Information Sheet – 5/14/2024 - Board of Trustees Meeting

TO: Board of Trustees Item: 7.4

FR: Celli Coeville, CBO

DATE: May 10, 2024

RE: Tentative Agreement with JTA Bargaining Unit & Public Disclosure (AB 1200) Forms

Background:

The District has reached a Tentative Agreement (T.A.) with the Jefferson Teacher's Association for fiscal years 2023-24 & 2024-2025.

In summary, the T.A. states the District shall offer an 8% one-time (lump sum) retention bonus based on 2023-2024 earnings, to be paid on the unit member's current (2023-2024) step and column rate.

An ongoing percentage increase of 8% to the 2023-2024 salary schedule effective July 1, 2024. Effective July 1, 2024 the Health and Welfare cap will increase by $800 to total $11,000.

Fiscal Impact:

Please see attached AB 1200 Public Disclosure Statement page 1 for costs associated with JTA. The multi-year projections include costs for JTA and unrepresented groups

Recommended Action: Approval of the T.A.'s with the JTA bargaining unit & Public Disclosure (AB 1200) forms.

Public Disclosure of Collective Bargaining Agreement

In Accordance with AB 1200 (Statutes of 1991, Chapter 1213) and GC 3547.5 and 3540.2

Name of School District:	Jefferson Elementary School District
Name of Bargaining/Represented Unit:	Jefferson Teacher's Association
Certificated, Classified, Other:	Certificated

The proposed agreement covers the period beginning: July 1, 2023 (date) and ending June 30, 2024 (date)

The Governing Board will act upon this agreement on: May 14, 2024 (date)

A. Proposed Change in Compensation

	Compensation	Annual Cost Prior to Proposed Agreement	Fiscal Impact of Proposed Agreement (All Funds) Complete years 2 and 3 for multi-year agreements only.		
			Year 1 Increase/ (Decrease)	Year 2 Increase/ (Decrease)	Year 3 Increase/ (Decrease)
		2023-2024	2023-2024	2024-2025	2025-2026
1	**Salary Schedule** Ongoing Increase (Decrease)	$ 10,222,414	$ -	$ 1,375,000	$ -
		On-going year-over-year change	0.00%	8.00%	0.00%
2	**Other Compensation -** Increase (Decrease) (Stipends, Bonuses, Overtime, etc.)-One time	$ -	$ 1,014,937	$ -	$ -
		Description	ne-time Off Schedule Retention I	8% ongoing	
3	**Statutory Benefits -** STRS, PERS, FICA, WC, UI, Medicare etc.	$ 2,313,284	$ 185,063	$ 185,063	$ -
4	**Health/Welfare Benefits**	$ 1,137,190	$ -	$ 120,000	$ -
5	**Total Compensation -** Increase (Decrease) (Total Lines 1-4)	$ 13,672,888	$ 1,200,000	$ 1,680,063	$ -
6	**Total Number of Represented Employees** (Use FTEs if appropriate)	150.00			
7	**Total Compensation Average Cost per Employee**	$ 91,153	$ 8,000	$ 11,200	$ -
		Year-over-year change	8.78%	11.30%	0.00%

If the agreement increases or decreases costs, a multiyear projection must be attached.

Public Disclosure of Collective Bargaining Agreement

In Accordance with AB 1200 (Statutes of 1991, Chapter 1213) and GC 3547.5 and 3540.2

Name of School District:	Jefferson Elementary School District
Name of Bargaining/Represented Unit:	Unrepresented
Certificated, Classified, Other:	Jefferson Certificated Management, Classified Management, Confidential & Classified

The proposed agreement covers the period beginning: July 1, 2023 (date) and ending June 30, 2024 (date)

The Governing Board will act upon this agreement on: May 14, 2024 (date)

A. Proposed Change in Compensation

	Compensation	Annual Cost Prior to Proposed Agreement 2023-2024	Fiscal Impact of Proposed Agreement (All Funds) Complete years 2 and 3 for multi-year agreements only. Year 1 Increase/ (Decrease) 2023-2024	Year 2 Increase/ (Decrease) 2024-2025	Year 3 Increase/ (Decrease) 2025-2026
1	**Salary Schedule** Ongoing Increase (Decrease)	$ 6,305,051	$ -	$ 491,000	$ -
		On-going year-over-year change	0.00%	8.00%	0.00%
2	**Other Compensation -** Increase (Decrease) (Stipends, Bonuses, Overtime, etc.)-One time	$ -	$ 288,734	$ -	$ -
		Description	ne-time Off Schedule Retention I	Off Schedule Bonus	
3	**Statutory Benefits -** STRS, PERS, FICA, WC, UI, Medicare etc.	$ 1,903,867	$ 152,309	$ 152,309	$ -
4	**Health/Welfare Benefits**	$ 698,024	$ -	$ 92,000	$ -
5	**Total Compensation -** Increase (Decrease) (Total Lines 1-4)	$ 8,906,942	$ 441,043	$ 735,309	$ -
6	**Total Number of Represented Employees** (Use FTEs if appropriate)	115.00			
7	**Total Compensation Average Cost per Employee**	$ 77,452	$ 3,835	$ 6,394	$ -
		Year-over-year change	4.95%	7.87%	0.00%

If the agreement increases or decreases costs, a multiyear projection must be attached.

