

**ITEM 11**  
**INCORRECT REDUCTION CLAIM**  
**REVISED PROPOSED DECISION**

Government Code Sections 3540-3549.9

Statutes 1975, Chapter 961; Statutes 1991, Chapter 1213

*Collective Bargaining and Collective Bargaining Agreement Disclosure*

Fiscal Years 2002-2003 through 2005-2006

09-4425-I-17 and 10-4425-I-18

Sierra Joint Community College District, Claimant

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# SixTen and Associates

## Mandate Reimbursement Services

**KEITH B. PETERSEN, President**  
3270 Arena Blvd. Suite 400-363  
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August 3, 2009

Paula Higashi, Executive Director  
Commission on State Mandates  
980 Ninth Street, Suite 300  
Sacramento, CA 95814

Re: Incorrect Reduction Claim  
Collective Bargaining  
Fiscal Years: 2002-03 through 2005-06

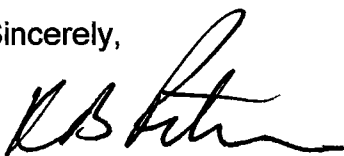
Dear Ms. Higashi:

Enclosed is the original and two copies of the above referenced incorrect reduction claim for Sierra Joint Community College District.

SixTen and Associates has been appointed by the District as its representative for this matter and all interested parties should direct their inquiries to me, with a copy as follows:

Joyce Lopes, Director of Finance  
Sierra Joint Community College District  
5000 Rocklin Road  
Rocklin, CA 95677

Sincerely,



Keith B. Petersen



# COMMISSION ON STATE MANDATES

## 1. INCORRECT REDUCTION CLAIM TITLE

961/75 Collective Bargaining

## 2. CLAIMANT INFORMATION

Sierra Joint Community College District

Joyce Lopes  
Director of Finance  
5000 Rocklin Road  
Rocklin, CA 95677  
Voice: 916-789-2658  
Fax: 916-781-0455  
E-Mail: [jlopes@sierracollege.edu](mailto:jlopes@sierracollege.edu)

## 3. CLAIMANT REPRESENTATIVE INFORMATION

Claimant designates the following person to act as its sole representative in this incorrect reduction claim. All correspondence and communications regarding this claim shall be forwarded to this representative. Any change in representation must be authorized by the claimant in writing, and sent to the Commission on State Mandates.

Keith B. Petersen, President  
SixTen and Associates  
3841 North Freeway Blvd., Suite 170  
Sacramento, CA 95834  
Voice: (916) 565-6104  
Fax: (916) 564-6103  
E-mail: \_\_\_\_\_

*For CSM Use Only*

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

**RECEIVED**

AUG 04 2009

COMMISSION ON STATE MANDATES

## 4. IDENTIFICATION OF STATUTES OR EXECUTIVE ORDERS

Statutes of 1975, Chapter 961  
Statutes of 1991, Chapter 1213

## 5. AMOUNT OF INCORRECT REDUCTION

<u>Fiscal Year</u>	<u>Amount of Reduction</u>
2002-03	\$17,971
2003-04	\$0
2004-05	\$0
2005-06	\$0
<b>TOTAL:</b>	<b>\$17,971</b>

## 6. NOTICE OF NO INTENT TO CONSOLIDATE

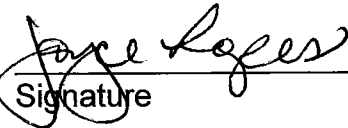
This claim is not being filed with the intent to consolidate on behalf of other claimants.

- Sections 7-12 are attached as follows:
- 7. **Written Detailed Narrative:** Pages 1 to 15
  - 8. **Controller's May 2, 2009 letter** Exhibit A
  - 9. **Parameters and Guidelines:** Exhibit B
  - 10. **Claiming Instructions:** Exhibit C
  - 11. **Controller's Audit Report:** Exhibit D
  - 12. **Annual Reimbursement Claims:** Exhibit E

## 13. CLAIM CERTIFICATION

This claim alleges an incorrect reduction of a reimbursement claim filed with the State Controller's Office pursuant to Government Code section 17561. This incorrect reduction claim is filed pursuant to Government Code section 17551, subdivision (d). I hereby declare, under penalty of perjury under the laws of the State of California, that the information in this incorrect reduction claim submission is true and complete to the best of my own knowledge or information or belief.

Joyce Lopes  
Director of Finance

 \_\_\_\_\_  
Signature

7/20/09  
Date

1 Claim Prepared by:  
2 Keith B. Petersen  
3 SixTen and Associates  
4 3841 North Freeway Blvd., Suite 170  
5 Sacramento, California 95834  
6 Voice: (916) 565-6104  
7 Fax: (916) 564-6103  
8 E-mail: Kbpsixten@aol.com

9 BEFORE THE

10 COMMISSION ON STATE MANDATES

11 STATE OF CALIFORNIA

12	INCORRECT REDUCTION CLAIM OF: )	No. CSM _____
13	)	
14	)	Chapter 961, Statutes of 1975
15	)	Chapter 1213, Statutes of 1991
16	<b>SIERRA JOINT</b> )	
17	)	<b><u>Collective Bargaining</u></b>
18	<b>Community College District</b> )	
19	)	Annual Reimbursement Claims:
20	Claimant. )	
21	)	Fiscal Year 2002-03
22	)	Fiscal Year 2003-04
23	)	Fiscal Year 2004-05
24	_____ )	Fiscal Year 2005-06

25 INCORRECT REDUCTION CLAIM FILING

26 PART I. AUTHORITY FOR THE CLAIM

27 The Commission on State Mandates has the authority, pursuant to Government  
28 Code Section 17551(d), to "hear and decide upon a claim by a local agency or school  
29 district filed on or after January 1, 1985, that the Controller has incorrectly reduced  
30 payments to the local agency or school district pursuant to paragraph (2) of subdivision  
31 (d) of Section 17561." Sierra Joint Community College District (hereinafter "District" or

Incorrect Reduction Claim of Sierra Joint Community College District  
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1 “Claimant”) is a school district as defined in Government Code Section 17519.<sup>1</sup> Title 2,  
2 CCR, Section 1185(a), requires the claimant to file an incorrect reduction claim with the  
3 Commission.

4 This Incorrect Reduction Claim is timely filed. Title 2, CCR, Section 1185(b),  
5 requires incorrect reduction claims to be filed no later than three years following the  
6 date of the Controller’s remittance advice notifying the claimant of a reduction. A  
7 Controller’s final audit report dated April 17, 2009, has been issued. The audit report  
8 constitutes a demand for repayment and an adjudication of the claim. On May 2, 2009,  
9 the Controller issued a “results of review” letter reporting the audit results for the FY  
10 2002-03 claim, demanding payment of an amount due to the state. A copy of the  
11 Controller’s letter is attached as Exhibit “A.”

12 There is no alternative dispute resolution process available from the Controller’s  
13 Office. The audit report states that an incorrect reduction claim should be filed with the  
14 Commission if the Claimant disagrees with the findings.

15 PART II. SUMMARY OF THE CLAIM

16 The Controller conducted a field audit of the District’s annual reimbursement  
17 claims for the District’s actual costs of complying with the legislatively mandated  
18 Collective Bargaining program (Chapter 961, Statutes of 1975; Chapter 1213, Statutes

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<sup>1</sup> Government Code Section 17519, added by Chapter 1459, Statutes of 1984,  
Section 1:

“School district’ means any school district, community college district, or county  
superintendent of schools.”

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of 1991), for the period July 1, 2002 through June 30, 2006. As a result of the audit, the Controller determined that \$17,971 of the \$803,036 claimed costs were unallowable:

<u>Fiscal Year</u>	<u>Amount Claimed</u>	<u>Audit Adjustment</u>	<u>SCO Payments</u>	<u>Amount Due &lt;State&gt; District</u>
2002-03	\$322,166	\$17,971	\$322,166	<\$17,971>
2003-04	\$234,496	\$0	\$0	\$234,496
2004-05	\$84,769	\$0	\$0	\$84,769
2005-06	<u>\$161,605</u>	<u>\$0</u>	<u>\$0</u>	<u>\$161,605</u>
Totals	\$803,036	\$17,971	\$322,166	\$462,899

Since the District has been paid \$322,166 for these claims, the audit report concludes that \$462,899 is due to the District.

