	5/29/26		DO	Mileage Stipend: LVN \$30/month
Gaitan, Wendy	8/15/25		CLMG R07/S04	JO	Step Increase: Preschool Site Supervisor/Teacher
Garcia, Lisa	8/2/25		R23/S06	OL	Step Increase: School Office Manager
Garcia, Melissa	8/16/25		R07/S08	JO	Step Increase: Cafeteria Worker
Heard, Taylor	8/13/25		R15/S03	MG	Step Increase: Instructional Aide
Johnson, Rachel	8/16/25		R14/S05	JO	Step Increase: Instructional Aide
Kim, Hannah	8/9/25		R16/S04	OL	Step Increase: Clerk Typist
Kubasek, Doris	6/30/25			OL	Resignation: Instructional Aide
Lawson, Jennifer	8/14/25		R14/S05	EP	Step Increase: Satellite Cafeteria Worker
Licea, Erica	8/13/25		R16/S03	EP	Step Increase: Instructional Aide
Marquez Rodriguez, Francisco	8/15/25		R15/S04	OL	Step Increase: Instructional Aide
Martin, Jordan	8/1/22	6/30/23		DO	Mileage Stipend: Occ. Therapist \$30/month
Martin, Jordan	8/1/23	6/30/24		DO	Mileage Stipend: Occ. Therapist \$30/month
Martin, Jordan	8/1/24	6/30/25		DO	Mileage Stipend: Occ. Therapist \$30/month
Martin, Jordan	8/1/25	6/30/26		DO	Mileage Stipend: Occ. Therapist \$30/month
Marquez, Claudia	8/13/25		R15/S03	RS	Step Increase: Health Tech
Mendez, Brittany Taylor	8/15/25		R30/S05	DO	Step Increase: SLPA
Mora, Jill	8/16/25		R14/S04	JO	Step Increase: Instructional Aide
Mularkey, Elaine	8/16/25		R14/S04	OL	Step Increase: Instructional Aide
Munoz, Rae Lynn	8/16/25		R14/S04	MA	Step Increase: Instructional Aide
Paz, Carrie	8/16/25		R16/S04	MG	Step Increase: Clerk Typist
Perez, Kara	8/13/25		R14/S04	MA	Step Increase: Instructional Aide
Perez, Shari	8/22/25		R15/S05	OL	Step Increase: Instructional Aide
Perez, Stephanie	8/8/25		CLMG R07/S04	MA	Step Increase: Preschool Site Supervisor/Teacher
Perez, Stephanie	7/1/25	6/30/26			Stipend: Web Management Special Programs \$50/month

Qureshi, Lovely	8/12/25		R18/S04	OL	Promotion: ELOP Site Coordinator
Rodriguez, Beatriz	7/5/25		R27/S07	DO	Step Increase: Accounting Technician
Rodriguez, Sierra	8/15/25		R14/S03	JO	Step Increase: CDA Preschool
Sanchez, Alexandra	8/16/25		R14/S04	JO	Step Increase: Instructional Aide
Sanchez, Kris	8/14/25		R14/S08	MA	Step Increase: Satellite Cafeteria Worker
Santana, Audrey	8/1/25			MA	Resignation: Noon Duty Aide
Sato, Kay	8/16/25		R14/S04	MA	Step Increase: Instructional Aide
Solis, Wendy	8/13/25		R15/S03	MG	Step Increase: Instructional Aide
Solorzano De Fonseca, Casta	8/16/25		R14/S04	RS	Step Increase: Instructional Aide
Terrones, Patricia	7/14/25			MG	Resignation: Instructional Aide
Terrones, Patricia	7/15/25			DO	Additional Assignment: Instructional Aide substitute
Trevino, Jeanette	8/1/25		CLMG R14/S5	DO	Promotion: Accounting Supervisor
Vasquez, Randi	8/1/25	5/30/26		DO	Stipend: Web Management-District \$300/month
Vazquez, Maricela	8/12/25		R16/S08	DO	Step Increase: Instructional Aide
Vega-Arroyo, Alexis	8/13/25		R20/S03	OL	Step Increase: Preschool Teacher
Villarino, Pilar	8/15/25		R15/S07	MA	Step Increase: Instructional Aide
Westerhold, Paul	8/15/25		R14/S04	RS	Step Increase: Instructional Aide
Winik, Rebecca	6/1/25			RS	Retirement: Instructional Aide
Zarate, Laurie	8/15/25		R20/S06	SP	Step Increase: Preschool Teacher/Learning Links

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Agreement with **Autism Learning Partners** to provide ABA Therapy Services for a District Student During Expanded Learning Opportunities Program for the 2025-26 School Year. ACTION

Arrangements were made with **Autism Learning Partners** to provide ABA Therapy Services for a district student during Expanded Learning Opportunities Program (PowerSource) for the 2025-26 School Year. This is at no cost to the district.

It is recommended that the agreement with **Autism Learning Partners**, at no cost to the district, be approved and that the Superintendent or designee be authorized to execute the necessary documents.

Superintendent's Comment:

APPROVAL RECOMMENDED.

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Consultant Agreement with **Andy Fierro** to Provide Video Recording for Lowell Joint Youth Theatre during the 2025-26 School Year ACTION

Arrangements were made with **Andy Fierro** to provide video recording for Lowell Joint Youth Theatre Shows during the 2025-26 school year. **Andy Fierro's** contract amount is not to exceed \$1100.00 per site, for a total not to exceed \$5,500.00. Funding for this expenditure will be covered by Fund 12 ELOP funds.