Public Disclosure of Collective Bargaining Agreement

Name of Bargaining/Represented Unit: Jefferson Teacher's Association

B. SUMMARY

FISCAL EFFECTS

CHANGES TO COMPENSATION (SALARIES AND BENEFITS)

For 2023-2024, the District shall offer an 8% one-time (lump sum) retention bonus based on 2023-2024 earnings, to be paid on the unit member's current (2023-2024) step and column rate. An ongoing percentage increase to the 2023-24 salary schedule of 8% effective 2024-25. The "Me Too" clause for all other unrepresented District employees. Effective 2024-2025, the Health and Welfare cap will increase to $11,000.

OTHER FISCAL EFFECTS

None

FUNDING SOURCES

The on-going increase of 8% starting in 2024-2025 will be funded with unrestricted general fund dollars. The one-time 8.0% (lump sum) amount will be paid with Grant fund dollars

OTHER CHANGES

Longevity stipend of 2% at 32 years.

CERTIFICATION

In accordance with Government Code Section 3547.5(b), I hereby certify that the costs incurred by the school district under this agreement can be met by the district during the agreement's term. The budget revisions necessary to meet the costs of the agreement are described above. (Must be signed in the copy presented to the board)

District Superintendent	***Date***	***Chief Business Official***	***Date***

C. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET

Unrestricted General Fund

Enter Bargaining Unit: Jefferson Teacher's Association

	mn 1 Latest Budget submitted to COE (Orig. Adopted, 1st Interim, or 2nd Interim) As of 1/31/2024	Column 2 Adjustments as a Result of Settlement (include revisions for cost of settlement and other revisions necessary to fund settlement)	Column 3 Other Revisions since budget in column 1 unrelated to settlement	Column 4 tal Current Budget (Columns 1+2+3)
REVENUES				
	$ 32,738,646	$ -	$ -	$ 32,738,646
	$ 1,052,472	$ -	$ -	$ 1,052,472
	$ 33,791,118	**$ -**	**$ -**	**$ 33,791,118**
EXPENDITURES				
	$ 13,043,716	$ -	$ -	$ 13,043,716
	$ 3,157,084	$ -	$ -	$ 3,157,084
	$ 5,774,479	$ -	$ -	$ 5,774,479
	$ 1,408,237	$ -	$ -	$ 1,408,237
Services & Operating Expenses (5000-5999)	$ 3,612,468	$ -	$ -	$ 3,612,468
	$ 85,000	$ -	$ -	$ 85,000
Other Outgo (7100-7299) (7400-7499)	$ 561,879	$ -	$ -	$ 561,879
Direct support/Indirect Costs (7300-7399)	$ (67,918)	$ -	$ -	$ (67,918)
	$ 27,574,945	**$ -**	**$ -**	**$ 27,574,945**
OPERATING SURPLUS (DEFICIT)	$ 6,216,173	$ -	$ -	$ 6,216,173
Transfers In and Other Sources (8910-8979)	$ -	$ -	$ -	$ -
Transfers Out and Other Uses (7610-7699)	$ -	$ -	$ -	$ -
Contributions (8980-8999)	$ (5,060,756)	$ -	$ -	$ (5,060,756)
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	$ 1,155,417	$ -	$ -	$ 1,155,417
BEGINNING BALANCE (9791)	$ 10,059,249			$ 10,059,249
Audit Adjustments/Restatements (9793 & 9795)	$ -			$ -
CURRENT-YEAR ENDING BALANCE	$ 11,214,666	$ -	$ -	$ 11,214,666
COMPONENTS OF ENDING BALANCE:				
Restricted and Nonspendable (9711-9740)	$ 7,140	$ -	$ -	$ 7,140
Committed Amounts (9750-9760)	$ 4,500,000	$ -	$ -	$ 4,500,000
Reserve for Economic Uncertainties (9789)	$ 1,354,794	$ -	$ -	$ 1,354,794
Other Assignments (9780)	$ 1,783,077	$ -	$ -	$ 1,783,077
Unassigned/Unappropriated (9790)	$ 3,569,655	$ -	$ -	$ 3,569,655

C. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET

DO NOT COMPLETE FOR NO COST AGREEMENTS

Restricted General Fund

Enter Bargaining Unit: Jefferson Teacher's Association

	mn 1 Latest Budget submitted to COE (Orig. Adopted, 1st Interim, or 2nd Interim) As of 1/31/2024	Column 2 Adjustments as a Result of Settlement (include revisions for cost of settlement and other revisions necessary to fund settlement)	Column 3 Other Revisions since budget in column 1 unrelated to settlement	Column 4 al Current Budget (Columns 1+2+3)
REVENUES				
	$ -	$ -	$ -	$ -
	$ 6,853,973	$ -	$ -	$ 6,853,973
	$ 6,853,973	**$ -**	**$ -**	**$ 6,853,973**
EXPENDITURES				
	$ 2,183,496	$ 1,014,937	$ -	$ 3,198,433
	$ 1,327,071	$ 288,734	$ -	$ 1,615,805
	$ 2,179,764	$ 337,372	$ -	$ 2,517,136
	$ 7,324,382	$ (1,641,043)	$ -	$ 5,683,339
Services & Operating Expenses (5000-5999)	$ 4,187,923	$ -	$ -	$ 4,187,923
	$ 146,227	$ -	$ -	$ 146,227
Other Outgo (7100-7299) (7400-7499)	$ 203,062	$ -	$ -	$ 203,062
Direct support/Indirect Costs (7300-7399)	$ 32,918	$ -	$ -	$ 32,918
	$ 17,584,843	**$ -**	**$ -**	**$ 17,584,843**
OPERATING SURPLUS (DEFICIT)	$ (10,730,870)	$ -	$ -	$ (10,730,870)
Transfers In and Other Sources (8910-8979)	$ -	$ -	$ -	$ -
Transfers Out and Other Uses (7610-7699)	$ -	$ -	$ -	$ -
Contributions (8980-8999)	$ 5,060,756	$ -	$ -	$ 5,060,756
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	$ (5,670,114)	$ -	$ -	$ (5,670,114)
BEGINNING BALANCE (9791)	$ 7,835,827			$ 7,835,827
Audit Adjustments/Restatements (9793 & 9795)	$ -			$ -
CURRENT-YEAR ENDING BALANCE	$ 2,165,713	$ -	$ -	$ 2,165,713
COMPONENTS OF ENDING BALANCE:				
Restricted and Nonspendable (9711-9740)	$ 2,165,713	$ -	$ -	$ 2,165,713
Committed Amounts (9750-9760)	$ -	$ -	$ -	$ -
Reserved for Economic Uncertainties (9789)	$ -	$ -	$ -	$ -
Other Assignments (9780)	$ -	$ -	$ -	$ -
Unassigned/Unappropriated (9790)	$ -	$ -	$ -	$ -

C. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET

Combined General Fund

Enter Bargaining Unit: Jefferson Teacher's Association

	mn 1 Latest Budget submitted to COE (Orig. Adopted, 1st Interim, or 2nd Interim) As of 1/31/2024	Column 2 Adjustments as a Result of Settlement (include revisions for cost of settlement and other revisions necessary to fund settlement)	Column 3 Other Revisions since budget in column 1 unrelated to settlement	Column 4 tal Current Budget (Columns 1+2+3)
REVENUES				
	$ 32,738,646	$ -	$ -	$ 32,738,646
	$ 7,906,445	$ -	$ -	$ 7,906,445
	$ 40,645,091	**$ -**	**$ -**	**$ 40,645,091**
EXPENDITURES				
	$ 15,227,212	$ 1,014,937	$ -	$ 16,242,149
	$ 4,484,155	$ 288,734	$ -	$ 4,772,889
	$ 7,954,243	$ 337,372	$ -	$ 8,291,615
	$ 8,732,619	$ (1,641,043)	$ -	$ 7,091,576
Services & Operating Expenses (5000-5999)	$ 7,800,391	$ -	$ -	$ 7,800,391
	$ 231,227	$ -	$ -	$ 231,227
Other Outgo (7100-7299) (7400-7499)	$ 764,941	$ -	$ -	$ 764,941
Direct support/Indirect Costs (7300-7399)	$ (35,000)	$ -	$ -	$ (35,000)
	$ 45,159,788	**$ -**	**$ -**	**$ 45,159,788**
OPERATING SURPLUS (DEFICIT)	$ (4,514,697)	$ -	$ -	$ (4,514,697)
Transfers In and Other Sources (8910-8979)	$ -	$ -	$ -	$ -
Transfers Out and Other Uses (7610-7699)	$ -	$ -	$ -	$ -
Contributions (8980-8999)	$ -	$ -	$ -	$ -
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	$ (4,514,697)	$ -	$ -	$ (4,514,697)
BEGINNING BALANCE (9791)	$ 17,895,076			$ 17,895,076
Audit Adjustments/Restatements (9793 & 9795)	$ -			$ -
CURRENT-YEAR ENDING BALANCE	$ 13,380,379	$ -	$ -	$ 13,380,379
COMPONENTS OF ENDING BALANCE:				
Restricted and Nonspendable (9711-9740)	$ 2,172,853	$ -	$ -	$ 2,172,853
Committed Amounts (9750-9760)	$ 4,500,000	$ -	$ -	$ 4,500,000
Reserve for Economic Uncertainties (9789)	$ 1,354,794	$ -	$ -	$ 1,354,794
Other Assignments (9780)	$ 1,783,077	$ -	$ -	$ 1,783,077
Unassigned/Unappropriated (9790)	$ 3,569,655	$ -	$ -	$ 3,569,655