**PART III. PREVIOUS INCORRECT REDUCTION CLAIMS**

The District has not filed any previous incorrect reduction claims for this mandate program. The District is not aware of any other incorrect reduction claims having been adjudicated on the specific issues or subject matter raised by this incorrect reduction claim.

**PART IV. BASIS FOR REIMBURSEMENT**

**1. Mandate Legislation**

Chapter 961, Statutes of 1975 (the "Rodda Act") established Chapter 10.7, Division 4, of Title 1 of the Government Code (commencing with Section 3540), and repealed Article 5, Chapter 1, of Division 10 of the Education Code (the "Winton Act"). The Rodda Act established the Public Employees Relations Board (PERB) and required

Incorrect Reduction Claim of Sierra Joint Community College District  
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1 public school employers to meet and negotiate with their employees regarding terms  
2 and conditions of employment, including wages and hours of employment. The  
3 provisions relating to the creation, certain duties of, and appropriations for the Public  
4 Employment Relations Board became operative on January 1, 1976. The provisions  
5 relating to employees' organizational rights, the representative rights of employee  
6 organizations, the recognition of exclusive representatives, and related procedures  
7 became operative on April 1 and July 1, 1976.

8 Chapter 1213, Statutes of 1991, added Government Code section 3547.5, which  
9 requires school districts to publicly disclose major provisions of a collective bargaining  
10 agreement after negotiations but before the agreement becomes binding.

11 2. Test Claim

12 The State Board of Control, the predecessor agency to the Commission on State  
13 Mandates, determined the Rodda Act constituted a reimbursable state mandate at its  
14 meeting on July 17, 1978. It found that public school employers had new duties, not  
15 previously required by the Winton Act, to meet and negotiate in good faith for binding  
16 contracts with employee group representatives. Subsequent action of the Board of  
17 Control recognized that compliance with the regulations of the Public Employment  
18 Relations Board is included within the scope of the mandate to the extent that the  
19 regulations implement the provisions of the Rodda Act and its amendments.

20 On March 26, 1998, the Commission on State Mandates determined that  
21 Chapter 1213, Statutes of 1991, resulted in a new program or higher level of service by

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1 requiring school districts to publicly disclose major provisions of a collective bargaining  
2 agreement after negotiations and before the agreement becomes binding.

3 3. Parameters and Guidelines

4 On October 22, 1980, the original Parameters and Guidelines for Collective  
5 Bargaining were adopted. Those Parameters and Guidelines were amended seven  
6 times between August 19, 1981 and July 22, 1993. The Parameters and Guidelines for  
7 Collective Bargaining Agreement Disclosure were adopted on August 20, 1998, and  
8 consolidated with the Collective Bargaining Parameters and Guidelines. The  
9 consolidated Parameters and Guidelines were adopted on January 27, 2000. This is  
10 believed to be the version extant at the time the claims that are the subject of this  
11 incorrect reduction claim were filed. A copy of those Parameters and Guidelines is  
12 attached as Exhibit "B."

13 4. Claiming Instructions

14 The Controller has periodically issued or revised claiming instructions for the  
15 Collective Bargaining claim. The September 2003 claiming instructions are believed to  
16 be substantially similar to the version extant at the time the claims that are the subject  
17 of this Incorrect Reduction Claim were filed. A copy of the September 2003 revision of  
18 the claiming instructions is attached as Exhibit "C." However, because the Controller's  
19 claim forms and instructions have not been adopted as regulations, they have no force  
20 of law and no effect on the outcome of this Incorrect Reduction Claim.

21 /

1                   PART V. STATE CONTROLLER CLAIM ADJUDICATION

2                   The Controller conducted an audit of the District's annual reimbursement claims  
3 for fiscal years 2002-03, 2003-04, 2004-05, and 2005-06. The final audit report, dated  
4 April 17, 2009, concluded that \$17,971 of the District's costs claimed were unallowable.  
5 A copy of the final audit report is attached as Exhibit "D."

6                   PART VI. CLAIMANT'S RESPONSE TO THE STATE CONTROLLER

7                   The Controller transmitted a copy of its draft audit report by letter dated June 9,  
8 2008. The District objected to the proposed adjustments set forth in the draft audit  
9 report by letter dated July 3, 2008. A copy of this letter is included in Exhibit "D," the  
10 final audit report. The Controller then issued its final audit report without material  
11 change to the adjustments as stated in the draft audit report

12                   PART VII. STATEMENT OF THE ISSUES

13                   **Finding 1- Unallowable salaries and benefits**

14                   The final audit report eliminates \$14,489 in direct costs and \$4,938 in related  
15 indirect costs as unallowable salary and benefit costs. It asserts that costs were  
16 overstated by \$16,731 in FY 2002-03, and understated by \$2,242 in FY 2004-05. The  
17 unallowable salaries and benefits adjustment was a result of three individual issues: (1)  
18 inaccurate productive hourly rates; (2) unsupported hours; and (3) ineligible costs.

19                   Productive Hourly Rates

20                   The final audit report asserts that the District applied inaccurate productive  
21 hourly rates, resulting in costs that were overstated by \$9,186 for FY 2002-03 and

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1 understated by \$2,242 for FY 2004-05, leaving a net audit adjustment of \$6,944. The  
2 claims submitted by the District include a list of productive hourly rates for each  
3 employee by mandate component.

4 The single difference between the rates calculated by the Controller and the  
5 District is the salary component. The Controller altered the salary component for  
6 specific employees and then necessarily arrived at productive hourly rates that differed  
7 from the rates calculated by the District. No explanation was provided for any of these  
8 adjustments, and there is no indication as to why the payroll information reported by the  
9 District needed to be adjusted for purposes of the productive hourly rate computation.  
10 The propriety of these adjustments cannot be determined until the Controller states the  
11 reason for each change to the employee payroll information.

12 Unsupported Hours

13 The final audit report disallowed \$4,468 in costs for FY 2002-03 as unsupported  
14 hours. The District does not dispute this finding.

15 Ineligible Costs

16 The final audit report disallowed \$3,077 in expenses claimed by the District in FY  
17 2002-03 for two District administrators to attend a personnel manager's conference  
18 (ACHRO). The District does not dispute this finding.

19 **Finding 2 - Unallowable Contract Services Costs Claimed**

20 Finding 2 disallows \$1,900 for FY 2002-03 for mediator services. The District  
21 does not dispute this finding.



1 **Finding 3 - Understated indirect costs**

2 Finding 3 concludes that the District improperly determined and applied the  
3 indirect cost rate. As a result, indirect costs were understated by \$94,818 for the audit  
4 period. However, the Controller maintains that audit adjustments may only be made to  
5 reduce claimed costs, and any under-claimed costs are to be disregarded.

6 Federal Approval

7 Subsection (H)(6) of the Parameters and Guidelines allows community colleges  
8 to calculate an indirect cost rate according to the OMB Circular A-21 methodology so  
9 long as it is federally-approved. There has been no amendment to the Parameters and  
10 Guidelines to remove this provision. Therefore, the final audit report's statement that  
11 "[f]or FY 2004-05 and FY 2005-06, the *parameters and guidelines* and the SCO's  
12 claiming instructions do not provide districts the option of using a federally-approved  
13 rate" is false. (Emphasis added.)

14 The final audit report also claims "[t]he parameters and guidelines state, 'Indirect  
15 costs may be claimed in the manner described by the State Controller in his claiming  
16 instructions.'" This is also false - that statement is not found anywhere in the  
17 Parameters and Guidelines for the Collective Bargaining mandate. Federally-approved  
18 indirect cost rates remain acceptable pursuant to the Parameters and Guidelines for the  
19 Collective Bargaining mandate, despite the Controller's preference to the contrary.