It is recommended that the consultant agreement for **Andy Fierro** to provide video recording for Lowell Joint Youth Theatre Shows during the 2025/26 school year, at an amount of \$1100.00 per site for an amount not to exceed \$5500.00 to be paid by Fund 12 ELOP funds , approved, and that the Superintendent or designee be authorized to execute the necessary documents.

Superintendent's Comment:

APPROVAL RECOMMENDED.

LOWELL JOINT SCHOOL DISTRICT

August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Ratified Amendment to Agreement with
Boys & Girls Club La Habra to provide services for
Expanded Learning Opportunities Program for the
2025-26 School Year

ACTION/
(RATIFICATION)

Arrangements were made with Boys & Girls Club La Habra to work in partnership with Lowell Joint School District to provide a trial expanded learning opportunity program before school at Jordan Elementary for an additional \$35,000. This is in addition to the expanded learning opportunity program after school program including educational and enrichment services on all 5 elementary school sites every day for TK- 6th grades and summer programming for the 2025-2026 school year. The total cost of this is \$595,000.00 to be paid by ELO-P funds. Classes will be provided such as, but not limited to: PowerSource Jr. providing homework support utilizing Project Learn, Math Games, Power Hour, as well as STEM, Drama, and peer driven leadership and service opportunities.

It is recommended that the agreement with Boys & Girls Club La Habra not to exceed \$595,000.00 to be paid by the ELO-P funds, be approved, and that the Superintendent or designee be authorized to execute the necessary documents.

Superintendent's Comment:

APPROVAL RECOMMENDED.

LOWELL JOINT SCHOOL DISTRICT

August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Consultant Agreement with Eric Chittum to be a Set Constructor/Designer for Lowell Joint School District Performing Arts Lowell Joint Youth Theatre/PowerSource Productions during the 2025-26 School Year ACTION

Arrangements were made with Eric Chittum to be a set constructor/designer for Lowell Joint School District Performing Arts/Lowell Joint Youth Theatre productions. Eric Chittum's contract amount is not to exceed \$2000.00 for the year. Funding for this expenditure will be covered by the Fund 12 ELOP funds.

It is recommended that the consultant agreement made with Eric Chittum to be a set constructor/designer for LJSD Performing Arts/Lowell Joint Youth Theatre/PowerSource productions for the 2025-26 school year, at an amount not to exceed \$2000.00, to be paid by Fund 12 ELOP funds, be approved, and that the Superintendent or designee be authorized to execute the necessary documents.

Superintendent's Comment:

APPROVAL RECOMMENDED.

X-D4-1

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Agreement with Learning Genie to Provide a Software Subscription for use in The Transitional Kindergarten (TK) Program during the 2025–2026 school year ACTION

Learning Genie is an early learning platform that supports curriculum planning, child assessment, and family engagement for our Transitional Kindergarten (TK) program. The software includes tools for portfolio-based assessment aligned with California DRDP2015 standards, reflective lesson planning, AI-powered curriculum design, dual-language learner support, family communication with auto-translation, and contactless attendance tracking. This platform will streamline teacher planning, enhance data-driven instructional practices, and strengthen partnerships with families, ultimately improving student learning and program quality.

The cost for this service is not to exceed \$13,000 and will be covered by Restricted Lottery funds.

It is recommended that the Agreement with Learning Genie, be approved, and the Superintendent or designee be authorized to execute the necessary documents.

Superintendent's Comment:

APPROVAL RECOMMENDED.

X-D5-1

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Agreement with **YMCA Orange County** to provide services for Expanded Learning Opportunities Program during the 2025/26 School Year ACTION

Arrangements were made with **YMCA Orange County** to work in partnership with Lowell Joint School District on all 5 elementary school sites every day, for TK- 6th grades, to provide after school programming of educational and enrichment services for the 2025-2026 school year, including summer. The cost of this is \$900,000.00 to be paid by ELO-P funds. Classes such as, but not limited to: Engineering, Around the World Cultural Exploration, Cooking, Yoga, Social-Emotional Learning, Earth and Explorer and more, will be provided.

It is recommended that the agreement with **YMCA Orange County** not to exceed \$900,000.00 to be paid by the ELO-P funds, be approved, and that the Superintendent or designee be authorized to execute the necessary documents.

Superintendent's Comment:

APPROVAL RECOMMENDED.

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees
From: Jim Coombs, Superintendent of Schools
Subject: Approval of Agreement with All City Management
Services Inc. – Crossing Guard Services

ACTION/

The contract provided by All City Management Services Inc. is for Crossing Guard Services for the period August 1, 2025 through June 30, 2026.

It is recommended that the contract with All City Management Services Inc., to provide Crossing Guard Services be approved, and the Superintendent or designee be authorized to execute the necessary documents.

CE/mc

Superintendent's Comment:

APPROVAL RECOMMENDED.

X-E1-1

LOWELL JOINT SCHOOL DISTRICT
August 4, 2025

To: President Zegarra and Members, Board of Trustees

From: Jim Coombs, Superintendent of Schools

Subject: Approval of Agreement with West Coast Protection, LLC,
dba: Interquest Detection Canines, to Provide Contraband Inspection ACTION/

The contract provided by West Coast Protection, LLC, dba: Interquest Detection Canines is for canine detection services at Rancho-Starbuck Intermediate School for substance awareness and detection services for the period August 2025 through June 2026.

It is recommended that the contract with West Coast Protection, LLC, dba: Interquest Detection Canines, to Provide Contraband Inspection be approved, and the Superintendent or designee be authorized to execute the necessary documents.

CE/mc

Superintendent's Comment:

APPROVAL RECOMMENDED.

X-E2-1