D. IMPACT OF PROPOSED AGREEMENT ON SUBSEQUENT YEARS

Unrestricted General Fund

Enter Bargaining Unit: Jefferson Teacher's Association

	Column A Current Year Budget After Settlement	Column B Change from Current Year to First Subsequent	Column C First Subsequent Year After Settlement	Column D Change from First Subsequent to Second Subsequent	Column E Second Subsequent Year After Settlement
Fiscal Year	2023-24		2024-25		2025-26
REVENUES					
	$ 32,738,646	$ 1,717,791	$ 34,456,437	$ 1,328,363	$ 35,784,800
	$ 1,052,472	$ -	$ 1,052,472	$ -	$ 1,052,472
	$ 33,791,118	$ 1,717,791	**$ 35,508,909**	$ 1,328,363	**$ 36,837,272**
EXPENDITURES					
	$ 13,043,716	$ 3,600,656	$ 16,644,372	$ 229,041	$ 16,873,413
	$ 3,157,084	$ 988,356	$ 4,145,440	$ 59,317	$ 4,204,757
	$ 5,774,479	$ 929,908	$ 6,704,387	$ 99,267	$ 6,803,654
	$ 1,408,237	$ 1,300,000	$ 2,708,237	$ (1,300,000)	$ 1,408,237
Services & Operating Expenses (5000-5999)	$ 3,612,468	$ 500,000	$ 4,112,468	$ -	$ 4,112,468
	$ 85,000	$ 500,000	$ 585,000	$ (500,000)	$ 85,000
Other Outgo (7100-7299) (7400-7499)	$ 561,879	$ -	$ 561,879	$ -	$ 561,879
Direct support/Indirect Costs (7300-7399)	$ (67,918)	$ -	$ (67,918)	$ -	$ (67,918)
	$ 27,574,945	$ 7,818,920	**$ 35,393,865**	$ (1,412,375)	**$ 33,981,490**
OPERATING SURPLUS (DEFICIT)	$ 6,216,173	$ (6,101,129)	$ 115,044	$ 2,740,738	$ 2,855,782
Transfers In and Other Sources (8910-8979)	$ -	$ -	$ -	$ -	$ -
Transfers Out and Other Uses (7610-7699)	$ -	$ -	$ -	$ -	$ -
Contributions (8980-8999)	$ (5,060,756)	$ (278,290)	$ (5,339,046)	$ -	$ (5,339,046)
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	$ 1,155,417	$ (6,379,419)	$ (5,224,002)	$ 2,740,738	$ (2,483,264)
BEGINNING BALANCE (9791)	$ 10,059,249	$ 1,155,417	$ 11,214,666	$ (5,224,002)	$ 5,990,664
Audit Adjustments/Restatements (9793 & 9795)	$ -	$ -		$ -	
CURRENT-YEAR ENDING BALANCE	$ 11,214,666	$ (5,224,002)	$ 5,990,664	$ (2,483,264)	$ 3,507,400
COMPONENTS OF ENDING BALANCE:					
Restricted and Nonspendable (9711-9740)	$ 7,140	$ -	$ 7,140	$ -	$ 7,140
Committed Amounts (9750-9760)	$ 4,500,000	$ (3,000,000)	$ 1,500,000	$ (1,000,000)	$ 500,000
Reserve for Economic Uncertainties (9789)	$ 1,354,794	$ (103,520)	$ 1,251,274	$ (40,020)	$ 1,211,254
Other Assignments (9780)	$ 1,783,077	$ -	$ 1,783,077	$ -	$ 1,783,077
Unassigned/Unappropriated (9790)	$ 3,569,655	$ (2,120,482)	$ 1,449,173	$ (1,443,244)	$ 5,929

D. IMPACT OF PROPOSED AGREEMENT ON SUBSEQUENT YEARS

Restricted General Fund

Enter Bargaining Unit: Jefferson Teacher's Association

Fiscal Year	Column A Current Year Budget After Settlement 2023-24	Column B Change from Current Year to First Subsequent	Column C First Subsequent Year After Settlement 2024-25	Column D Change from First Subsequent to Second Subsequent	Column E Second Subsequent Year After Settlement 2025-26
REVENUES					
	$ -	$ -	$ -	$ -	$ -
	$ 6,853,973	$ (3,585,449)	$ 3,268,524	$ -	$ 3,268,524
	$ 6,853,973	$ (3,585,449)	**$ 3,268,524**	$ -	**$ 3,268,524**
EXPENDITURES					
	$ 3,198,433	$ (1,057,452)	$ 2,140,981	$ 33,244	$ 2,174,225
	$ 1,615,805	$ (163,078)	$ 1,452,727	$ 19,959	$ 1,472,686
	$ 2,517,136	$ (351,629)	$ 2,165,507	$ 25,170	$ 2,190,677
	$ 5,683,339	$ (4,168,450)	$ 1,514,889	$ -	$ 1,514,889
Services & Operating Expenses (5000-5999)	$ 4,187,923	$ (3,400,963)	$ 786,960	$ -	$ 786,960
	$ 146,227	$ (50,000)	$ 96,227	$ -	$ 96,227
Other Outgo (7100-7299) (7400-7499)	$ 203,062	$ -	$ 203,062	$ -	$ 203,062
Direct support/Indirect Costs (7300-7399)	$ 32,918	$ -	$ 32,918	$ -	$ 32,918
	$ 17,584,843	$ (9,191,572)	**$ 8,393,271**	$ 78,373	**$ 8,471,644**
OPERATING SURPLUS (DEFICIT)	$ (10,730,870)	$ 5,606,123	$ (5,124,747)	$ (78,373)	$ (5,203,120)
Transfers In and Other Sources (8910-8979)	$ -	$ -	$ -	$ -	$ -
Transfers Out and Other Uses (7610-7699)	$ -	$ -	$ -	$ -	$ -
Contributions (8980-8999)	$ 5,060,756	$ 278,290	$ 5,339,046	$ -	$ 5,339,046
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	$ (5,670,114)	$ 5,884,413	$ 214,299	$ (78,373)	$ 135,926
BEGINNING BALANCE (9791)	$ 7,835,827	$ (5,670,114)	$ 2,165,713	$ 214,299	$ 2,380,012
Audit Adjustments/Restatements (9793 & 9795)	$ -	$ -		$ -	
CURRENT-YEAR ENDING BALANCE	$ 2,165,713	$ 214,299	$ 2,380,012	$ 135,926	$ 2,515,938
COMPONENTS OF ENDING BALANCE:					
Restricted and Nonspendable (9711-9740)	$ 2,165,713	$ 214,299	$ 2,380,012	$ 135,926	$ 2,515,938
Committed Amounts (9750-9760)	$ -	$ -	$ -	$ -	$ -
Reserve for Economic Uncertainties (9789)	$ -	$ -	$ -	$ -	$ -
Other Assignments (9780)	$ -	$ -	$ -	$ -	$ -
Unassigned/Unappropriated (9790)	$ -	$ -	$ -	$ -	$ -