20 Indirect Cost Rate Calculation

21 Contrary to the conclusions of the final audit report, the District did not use an

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1 indirect cost rate calculated in accordance with OMB Circular A-21 for its annual  
2 reimbursement claims. Both the District's method and the Controller's FAM-29C method  
3 utilize the same source document, the CCFS-311 annual financial and budget report  
4 required by the State. The difference in the claimed and audited rates is the  
5 determination of which of those cost elements are direct costs and which are indirect  
6 costs. Indeed, federally "approved" rates, which the Controller will accept without  
7 further action prior to FY 2004-05, are "negotiated" rates calculated by the District and  
8 submitted for approval, indicating that the process is not an exact science, but a  
9 determination of the relevance and reasonableness of the costs allocation assumptions  
10 made for the method used.

11 The Controller insists that the rate be calculated according to the claiming  
12 instructions. Neither state law nor the Parameters and Guidelines make compliance  
13 with the Controller's claiming instructions a condition of reimbursement. The District  
14 utilized the CCFS-311 classification of accounts which is more rational and consistent  
15 than the Controller's evolving formula. Since the Controller's claiming instructions were  
16 never adopted as law, or regulations pursuant to the Administrative Procedure Act, the  
17 claiming instructions are a statement of the Controller's interpretation and not law.

18 Unreasonable or Excessive

19 Government Code Section 17561(d)(2) requires the Controller to pay claims,  
20 provided that the Controller may audit the records of any school district to verify the  
21 actual amount of the mandated costs, and may reduce any claim that the Controller

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1 determines is excessive or unreasonable. The Controller is authorized to reduce a claim  
2 only if it determines the claim to be excessive or unreasonable. However, the final audit  
3 report states that this is not the only applicable standard because "Government Code  
4 Section 12410 states, 'The Controller shall audit all claims against the state, and may  
5 audit the disbursement of any state money, for correctness, legality, and for sufficient  
6 provisions of law for payment.'"

7 Section 12410 is found in the part of the Government Code that provides a  
8 general description of the duties of the Controller. It is not specific to the audit of  
9 mandate reimbursement claims. The only applicable audit standard is found in  
10 Government Code Section 17561(d)(2), which specifically pertains to the audit  
11 standards for mandate reimbursement claims. The fact that Section 17561(d)(2)  
12 specifies its own audit standard (excessive or unreasonable) implies that the general  
13 SCO audit standard (correctness, legality, and sufficient provisions of law for payment)  
14 is not generally intended to apply. Therefore, the Controller may only reduce a mandate  
15 reimbursement claim if it specifically finds that the amounts claimed are unreasonable  
16 or excessive under Section 17561(d)(2).

17 Further, the Controller has not asserted or demonstrated that, if Section 12410  
18 was the applicable standard, the audit adjustments were made in accordance with this  
19 standard. The District's claim was correct, in that it reported the actual costs incurred.  
20 There is also no allegation in the audit report that the claim was in any way illegal.  
21 Finally, the phrase "sufficient provisions of law for payment" refers to the requirement

Incorrect Reduction Claim of Sierra Joint Community College District  
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1 that there be adequate appropriations prior to the disbursement of any funds. There is  
2 no indication that any funds were disbursed without sufficient appropriations. Thus,  
3 even if standards of Section 12410 were applicable to mandate reimbursement audits,  
4 the Controller has failed to put forth any evidence that these standards are not met.

5 Additionally, there is no indication that the Controller is actually relying on the  
6 audit standards set forth in Section 12410 for the adjustments to the District's  
7 reimbursement claims. The final audit report asserts that it did indeed determine that  
8 the District's costs were excessive, as required by Section 17561(d)(2). However, The  
9 audit did not determine that the District's rate was excessive or unreasonable, just that  
10 it wasn't federally approved. In rebuttal, the final audit report states:

11 The district did not obtain federal approval of its ICRPs for the applicable fiscal  
12 years. We calculated indirect cost rates using the alternate methodology  
13 identified in SCO claiming instructions. This alternate method did not support the  
14 rates that the district claimed; thus, the rates claimed were excessive.

15 This statement simply asserts that because the District's method was not federally  
16 approved, and the result did not match the Controller's own preferred calculation, then it  
17 must be excessive. This is a restatement of the Controller's conclusion, and is not the  
18 basis for a finding.

19 Unclaimed Costs

20 The final audit report concludes that the District failed to claim \$6,515 for FY  
21 2002-03, \$20,662 for FY 2003-04, \$18,431 for FY 2004-05, and \$49,210 for FY 2005-  
22 06. This results in \$94,818 in total unclaimed costs that are due to the District not  
23 applying its indirect cost rate to contract services costs in accordance with the claiming

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1 instructions. Of this amount, \$4,938 is attributed to adjusted indirect costs from Finding  
2 1. However, the final audit report concludes that this amount cannot be paid to the  
3 District because it exceeds the amount originally claimed.

4 The final audit report relies on Government Code Section 17561(d)(3) for the  
5 proposition that “only the total costs included in the initial or amended claim may be  
6 reimbursed within one year of the filing deadline.” However, Government Code Section  
7 17561(d)(2), as amended by Statutes of 2002, Chapter 1124<sup>2</sup>, effective September 30,  
8 2002, states:

9  
10 [T]he Controller (A) may audit the records of any local agency or school district to  
11 verify the actual amount of the mandated costs . . . and (C) shall adjust the  
12 payment to correct for any underpayments or overpayments which occurred in  
13 previous fiscal years.

14 The use of the word “shall” makes the adjustment of *both* underpayments and  
15 overpayments mandatory. Thus, the Controller does not have the discretion to  
16 unilaterally determine that it will require reimbursement for audit adjustments in favor of  
17 the State and simply ignore audit adjustments in favor of the claimants. The Controller,  
18 therefore, has the obligation to pay claimants any unclaimed allowable mandate cost it  
19 discovers as the result of an audit.

20 In addition to being contrary to statutory law, the Controller's position is also  
21 inconsistent. The final audit report indicates that the adjustment from Finding 1 was

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<sup>2</sup> There have been subsequent technical amendments to this code section. However, this is the version that was in effect at the time the annual reimbursement claims that are the subject of this Incorrect Reduction Claim were filed.

1 mitigated by \$3,159 attributed to the District's understated productive hourly rate for FY  
2 2004-05. There is no practical difference between allowing an understated cost to  
3 mitigate one of the Controller's adjustments and reimbursing the District for their total  
4 actual costs. In both instances the District is being reimbursed for its expenses that  
5 were not initially claimed, but were discovered as a result of the audit. The Controller  
6 has chosen to reimburse the District for an understated cost associated with Finding 1,  
7 but not the understated costs for Finding 3. The Controller's position on the  
8 reimbursement of understated costs is inconsistent and therefore arbitrary and  
9 unsupportable. The Controller is obligated by statute and logic to reimburse the District  
10 for the understated costs found in Finding 3 of the final audit report.

11 PART VIII. RELIEF REQUESTED

12 The District filed its annual reimbursement claims within the time limits  
13 prescribed by the Government Code. The amounts claimed by the District for  
14 reimbursement of the costs of implementing the program imposed by Chapter 961,  
15 Statutes of 1975 (the "Rodda Act"), and Chapter 10.7, Division 4, of Title 1 of the  
16 Government Code (commencing with Section 3540), represent the actual costs incurred  
17 by the District to carry out this program. These costs were properly claimed pursuant to  
18 the Commission's Parameters and Guidelines. Reimbursement of these costs is  
19 required under Article XIII B, Section 6 of the California Constitution. The Controller  
20 denied reimbursement without any basis in law or fact. The District has met its burden  
21 of going forward on this claim by complying with the requirements of Section 1185, Title

**Incorrect Reduction Claim of Sierra Joint Community College District  
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1 2, California Code of Regulations. Because the Controller has enforced and is seeking  
2 to enforce these adjustments without benefit of statute or regulation, the burden of  
3 proof is now upon the Controller to establish a legal basis for its actions.