D. IMPACT OF PROPOSED AGREEMENT ON SUBSEQUENT YEARS

Combined General Fund

Enter Bargaining Unit: Jefferson Teacher's Association

	Column A Current Year Budget After Settlement	Column B Change from Current Year to First Subsequent	Column C First Subsequent Year After Settlement	Column D Change from First Subsequent to Second Subsequent	Column E Second Subsequent Year After Settlement
Fiscal Year	2023-24		2024-25		2025-26
REVENUES					
	$ 32,738,646	$ 1,717,791	$ 34,456,437	$ 1,328,363	$ 35,784,800
	$ 7,906,445	$ (3,585,449)	$ 4,320,996	$ -	$ 4,320,996
	$ 40,645,091	$ (1,867,658)	$ 38,777,433	$ 1,328,363	$ 40,105,796
EXPENDITURES					
	$ 16,242,149	$ 2,543,204	$ 18,785,353	$ 262,285	$ 19,047,638
	$ 4,772,889	$ 825,278	$ 5,598,167	$ 79,276	$ 5,677,443
	$ 8,291,615	$ 578,279	$ 8,869,894	$ 124,437	$ 8,994,331
	$ 7,091,576	$ (2,868,450)	$ 4,223,126	$ (1,300,000)	$ 2,923,126
Services & Operating Expenses (5000-5999)	$ 7,800,391	$ (2,900,963)	$ 4,899,428	$ -	$ 4,899,428
	$ 231,227	$ 450,000	$ 681,227	$ (500,000)	$ 181,227
Other Outgo (7100-7299) (7400-7499)	$ 764,941	$ -	$ 764,941	$ -	$ 764,941
Direct support/Indirect Costs (7300-7399)	$ (35,000)	$ -	$ (35,000)	$ -	$ (35,000)
	$ 45,159,788	$ (1,372,652)	$ 43,787,136	$ (1,334,002)	$ 42,453,134
OPERATING SURPLUS (DEFICIT)	$ (4,514,697)	$ (495,006)	$ (5,009,703)	$ 2,662,365	$ (2,347,338)
Transfers In and Other Sources (8910-8979)	$ -	$ -	$ -	$ -	$ -
Transfers Out and Other Uses (7610-7699)	$ -	$ -	$ -	$ -	$ -
Contributions (8980-8999)	$ -	$ -	$ -	$ -	$ -
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	$ (4,514,697)	$ (495,006)	$ (5,009,703)	$ 2,662,365	$ (2,347,338)
BEGINNING BALANCE (9791)	$ 17,895,076	$ (4,514,697)	$ 13,380,379	$ (5,009,703)	$ 8,370,676
Audit Adjustments/Restatements (9793 & 9795)	$ -	$ -	$ -	$ -	$ -
CURRENT-YEAR ENDING BALANCE	$ 13,380,379	$ (5,009,703)	$ 8,370,676	$ (2,347,338)	$ 6,023,338
COMPONENTS OF ENDING BALANCE:					
Restricted and Nonspendable (9711-9740)	$ 2,172,853	$ 214,299	$ 2,387,152	$ 135,926	$ 2,523,078
Committed Amounts (9750-9760)	$ 4,500,000	$ (3,000,000)	$ 1,500,000	$ (1,000,000)	$ 500,000
Reserve for Economic Uncertainties (9789)	$ 1,354,794	$ (103,520)	$ 1,251,274	$ (40,020)	$ 1,211,254
Other Assignments (9780)	$ 1,783,077	$ -	$ 1,783,077	$ -	$ 1,783,077
Unassigned/Unappropriated (9790)	$ 3,569,655	$ (2,120,482)	$ 1,449,173	$ (1,443,244)	$ 5,929

E. Reserves

State Reserve Standard

	Fiscal Year	2023-24	2024-25	2025-26
a.	Total Expenditures, Transfers Out, and Uses (Including Cost of Proposed Agreement)	$ 45,159,788	$ 43,787,136	$ 42,453,134
b.	State Standard Minimum Reserve Percentage for this District	3%	3%	3%
c	State Standard Minumum Reserve Amount for this District (For districts with les than 1,001 ADA, this is the greater of Line a times Line b, or $50,000)	**$ 1,354,794**	**$ 1,313,614**	**$ 1,273,594**

Budgeted Unrestricted Reserve (After Impact of Proposed Agreement)

a.	General Fund Budgeted Unrestricted Reserve for Economic Uncertainties (9789)	$ 1,354,794	$ 1,251,274	$ 1,211,254
b.	General Fund Budgeted Unassigned/Unappropriated (9790)	$ 3,569,655	$ 1,449,173	$ 5,929
c.	Special Reserve Fund (Fund 17) Budgeted Reserve for Economic Uncertainties (9789)	$ -	$ -	$ -
d.	Special Reserve Fund (Fund 17) Budgeted Unassigned/Unappropriated Amount (9790)	$ -	$ -	$ -
e.	Total Available Reserves	$ 4,924,449	$ 2,700,447	$ 1,217,183
f.	Reserves in Excess of State Reserve Standard	$ 3,569,655	$ 1,386,833	$ (56,411)

F. IMPACT OF PROPOSED AGREEMENT ON CURRENT YEAR OPERATING BUDGET

Enter Fund:
Enter Bargaining Unit:

	mn 1 Latest Budget submitted to COE (Orig. Adopted, 1st Interim, or 2nd Interim) As of (_____)	Column 2 Adjustments as a Result of Settlement (include revisions for cost of settlement and other revisions necessary to fund settlement)	Column 3 Other Revisions since budget in column 1 unrelated to settlement	Column 4 tal Current Budget (Columns 1+2+3)
REVENUES				
	$ -	$ -	$ -	$ -
	$ -	$ -	$ -	$ -
	$ -	**$ -**	**$ -**	**$ -**
EXPENDITURES				
	$ -	$ -	$ -	$ -
	$ -	$ -	$ -	$ -
	$ -	$ -	$ -	$ -
	$ -	$ -	$ -	$ -
Services & Operating Expenses (5000-5999)	$ -	$ -	$ -	$ -
	$ -	$ -	$ -	$ -
Other Outgo (7100-7299) (7400-7499)	$ -	$ -	$ -	$ -
Direct support/Indirect Costs (7300-7399)	$ -	$ -	$ -	$ -
	$ -	**$ -**	**$ -**	**$ -**
OPERATING SURPLUS (DEFICIT)	$ -	$ -	$ -	$ -
Transfers In and Other Sources (8910-8979)	$ -	$ -	$ -	$ -
Transfers Out and Other Uses (7610-7699)	$ -	$ -	$ -	$ -
Contributions (8980-8999)	$ -	$ -	$ -	$ -
CURRENT YEAR INCREASE (DECREASE) IN FUND BALANCE	$ -	$ -	$ -	$ -
BEGINNING BALANCE (9791)	$ -			$ -
Audit Adjustments/Restatements (9793 & 9795)	$ -			$ -
CURRENT-YEAR ENDING BALANCE	$ -	$ -	$ -	$ -
COMPONENTS OF ENDING BALANCE:				
Restricted and Nonspendable (9711-9740)	$ -	$ -	$ -	$ -
Committed Amounts (9750-9760)	$ -	$ -	$ -	$ -
Reserve for Economic Uncertainties (9789)	$ -	$ -	$ -	$ -
Other Assignments (9780)	$ -	$ -	$ -	$ -
Unassigned/Unappropriated (9790)	$ -	$ -	$ -	$ -

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April 5, 2024

TO: JENIENE CRUZ –JTA President
JENNIFER GATES and ANNE CORBISER - JTA Bargaining Team

FROM: JIM BRIDGES, SUPERINTENDENT,
EMILY STROUP, DIRECTOR OF HUMAN RESOURCES,
CELLI COEVILLE, CBO -Jefferson School District Negotiating Team
TESSA BUNCH -Jefferson School District Negotiating Team

ISSUE: JTA Contract for 2023 - 2026

Red – Tentative Agreements
BLACK – *CURRENT CONTRACT LANGUAGE*

Jefferson Elementary School District
This is only representing articles to be negotiated

Article 4 - Organizational Security/Payroll Deduction

4.1 Dues Deduction

4.1.3 With respect to all sums deducted by the District pursuant to authorization of the unit member, for membership dues, the District agrees ~~promptly~~ to remit such monies to the Association along with an alphabetical list of unit members for whom such deductions have been made and any changes that may have occurred since the previous list, on the 1st of every month.

Article 6 – Hours/Working Conditions

6.3 Preparation Time

6.3.3.1 Unit members who substitute during their preparation periods shall be paid ~~$35.00~~ $42.50 per period. If the unit member substitutes less than 15 minutes they shall be paid ~~$17.50~~ $21.25. ~~Starting with the 11th instance, the unit member shall be paid $40.00 per period, or if the unit member substitutes less than 15 minutes they shall be paid $20.00.~~

6.5 Work Year

6.5.1 Unit members shall provide instruction for 180 days per year. In addition, there shall be ~~two full teacher workdays, one and a half (1 ½)~~ **two and a half (2 ½) teacher workdays, two (2)** prior to the first day of student instruction and one half (1/2) after the last day of student instruction. In addition, there shall be one (1) non-student day for parent conferences. On the first day prior to

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instruction, teachers will be given time to work in their classrooms. The scheduling of such work days for each school year shall be set forth in Appendix B, "School Calendar." APPROVED CALENDAR

Article 9 - Leaves

9.2 Sick Leave

9.2.1.7 Deductible sick leave may be taken for yourself or a family member, for preventative care or diagnosis, care or treatment of an existing health condition, or for specified purposes if you are a victim of domestic violence, sexual assault or stalking.