4 The District requests that the Commission make findings of fact and law on each  
5 and every adjustment made by the Controller and each and every procedural and  
6 jurisdictional issue raised in this claim, and order the Controller to correct its audit report  
7 findings therefrom.

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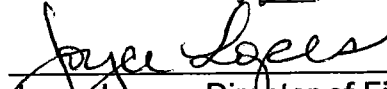
Incorrect Reduction Claim of Sierra Joint Community College District  
961/75 Collective Bargaining

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PART IX. CERTIFICATION

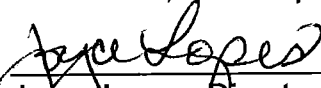
By my signature below, I hereby declare, under penalty of perjury under the laws of the State of California, that the information in this incorrect reduction claim submission is true and complete to the best of my own knowledge or information or belief, and that the attached documents are true and correct copies of documents received from or sent by the state agency which originated the document.

Executed on July 21, 2009, at Rocklin, California, by

  
\_\_\_\_\_  
Joyce Lopes, Director of Finance  
Sierra Joint Community College District  
5000 Rocklin Road  
Rocklin, CA 95677  
Voice: 916-789-2658  
Fax: 916-781-0455  
E-mail: jlopes@sierracollege.edu

APPOINTMENT OF REPRESENTATIVE

Sierra Joint Community College District appoints Keith B. Petersen, SixTen and Associates, as its representative for this incorrect reduction claim.

  
\_\_\_\_\_  
Joyce Lopes, Director of Finance  
Sierra Joint Community College District

7/21/9  
\_\_\_\_\_  
Date

Attachments:

Exhibit "A"	Controller's "results of review" letter dated May 2, 2009
Exhibit "B"	Parameter's and Guidelines as amended January 27, 2000
Exhibit "C"	Controller's Claiming Instructions revised September 2003
Exhibit "D"	Controller's Audit Report dated April 17, 2009
Exhibit "E"	Annual Reimbursement Claims



Exhibit A



**JOHN CHIANG**  
**California State Controller**  
**Division of Accounting and Reporting**  
**MAY 2, 2009**

CC31090  
 00232  
 2009/05/02

BOARD OF TRUSTEES  
 SIERRA JOINT COMM COLL DIST  
 PLACER COUNTY  
 5000 ROCKLIN RD  
 ROCKLIN CA 95677

*Liz,  
 Fyl.  
 Jace*

DEAR CLAIMANT:

RE: COLLECTIVE BARGAINING (CC)

WE HAVE REVIEWED YOUR 2002/2003 FISCAL YEAR REIMBURSEMENT CLAIM FOR THE MANDATED COST PROGRAM REFERENCED ABOVE. THE RESULTS OF OUR REVIEW ARE AS FOLLOWS:

AMOUNT CLAIMED		322,166.00
TOTAL ADJUSTMENTS (DETAILS BELOW)	-	17,971.00
TOTAL PRIOR PAYMENTS (DETAILS BELOW)		-322,166.00
AMOUNT DUE STATE	\$	<u>17,971.00</u>

PLEASE REMIT A WARRANT IN THE AMOUNT OF \$ 17,971.00 WITHIN 30 DAYS FROM THE DATE OF THIS LETTER, PAYABLE TO THE STATE CONTROLLER'S OFFICE, DIVISION OF ACCOUNTING AND REPORTING, P.O. BOX 942850, SACRAMENTO, CA 94250-5875 WITH A COPY OF THIS LETTER. FAILURE TO REMIT THE AMOUNT DUE WILL RESULT IN OUR OFFICE PROCEEDING TO OFFSET THE AMOUNT FROM THE NEXT PAYMENTS DUE TO YOUR AGENCY FOR STATE MANDATED COST PROGRAMS.

IF YOU HAVE ANY QUESTIONS, PLEASE CONTACT GHEN CARLOS AT (916) 324-2341 OR IN WRITING AT THE ABOVE ADDRESS.

ADJUSTMENT TO CLAIM:		
FIELD AUDIT FINDINGS	-	17,971.00
TOTAL ADJUSTMENTS	-	17,971.00
PRIOR PAYMENTS:		
SCHEDULE NO. MA62182A		
PAID 10-30-2006		
TOTAL PRIOR PAYMENTS	-322,166.00	-322,166.00

SINCERELY,

*Ginny Drummels*  
 GINNY DRUMMELS, MANAGER

Exhibit B

BEFORE THE  
COMMISSION ON STATE MANDATES  
STATE OF CALIFORNIA

IN RE AMENDMENT TO PARAMETERS  
AND GUIDELINES ON:

Statutes of 1975, Chapter 961 and  
Statutes of 1991, Chapter 1213

Filed on March 4, 1999;

By Santa Ana Unified School District and  
Stockton Unified School District,  
Co-Claimants.

NO. CSM-98-4425-PGA-12

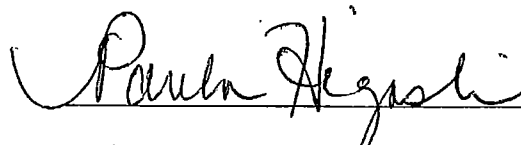
*Collective Bargaining/Collective Bargaining  
Agreement Disclosure*

ADOPTION OF AMENDMENT TO  
PARAMETERS AND GUIDELINES  
PURSUANT TO GOVERNMENT CODE  
SECTION 17557 AND TITLE 2,  
CALIFORNIA CODE OF  
REGULATIONS, SECTIONS 1183.2.

(Adopted on January 27, 2000)

PARAMETERS AND GUIDELINES AMENDMENT

On January 27, 2000, the Commission on State Mandates adopted the attached Amended Parameters and Guidelines. This Decision shall become effective on January 28, 2000.



Paula Higashi, Executive Director

Adopted: October 22, 1980  
Amendments Adopted: 8/ 19/8 1  
(Amendments applicable only to claims for costs incurred  
after June 30, 1981)  
Amended: 3/17/83  
Amended: 9/29/83  
Amended: 12/15/83  
Amended: 6/27/85  
Amended: 10/20/88  
Amended: 7/22/93  
Amended: 8/20/98  
Amended: 1/27/00  
f:\mandates\1998\pga\pga-12\pgfinal.doc  
Document Date: December 1, 1999

PROPOSED AMENDMENT  
TO  
CONSOLIDATED PARAMETERS AND GUIDELINES

Chapter 961, Statutes of 1975  
Chapter 12 13, Statutes of 1991

Collective Bargaining  
and  
Collective Bargaining Agreement Disclosure

An act to repeal Article 5 (commencing with Section 13080) of Chapter 1 of Division 10 of the Education Code, and to add Chapter 10.7 (commencing with Section 3540) to Division 4 of Title 1 of the Government Code, relating to public educational employment relations, and making an appropriation. This bill, which was operative July 1, 1976, repealed the Winton Act and enacted provisions to meet and negotiate, thereby creating a collective bargaining atmosphere for public school employers. Chapter 1213, Statutes of 1991 added section 3547.5 to the Government Code. Government Code section 3547.5 requires school districts to publicly disclose major provisions of a collective bargaining agreement after negotiations, but before the agreement becomes binding.

A. Operative Date of Mandate

The provisions relating to the creation, certain duties of, and appropriations for the Public Employment Relations Board were operative on January 1, 1976. The provisions relating to the organizational rights of employees, the representational rights of employee organizations, the recognition of exclusive representatives, and related procedures were operative on April 1, 1976. The balance of the added provisions were operative on July 1, 1976.

The provisions relating to Collective Bargaining Agreement Disclosure added by Chapter 12 13, Statutes of 1991 were operative on January 1, 1992. The California Department of Education issued Management Advisory 92-01 dated May 15, 1992, to establish the public disclosure format for school district compliance with the test claim statute.

B. Period of Claim

Only costs incurred after January 1, 1978 may be claimed. The initial claim should have included all costs incurred for that portion of the fiscal year from January 1, 1978, to June 30, 1978.

Pursuant to language included in the 1980-81 budget, claims shall no longer be accepted for this period. All subsequent fiscal year claims should be filed with the State Controller's Office for processing.

The test claim on Chapter 12 13, Statutes of 1991 was filed with the Commission on December 29, 1997. Accordingly, the period of reimbursement for the provisions relating to disclosure begins July 1, 1996. Only disclosure costs incurred after July 1, 1996 may be claimed.

C. Mandated Cost

Public school employers have incurred costs by complying with the requirements of Section 3540 through 3549.1 established by Chapter 961, Statutes of 1975. In addition, some costs have been incurred as a result of compliance with regulations promulgated by the Public Employment Relations Board (PERB). Since these activity costs (referred to collectively as "Rodda Act" activities and costs in this document), in many respects, simply implement the original legislation, it is intended that these parameters and guidelines have embodied those regulations or actions taken by PERB prior to December 31, 1978.

D. County Superintendent of Schools Filing

If the County Superintendent of Schools files a claim on behalf of more than one school district, the costs of the individual school district must be shown separately.

E. Governing Authority

The costs for salaries and expenses of the governing authority, for example the School Superintendent and Governing Board, are not reimbursable. These are costs of general government as described by the federal guideline entitled "Cost Principles and Procedures for Establishing Cost Allocation Plans and Indirect Cost Rates for Grants and Contracts with the Federal Government," ASMB C-10.

F. Certification

The following certification must accompany all claims:

I DO HEREBY CERTIFY:

THAT Section 1090 to 1096, inclusive, of the Government Code and other applicable provisions of the law have been complied with; and

THAT I am the person authorized by the local agency to file claim for funds with the State of California.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Title

\_\_\_\_\_  
Telephone Number

G. Claim Components (Reimbursable Costs)

Reimbursable activities mandated by Chapter 961, Statutes of 1975 and Chapter 12 13, Statutes of 1991 are grouped into seven components, G1 through G7. The cost of activities grouped in components G1, G2, and G3 are subject to offset by the historic cost of similar Winton Act activities as described in H2.

1. Determination of appropriate bargaining units for representation and determination of the exclusive representatives.
  - a. Unit Determination: Explain the process for determining the composition of the certificated employee council under the Winton Act, and the process for determining appropriate bargaining units including the determination of management, supervisory and confidential employees, under Chapter 961, Statutes of 1975, if such activities were performed during the fiscal year being claimed.
  - b. Determination of the Exclusive Representative: Costs may include receipt and posting of the representation and decertification notices and, if necessary, adjudication of such matters before the PERB .

- c. Show the actual increased costs including salaries and benefits for employer representatives and/or necessary costs for contracted services for the following functions:
- (1) Development of proposed lists for unit determination hearings if done during the fiscal year being claimed. Salaries and benefits must be shown as described in Item H3.
  - (2) Representation of the public school employer at PERB hearings to determine bargaining units and the exclusive representative. Actual preparation time will be reimbursed. Salaries and benefits must be shown as described in Item H3.
  - (3) If contracted services are used for either (a) or (b) above, contract invoices must be submitted with the claim. Contract costs must be shown as described in Item H5.
  - (4) Indicate the cost of substitutes for release time for employer and exclusive bargaining unit witnesses who testify at PERB hearings. The job classification of the witnesses and the date they were absent must also be submitted. Release time for employee witnesses asked to attend the PERB hearing by bargaining units will not be reimbursed.
  - (5) Identify the travel costs for employer representatives to any PERB hearing. Reimbursement shall reflect the rate specified by the regulations governing employees of the local public school employer.
  - (6) Cost of preparation for one transcript per PERB hearing will be reimbursed.
2. Elections and decertification elections of unit representatives are reimbursable in the event the Public Employment Relations Board determines that a question of representation exists and orders an election held by secret ballot.
- a. Submit with your claim any Public Employment Relations Board agreements or orders which state how the election must be held.
  - b. If a precinct voting list was required by PERB, indicate the cost of its development. Salaries and benefits must be shown as described in Item H3.
  - c. The salary and benefits of a school employer representative, if required by PERB for time spent observing the counting of ballots, will be



reimbursed. The representatives' salary must be shown as described in Item H3.

3. Negotiations : Reimbursable functions include -- receipt of exclusive representative's initial contract proposal, holding of public hearings, providing a reasonable number of copies of the employer's proposed contract to the public, development and presentation of the initial district contract proposal, negotiation of the contract, reproduction and distribution of the final contract agreement.
  - a. Show the costs of salaries and benefits for employer representatives participating in negotiations. Contracted services will be reimbursed. Costs for maximum of five public school employer representatives per unit, per negotiation session will be reimbursed. Salaries and benefits must be shown as described on Page 7, Item H3.
  - b. Show the costs of salaries and benefits for employer representatives and employees participating in negotiation planning sessions. Contracted services for employer representatives will be reimbursed. Salaries and benefits must be shown as described in Item H3.
  - c. Indicate the cost of substitutes for release time of exclusive bargaining unit representatives during negotiations. Give the job classification of the bargaining unit representative that required a substitute and dates the substitute worked. Substitute costs for a maximum of five representatives per unit, per negotiation session will be reimbursed. The salaries of union representatives are not reimbursable.
  - d. Reasonable costs of reproduction for a copy of the initial contract proposal and final contract, which is applicable and distributed to each employer representative (i . e . supervisory, management, confidential) and a reasonable number of copies for public information will be reimbursed. Provide detail of costs and/or include invoices. Costs for copies of a final contract provided to collective bargaining unit members are not reimbursable.
  - e. If contract services are used for a. and/or b. above, contract invoices must be submitted. Contract costs must be shown as described in Item H5.
  - f. A list showing the dates of all negotiation sessions held during the fiscal year being claimed must be submitted.

## 4. Impasse Proceedings

## a. Mediation

- (1) Costs for salaries and benefits for employer representative personnel are reimbursable. Contracted services will be reimbursed. Costs for a maximum of five public school employer representatives per mediation session will be reimbursed. Salaries and benefits must be shown as described in Item H3.
- (2) Indicate the costs of substitutes for the release time of exclusive bargaining unit representatives during impasse proceedings. The job classification of the employee witnesses and the date they were absent shall be indicated. Costs for a maximum of five representatives per mediation session will be reimbursed.
- (3) Renting of facilities will be reimbursed.
- (4) Costs of the mediator will not be reimbursed.
- (5) If contract services are used under 1, contract invoices must be submitted with the claim. Contract costs must be shown as described in Item H5.

## b. Fact-finding publication of the findings of the fact-finding panel. (To the extent fact-finding was required under the Winton Act during the 1974-75 fiscal year, costs are not reimbursable.)

- (1) All costs of the school employer panel representative shall be reimbursed. Salaries and benefits must be shown as described in Item H3.
- (2) Fifty percent of the costs mutually incurred by the fact-finding panel shall be reimbursed. This may include substitutes for release time of witnesses during fact-finding proceedings, and the rental of facilities required by the panel.
- (3) Special costs imposed on the public school employer for the development of unique data required by a fact-finding panel will be reimbursed. Describe the special costs and explain why this data would not have been required by a fact-finding panel under the Winton Act. Salaries and benefits must be shown as described in Item H3.

5. Collective Bargaining Agreement Disclosure

Disclosure of collective bargaining agreement after negotiation and *before* adoption by governing body, as required by Government Code section 3547.5 and California State Department of Education Management Advisory 92-01 (or subsequent replacement), attached to the amended Parameters and Guidelines. Procedures or formats which exceed those or which duplicate activities required under any other statute or executive order are not reimbursable under this item.