9.2.1.7.1 Family members include the employee's parent, child, spouse, registered domestic partner, grandparent, grandchild, sibling or designated person.

9.4 Personal Necessity Use of Sick Leave

9.4.5.1 Up to ~~three (3)~~ five (5) unit members shall be granted discretionary use of Personal Necessity days at the same time.

9.8 Bereavement Leave

9.8.1 A unit member shall be granted Bereavement Leave for the death of, or in time of war MIA notification for, any member of the immediate family. This leave shall be for three (3) days; an additional two (2) days may be taken and charged against sick leave credits, in such case the length of the leave shall be for five (5) days. Leave must be completed within three months. ~~(3) months of the date of death. unless travel of more than two hundred fifty (250) miles each way is required; in such case the length of the leave shall be for five (5) days.~~

Article 11 - Association Rights

11.4 Access to Information

11.4.3 If available, the District shall provide the Association the name, work location, address, home and personal cellular telephone number, and personal email address of new unit members within 30 days of employment, or at the first pay period following employment unless the unit member has requested this information be withheld to preserve personal privacy. The District agrees to provide the Association with this information for all employees in the bargaining unit twice yearly on October 15th and April 15th.

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Article 14 - Term and Re-Opener

14.1 Term

14.1.1 This Agreement shall remain in full force and effect from ~~July 1, 2020 through June 30, 2023~~ July 1, 2023 through June 30, 2026.

Article 16 - Salaries

16.1 Salary Schedule

16.1.1 For ~~2022-2023~~ 2023-2024, the district shall offer a ~~10%~~ 8% ongoing salary increase beginning ~~July 1, 2022~~ July 1, 2024. ~~In addition, the district shall offer an additional 1% ongoing salary increase beginning at Step 15, an additional 2% ongoing salary increase beginning at Step 19, and an additional 1% ongoing salary increase beginning at Step 22, all beginning July 1, 2022.~~

At the bottom of the salary schedule, the following language will be amended to read: Longevity Stipend of 2% at 30 years of service, 32 years of service, and 35 years of service.

All longevity years of service will be counted for employees hired prior to January 1st, 2024. For employees hired after January 1, 2024, longevity will be counted based on Jefferson School District years of service.

(This section shall result in no retroactive adjustments. All new rates will take effect July 1, 2024.)

- *For 2023-2024, the district shall offer an 8% one-time retention bonus to be paid on the unit member's current (2023-2024) step and column rate.*

Appendix B

Instructional Calendar attached HERE

Appendix D

Salary Schedule attached HERE

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Appendix E – Extra-Duty Stipend Schedule
Jefferson Elementary

Extra-Curricular Athletics		
Grade(s)	Activity	Stipend
5th – 8th	Athletic Coach*	~~$650~~ $850
5th – 8th	Athletic Referee**	$30 per game
5th – 8th	Athletic Director***	$2,000 per school year
5th – 8th	Athletic Supply Budget	$2,500 per school year

Extra-Curricular Music		
Grade(s)	Activity	Stipend
5th – 8th	Band Director	$650
5th – 8th	Marching Band Director	$650
5th – 8th	Band Supply Budget	$2,500 per school year

Extra-Curricular Other		
Grade(s)	Activity	Stipend
6th	Science Camp	$125 per day
	Yearbook	~~$1000~~ $1500 per site
	PLC Grade Level Lead	$2250
	Middle School ASB Leadership ***	~~$1000~~ $1500
TK - 8	Induction/Mentor Teacher	$1200

*Maximum of 15 paid stipends per school per year
**Maximum of 50 paid stipends per school per year
***Maximum of 2 paid stipend per school per year

- Effective July 1, ~~2022~~ 2024

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Appendix G

Memorandum of Understanding – Additional Day

This provision shall be attached as an appendix to the Agreement.

One additional mandatory professional development day, prior to the start of school, will be added each year for the ~~2021-2022, 2022-2023, and 2023-2024~~ 2024-2025, 2025-2026 school years to be paid at the unit member's daily rate, for a total of ~~184~~ 184.5 work days each of the ~~three~~ two years. This agreement may be terminated by March 15 for the following school year by either party.

This MOU expires on ~~June 30, 2024~~ June 30, 2026.

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Appendix H

Memorandum of Understanding – Virtual Half Day

This provision shall be attached as an appendix to the Agreement.

Per Article 6.5.1, there are ~~1 ½~~ 2 work days prior to the first day of student instruction. The district and JTA agree, for the ~~2023-2024~~ 2024-2025 school year, to designate ~~August 2, 2023~~ August 1, 2024 to be a virtual ~~½~~ full day for all unit members to complete the required Keenan Courses. These courses shall be available beginning July 1, ~~2023~~ 2024 and must be completed before 8:00 AM on ~~August 4, 2023~~ August 2, 2024, or the unit member will be docked ~~½~~ one (1) day of sick leave. ~~The unit member will still be required to complete the courses prior to September 29, 2023 with no compensation~~. The unit member will be required to complete all courses prior to working with students. The district and JTA will discuss the results of course completion and determine if this MOU will be extended.