- a. Prepare the disclosure forms and documents, as specified.
- b. Distribute a copy of the disclosure forms and documents, to board members, along with a copy of the proposed agreement, as specified.
- c. Make a copy of the disclosure forms and documents and of the proposed agreement available to the public, prior to the day of the public meeting, as specified.
- d. Training employer's personnel on preparation of the disclosure forms and documents, as specified.
- e. Supplies and materials necessary to prepare the disclosure forms and documents, as specified.

For 5. a., b., and c., list the date(s) of the public hearing(s) at which the major provisions of the agreement were disclosed in accordance with the requirements of Government Code section 3547.5 and Department of Education Advisory 92-01 (or subsequent replacement).

6. Contract administration and adjudication of contract disputes either by arbitration or litigation. Reimbursable functions include grievances and administration and enforcement of the contract.

- a. Salaries and benefits of employer personnel involved in adjudication of contract disputes. Contracted services will be reimbursed. Salaries and benefits must be shown as described in Item H3.
- b. Indicate substitutes necessary for release time of the representatives of an exclusive bargaining unit during adjudication of contract disputes. The job classification of the employee witnesses and the dates they were absent shall also be indicated.
- c. Reasonable costs incurred for a reasonable number of training sessions held for supervisory and management personnel on contract administration/interpretation of the negotiated contract are reimbursable. Contract interpretations at staff meetings are not reimbursable. Personal development and informational programs, i. e. , classes, conferences, seminars, workshops, and time spent by employees attending such meetings are not reimbursable. Similarly, purchases of books and subscriptions for personal development and information

purposes are not reimbursable. Salaries and benefits must be shown as described in Item H3.

- d. The cost of one transcript per hearing will be reimbursed.
  - e. Reasonable public school employer costs associated with a contract dispute which is litigated are reimbursable, as follows:
    - 1. Reasonable public school employer costs associated with issues of contract disputes which are presented before PERB are reimbursable.
    - 2. Reasonable public school employer cost of litigation as a defendant in the court suit involving contract disputes may be reimbursable.
    - 3. Where the public school employer is the plaintiff in a court suit to appeal a PERB ruling, costs are reimbursable only if the public school employer is the prevailing party (after all appeals, final judgment).
    - 4. No reimbursement is allowed where the public school employer has filed action directly with the courts without first submitting the dispute to PERB, if required.
    - 5. No reimbursement shall be provided for filing of amicus curiae briefs.
  - f. Expert witness fees will be reimbursed if the witness is called by the public school employer.
  - g. Reasonable reproduction costs for copies of a new contract which is required as a result of a dispute will be reimbursed.
  - h. If contract services are used under "a" above, copies of contract invoices must be submitted with your claim. Contract costs must be shown as described in Item H5.
  - i. Public school employer's portion of arbitrators' fees for adjudicating grievances, representing 50 % of costs, will be reimbursed.
7. Unfair labor practice adjudication process and public notice complaints.

- a. Show the actual costs for salaries and benefits of employer representatives. Services contracted by the public school employer are reimbursable. Salaries and benefits must be shown as described in Item H3.
- b. Indicate cost of substitutes for release time for representatives of exclusive bargaining units during adjudication of unfair practice charges.
- c. The cost of one transcript per PERB hearing will be reimbursed.
- d. Reasonable reproduction costs will be reimbursed.
- e. Expert witness fees will be reimbursed if the witness is called by the public school employer.
- f. If contract services are used under "a" above, contract invoices must be submitted. Contract costs must be shown as described in Item H5.
- g. No reimbursement for an appeal of an unfair labor practice decision shall be allowed where the Public Employee Relations Board is the prevailing party.
- h. No reimbursement for filing of amicus curiae briefs shall be allowed.

H. Supporting Data for Claims--Report Format for Submission of Claim.

- 1. Description of the Activity: Follow the outline of the claim components. Cost must be shown separately by component activity. Supply workload data requested as part of the description to support the level of costs claimed. The selection of appropriate statistics is the responsibility of the claimant.
- 2. Quantify "Increased" Costs: Public school employers will be reimbursed for the "increased costs" incurred as a result of compliance with the mandate.
  - a. For component activities G1 , G2, and G3 :
    - 1. Determination of the "increased costs" for each of these three components requires the costs of current year Rodda Act activities to be offset [reduced] by the cost of the base-year Winton Act activities. The Winton Act base-year is generally fiscal year 1974-75.

Winton Act base-year costs are adjusted by the Implicit Price Deflator prior to offset against the current year Rodda Act costs for these three components. The Implicit Price Deflator shall be listed in the annual claiming instructions of the State Controller.

2. The cost of a claimant's current year Rodda Act activities are offset [reduced] by the cost of the base-year Winton Act activities either: by matching each component, when claimants can provide sufficient documentation to segregate each component of the Winton Act base-year activity costs; or, by combining all three components when claimants cannot satisfactorily segregate each component of Winton Act base-year costs.

b. For component activities G4, G6, and G7:

All allowable activity costs for these three Rodda Act components are "increased costs" since there were no similar activities required by the Winton Act; therefore, there is no Winton Act base-year offset to be calculated.

<u>BASE YEAR</u>	<u>ADJUSTMENT</u>
1974-1975	1.490 1979-80 FY
"	1.560 1980-81 FY
"	1.697 1981-82 FY
"	1.777 1982-83 FY
"	1.884 1983-84 FY

3. Salary and Employees' Benefits: Show the classification of the employees involved, amount of time spent, and their hourly rate. The worksheet used to compute the hourly salary rate must be submitted with your claim. Benefits are reimbursable. Actual benefit percent must be itemized. If no itemization is submitted, 21 percent must be used for computation of claim costs. Identify the classification of employees committed to functions required under the Winton Act and those required by Chapter 961, Statutes of 1975.
4. Services and Supplies : Only expenditures which can be identified as a direct cost as a result of the mandate can be claimed.
5. Professional and Consultant Services: Separately show the name of professionals or consultants, specify the functions the consultants performed relative to the mandate, length of appointment, and the itemized costs for such services. Invoices must be submitted as supporting documentation with your claim. The maximum reimbursable fee for contracted services is ~~\$100~~ \$135 per hour. Annual retainer fees shall be no greater than ~~\$100~~ \$135 per hour. Reasonable expenses will also be paid as identified on the monthly billings of consultants. However, travel expenses for consultants and experts (including attorneys) hired by the claimant shall not be reimbursed in an amount higher than that received by State employees, as established under Title 2, Div. 2, Section 700ff, CAC.

6. Allowable Overhead Cost: School districts must use the Form J-380 (or subsequent replacement) non-restrictive indirect cost rate provisionally approved by the California Department of Education.

County Offices of Education must use the Form J-580 (or subsequent replacement) non-restrictive indirect cost rate provisionally approved by the California Department of Education.

Community College Districts must use one of the following three alternatives:

- . A Federally-approved rate based on OMB Circular A-2 1;
- z The State Controller's FAM-29C which uses the CCFS-3 11; or
- . Seven percent (7%).

Exhibit C



## Collective Bargaining

### 1. Summary of Chapters 961/75 and 1213/91

The Rodda Act repealed Education Code Article 5 (commencing with § 13080), of Chapter 1 of Division 10 and added Chapter 10.7 (commencing with § 3540) to Division 4 of Title 1 of the Government Code, relating to public educational employment relations.

The Rodda Act, which became operative July 1, 1976, repealed the Winton Act and enacted provisions requiring the employer and employee to meet and negotiate, thereby creating a collective bargaining atmosphere for public school employers. It also established the Public Employment Relations Board (PERB). PERB is responsible for issuing formal interpretations and rulings regarding collective bargaining under the Rodda Act.

Government Code Section 3547.5 as added by Chapter 1213, Statutes of 1991, requires school districts to publicly disclose major provisions of a collective bargaining agreement after negotiations but before the agreement becomes binding.

On July 17, 1978, the Commission on State Mandates (COSM), (formerly Board of Control) determined that Chapter 961, Statutes of 1975, resulted in state mandated costs that are reimbursable pursuant to Part 7 (commencing with Government Code § 17500) of Division 4 of Title 2.

On August 20, 1998, COSM determined that Chapter 1213, Statutes of 1991, resulted in state mandated costs that are reimbursable pursuant to Part 7 (commencing with Government Code § 17500) of Division 4 of Title 2.

### 2. Eligible Claimants

Any school district (K-12), county office of education, or community college district that incurs increased costs as a direct result of this mandate is eligible to claim reimbursement of these costs.

### 3. Appropriations

These claiming instructions are issued following the adoption of the amended parameters and guidelines by COSM. To determine if this program is funded in subsequent fiscal years, refer to the schedule "Appropriation for State Mandated Cost Programs" in the *Annual Claiming Instructions for State Mandated Costs* issued in October of each year to county superintendents of schools and superintendents of schools.

### 4. Types of Claims

#### A. Reimbursement and Estimated Claims

A claimant may file a reimbursement and/or an estimated claim. A reimbursement claim details the costs actually incurred for a prior year. An estimated claim shows the costs to be incurred for the current fiscal year.

#### B. Minimum Claim

Section 17564(a) of the Government Code provides that no claim shall be filed pursuant to Section 17561 unless such a claim exceeds \$200 per program per fiscal year. However, any county superintendent of schools, as fiscal agent for the school districts, may submit a combined claim in excess of \$200 on behalf of districts within the county even if an individual district's claim does not exceed \$200. A combined claim must show the individual claim costs for each district. Once a combined claim is filed, all subsequent fiscal years relating to the same mandate must be filed in a combined form. The county superintendent receives the reimbursement payment and is responsible for disbursing funds to each participating school district. A school district may

withdraw from the combined claim form by providing a written notice of its intent to file a separate claim to the county superintendent of schools and the State Controller's Office at least 180 days prior to the deadline for filing the claim.

#### 5. Filing Deadline

- A. Initial Claims-** -County offices of education and school districts that submitted 1998-99 fiscal year claims for professional and consultant services at the \$100 per hour rate may amend their claims to be reimbursed at the \$135 per hour rate.

Pursuant to Government Code Section 17561, Subdivision (d)(1)(A), initial claims must be filed within 120 days from the issuance date of claiming instructions. Accordingly:

- (1) Amended reimbursement claims for the 1998-99 fiscal year must be filed with the State Controller's Office and postmarked by August 3, 2000. If the amended reimbursement claim is filed after the deadline of August 3, 2000, the approved amount of the difference between the \$100 and \$135 rate change must be reduced by a late penalty of 10%, not to exceed \$1,000. Claims filed more than one year after the deadline will not be accepted.
- (2) An amended 1999-00 estimated claim for professional and consultant services at the \$135 per hour rate may be filed with the State Controller's Office and postmarked by August 3, 2000. Timely filed amended estimated claims will be paid before late claims.

#### B. Annually Thereafter

Refer to the item "Reimbursable State Mandated Cost Programs" contained in the cover letter for mandated cost programs issued annually in October that identifies the fiscal years for which claims may be filed. If an "x" is shown for the program listed under "19\_\_/19\_\_ Reimbursement Claim" and/or "19\_\_/20\_\_ Estimated Claim," claims may be filed as follows:

- (1) An estimated claim filed with the State Controller's Office must be postmarked by January 15 of the fiscal year in which costs will be incurred. Timely filed estimated claims will be paid before late claims.

After having received payment for an estimated claim, the claimant must file a reimbursement claim by January 15 of the following fiscal year. If the school district fails to file a reimbursement claim, monies received for the estimated claim must be returned to the State. If no estimated claim was filed, the school district may file a reimbursement claim detailing the actual costs incurred for the fiscal year, provided there was an appropriation for the program for that fiscal year. For information regarding appropriations for reimbursement claims, refer to the "Appropriation for State Mandated Cost Programs" in the previous fiscal year's annual claiming instructions.

- (2) A reimbursement claim detailing the actual costs must be filed with the State Controller's Office and postmarked by January 15 following the fiscal year in which costs will be incurred. If the claim is filed after the deadline but by January 15 of the succeeding fiscal year, the approved claim must be reduced by a late penalty of 10%, not to exceed \$1,000. Claims filed more than one year after the deadline will not be accepted.

#### 6. Reimbursable Activities

The objective of the reporting forms is to determine the Rodda Act costs incurred during the current year and compare them with the adjusted costs incurred in the base year under the Winton Act. The first three claim components listed below apply to both the Winton Act and Rodda Act. Components D through F, which apply to the Rodda Act, represent activities that were not required under the Winton Act.

**A. Determining Bargaining Units and Exclusive Representation**

The cost of determining appropriate bargaining units, exclusive representation and representatives are reimbursable. Activities determined to be eligible reimbursements for this component are as follows:

**(1) Bargaining Unit Lists**

Development of proposed lists for the bargaining unit determination hearings.

(a) Contract services necessary for development of proposed lists.

(b) Salaries and benefits of district employees and related costs necessary to develop proposed lists.

**(2) PERB Hearings**

Representation costs for the school employer at PERB hearings held to determine the bargaining units and their exclusive representative.

(a) Salaries and benefits of district employees used to prepare for and represent employer at hearings.

(b) Contract services used to prepare for and represent the employer at hearings.

**(3) Substitutes**

The cost of hiring substitutes to replace the employer and exclusive bargaining unit witnesses required to testify at PERB hearings. The claimant must include with the claim, a list of teacher witnesses, their job classifications, and the date they were required to testify.

The cost of substitute release time for employee witnesses asked to attend PERB hearings by bargaining units, but not required to testify, is not eligible for reimbursement in this component.

**(4) Travel**

Travel Expenses incurred by district employer representatives required to attend PERB hearings. Reimbursement shall reflect the rate specified by the regulations governing employees of the local school district. However, the reimbursement cannot exceed the rate adopted by the Board of Control for state employees.

**(5) Transcript**

The cost of preparing one transcript per PERB hearing is reimbursable.

**B. Election of Unit Representation**

The cost of elections and decertification elections of unit representatives is reimbursable in the event PERB determines that a question of representation exists and orders an election held by secret ballot. The claimant must include with the claim, any PERB agreements or orders that state how the election must be held.

Activities eligible for reimbursement for this component are as follows:

**(1) Precinct Voting List**

The salaries, benefits, and related cost of developing and preparing a precinct list, if required by PERB.

**(2) Ballot Tally Observers**

The salary and benefits of a school employer representative, if required by PERB to observe the ballot count.

**C. Cost of Negotiations**

Costs associated with receipt of the exclusive representative's initial contract proposal, holding public hearings, providing a reasonable number of copies of the employer's contract proposal to the public, development and presentation of the initial district contract proposal, negotiation of the contract, reproduction and distribution of the final contract agreement. The claimant must include with the claim, a listing of the dates of all negotiation sessions held during the fiscal year of claim.

Activities determined to be eligible for reimbursement of this component are as follows:

(1) Representative's Contract Proposal

The employer's cost of analyzing the exclusive representative's initial contract proposal.

- (a) Salaries and benefits for public school employer representatives and supporting personnel participating in planning sessions and related contract services.

(2) Public Hearings

The cost of holding public hearings related to the contract negotiations.

(3) Public Distribution of Proposed Contract

The cost of providing a reasonable number of copies of the district's proposed contract to the public.

- (a) Reproduction of copies of the initial contract proposal for the district's supervisory, management, and confidential representatives are reimbursable.
- (b) A reasonable number of copies of the initial contract for distribution to the public is reimbursable.

(4) District Contract Proposal

The cost of employer salaries and benefits necessary for development and presentation of the initial district proposal and related contract services.

(5) Negotiation

The cost of negotiating a contract with the employee representatives.