JSD and JTA agree to extend the MOU expiration date to June 30, ~~2023~~ 2025.

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Appendix I

Memorandum of Understanding – Summer School Teaching Hours

The Jefferson Elementary School District ("District") and Jefferson Teachers Association ("Association") enter this Memorandum of Understanding ("MOU") regarding the teacher hours outlined below for ~~Summer School 2021~~ ESY 2024. This will be revisited after ~~summer school~~ ESY is completed to determine if it will be continued for future years.

DATES:	**June 3 and June 4, 2024 (Planning days, no students)**
WORK HOURS:	**8:00 a.m. – 3:30 p.m. (7.5 hours/day)**

DATES:	**June 5 - June 28, 2024 (Students) (No School June 19, 2024)**
WORK HOURS:	**7:30 a.m. – 12:45 p.m. (hours/day) (Students from 8:00 to 12:00, Teacher planning time from 12:00 - 12:45) (5.25 hours/day)**

DATES:	**July 1 and July 2, 2024 (Students from 8:00 to 12:00, Teacher wrap up from 12:00 to 3:00)**
WORK HOURS:	**7:30 a.m. – 3:00 p.m. (7.5 hours/day)**

Shall be compensated at a rate of $70 per hour.

4 days @ 7.5 hour hours:	**$2,100.00**
17 days @ 5.25 hours:	**$6,247.50**
	$8,347.50

This MOU expires on ~~July 1, 2023~~ July 3, 2024.

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Appendix L

Memorandum of Understanding – Class Size

This provision shall be attached as an appendix to the Agreement.

The District and JTA agree to the following for the ~~2022-2023 and 2023-2024~~ 2023-2024, 2024-2025, 2025-2026 school years:

Jefferson Elementary School District shall maintain an average class enrollment for each school site, for kindergarten and grades 1 to 3, inclusive, of not more than 28 pupils. The district shall balance classes in relationship to the needs of the instructional program, provided prudent fiscal management can be maintained.

Additional Compensation shall be granted for 26 or more students in Kindergarten through 3rd Grade.

The district will pay $300 per month to teachers, Kindergarten through 3rd Grade, excluding music, who had 26 or more students for at least 50% of the school days of each school month; with the exception of August and June. An overage form must be submitted each month to the payroll office. Effective July 1, 2022.

The district will pay $500 per month to RSP teachers, Kindergarten through 8th Grade, who agree to a Resource Specialist Caseload Waiver and are actively carrying a caseload between 29 and 32 students. An overage form must be submitted each month to the payroll office. Effective March 1, 2023.

The district will pay $50 per month, per period, to teachers, excluding PE and music, who had more than 32 students in a given period for at least 50% of the school days of each school month; with the exception of August and June. An overage form must be submitted each month to the payroll office. Effective March 1, 2023.

The district will pay ~~$50~~ $100 per month, per period, to 4th through 8th grade PE teachers who had more than 37 students across a given period for at least 50% of the school days of each school month, OR who had five (5) or more SDC students push in for at least 50% of the school days of each school month; with the exception of August and June. An overage form must be submitted each month to the payroll office. Effective July 1, 2024.

The district will pay ~~$50~~ $100 per month, per period, to TK through 8th grade Music teachers who had more than 45 students across a given period for at least 50% of the school days of each school month; with the exception of August and June. An overage form must be submitted each month to the payroll office. Effective July 1, 2024.

This MOU expires on July 1, ~~2024~~ 2026.

TA SIGNATURE PAGE

Jefferson Teachers Association
Jennifer Gates, Lead Negotiator, Jefferson School

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Jennifer Gates 4/5/2024
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Anne Corbiser, Tom Hawkins

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Jeniene Cruz, President, JTA, Tom Hawkins

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Jefferson School District
Jim Bridges, Superintendent

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Jim Bridges 4/5/2024
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Emily Stroup, Director of Human Resources

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Celli Coeville, CBO

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Tessa Bunch, Principal, Monticello - Note Taker

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Tessa Bunch 4/5/2024
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April 5, 2024

TO: JENIENE CRUZ –JTA President
JENNIFER GATES and ANNE CORBISER - JTA Bargaining Team

FROM: JIM BRIDGES, SUPERINTENDENT,
EMILY STROUP, DIRECTOR OF HUMAN RESOURCES,
CELLI COEVILLE, CBO -Jefferson School District Negotiating Team
TESSA BUNCH -Jefferson School District Negotiating Team

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Jefferson Elementary School District
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Article 15 – Health and Welfare Benefits

15.2 Benefits Contribution

15.2.1 The district shall provide a maximum of ~~$10,200~~ $11,000 per year to each unit member for health and welfare benefits, starting on July 1, ~~2023~~ 2024.

TA SIGNATURE PAGE

Jefferson Teachers Association
Jennifer Gates, Lead Negotiator, Jefferson School

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Anne Corbiser, Tom Hawkins

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Jeniene Cruz, President, JTA, Tom Hawkins

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Signature Date

Jefferson School District
Jim Bridges, Superintendent

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Jim Bridges 4/5/2024
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Emily Stroup, Director of Human Resources

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Emily Stroup 4/5/2024
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Celli Coeville, CBO

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