- (a) Salaries and benefits for district employer representatives participating in negotiations and related contract services. Reimbursable costs for a maximum of five school district representatives per unit per negotiating session will be reimbursed.
- (b) Substitutes hired so that exclusive bargaining unit representatives can attend negotiations. List the job classification of the bargaining unit representative who required a substitute. List the dates and time the substitute worked. Substitute costs for a maximum of five representatives per unit negotiating per session are reimbursable.

(6) Public Distribution of Final Contract

The cost of reproduction of the contract and distribution of the final contract agreement.

- (a) Reproduction of copies of the initial contract for distribution to the district's supervisory, management, and confidential employee representatives.
- (b) A reasonable number of copies of the final contract for purposes of public information.

**The following costs are not eligible for reimbursement of this component:**

- (c) The cost of copies of the final contract provided to the collective bargaining unit members.
- (d) The salaries of union representatives.

**D. Impasse Proceedings**

The cost of impasse proceedings is reimbursable. Activities determined to be reimbursable for this component are as follows:

(1) Mediation

Representation costs for the school employer at mediation sessions are reimbursable.

- (a) Salaries and benefits for district employees to prepare and represent the employer at the sessions. Cost for a maximum of five public school employer representatives per mediation session will be reimbursed.
- (b) Contract services used to prepare for and represent the employer at the sessions.
- (c) The cost of substitutes hired to allow exclusive bargaining unit representatives to attend impasse proceedings. List the job classification of the employee witnesses and the dates and time of their attendance at mediation sessions. Reimbursement to a public school district employer is limited to the cost of hiring a maximum of five substitutes to replace five representatives so they can attend a mediation session.
- (d) The cost of renting facilities for the sessions.
- (e) The cost of the mediator is not eligible for reimbursement.

(2) Fact Finding

The cost of development and publication of the findings of the panel.

- (a) All the costs of the district employer representative serving on the fact-finding panel.
- (b) Fifty percent of the cost of the fact-finding panel mutually incurred by the employer representative and the employee bargaining unit representative. This may include the cost of teacher substitutes so that witnesses can attend fact-finding proceedings and the rental of facilities required to conduct the fact-finding hearing.
- (c) Special costs imposed on the district for the development of unique data required by a fact-finding panel. Describe the special costs and explain why this data would not have been required by a fact-finding panel under the Winton Act.

**E. Collective Bargaining Agreement Disclosure**

Disclosure of collective bargaining agreement *after* the negotiation and *before* adoption by the governing body, as required by Government Code Section 3547.5 and California State Department of Education Management Advisory 92-01 (or subsequent replacement).

- (1) Prepare the disclosure forms and documents.
- (2) Distribute a copy of the disclosure forms and documents to board members with a copy of the proposed agreement.
- (3) Make a copy of the disclosure forms and documents and the proposed agreement available to the public, prior to the day of the public meeting.
- (4) Train employer's personnel to prepare the disclosure forms and documents.
- (5) Materials and supplies necessary to prepare the disclosure forms and documents.

For items (1) through (3) above, list the date(s) of the public hearing(s) at which the major provisions of the agreement were disclosed in accordance with the requirements of Government Code Section 3547.5 and the Department of Education Advisory 92-01 (or subsequent replacement).

Procedures or formats that exceed those or duplicate activities required under any other statute or executive order are not reimbursable under this component.

**F. Contract Administration**

The cost of contract administration and adjudication of contract disputes either by arbitration or litigation is reimbursable.

Activities determined to be reimbursable for this component are as follows:

(1) Training Sessions

Reasonable costs incurred for a reasonable number of training sessions held for supervisory and management personnel regarding contract administration and interpretation of the negotiated contract.

(2) Grievances

(a) Salaries and benefits of public school personnel involved in adjudication of contract disputes along with related contract services.

(b) Substitutes hired so that representatives of an exclusive bargaining unit can attend adjudication hearings regarding contract disputes. List the job classifications of the employee witnesses and the dates and time they were required to attend adjudication hearings.

(c) The cost of one transcript per hearing is reimbursable.

(3) Contract Disputes Presented Before PERB

(a) Public school employer costs regarding contract disputes that are presented before PERB.

(b) Litigation costs incurred by a public school employer as a defendant in a court suit involving contract disputes may be reimbursable. (See (4) "Appeal of PERB Ruling," below, if claimant is the plaintiff).

(c) Expert witness fees if the witness is called by the public school employer.

(d) Reasonable reproduction costs for copies of a new contract that is required as a result of a dispute.

(e) A public school employer's portion of an arbitrator's fees (50% of costs) for adjudicating grievances.

(4) Appeal of PERB Ruling

Reasonable claimant costs associated with a contract dispute are reimbursable when the claimant is the plaintiff in a court suit to appeal a PERB ruling and the claimant is the prevailing party.

(a) The costs incurred become eligible for reimbursement in the fiscal year in which the appeal process has been exhausted.

(b) The claimant must include with the claim a copy of the court's ruling.

(c) If the claim includes costs associated with more than one appeal, the costs associated with each appeal must be shown separately.

No reimbursement is allowed where the public school employer has filed action directly with the courts without first submitting the dispute to PERB, if required.

No reimbursement shall be provided for filing of a brief with the court by a person who is not party to a litigation (i.e., amicus curiae).

**The following costs are not eligible for reimbursement of this component:**

(d) Contract interpretations conducted at staff meetings.

(e) Personal development and informational programs (i.e., classes, conferences, seminars, workshops) and time spent by employees attending such meetings.

- (f) Labor/management non-adversarial training sessions
- (g) Purchase of books and subscriptions for personal development and information purposes.

#### G. Unfair Labor Practice Charges

The cost of unfair labor practice adjudication process and public notice complaints are reimbursable.

Activities determined to be reimbursable for this component are as follows:

##### (1) Unfair Labor Practice Presented to PERB

- (a) Salaries and benefits of public school district representatives and related contract services.
- (b) The cost of substitutes hired to replace representatives of an exclusive bargaining unit required to attend adjudication hearings regarding unfair labor practice charges.
- (c) The cost of a transcript for each PERB hearing.
- (d) Reasonable reproduction costs.
- (e) Expert witness fees if the witness is called by the public school district.

##### (2) Appeal of a PERB Ruling

Claimant costs associated with the appeal of a PERB unfair labor practice decision are reimbursable if the claimant is the prevailing party.

- (a) The costs incurred become eligible for reimbursement in the fiscal year in which the appeal process has been exhausted.
- (b) The claim must include a copy of the court's ruling.
- (c) If the claim includes costs associated with more than one appeal, the costs associated with each appeal must be shown separately.

**The following costs are not eligible for reimbursement of this component:**

- (d) Appeal of an unfair labor practice if PERB is the prevailing party.
- (e) The filing of a brief with the court by a person who is not party to the litigation (i.e., amicus curiae).

### 7. Reimbursement Limitations

#### A. Fringe Benefits

The actual fringe benefit costs may be claimed if supported by an itemized list of the costs, such as for: Retirement, social security, health and dental insurance, workers' compensation, etc.. If no itemization is submitted, twenty one percent of direct salary may be used for computing the fringe benefit costs.

#### B. Contract Services

The contract services guidelines in 8.A.(3) shall prevail, except that the reimbursable fee for collective bargaining contract services will not exceed \$135 per hour. Additionally, annual retainer fees shall be based on a fee not greater than \$135 per hour. The claims that are based on annual retainers shall contain a certification that the fee is no greater than \$135 per hour. Reasonable expenses will also be paid if identified on the monthly billings of consultants. However, travel expenses for consultants and experts (including attorneys) hired by the claimant shall not be reimbursed in an amount higher than that received by state employees as established under Title 2, Division 2, Section 700ff, California Code of Regulations.

**C. Travel Expenses**

Reimbursement of business and travel expenses is limited to an amount and type of that which can be claimed by state employees. Refer to Appendix B, State of California, Travel Expense Guidelines, for current per diem rates.

**D. Other Revenue Sources**

Any offsetting savings or reimbursement the claimant received from any source including, but not limited to, service fees collected, federal funds, and other state funds as a direct result of this mandate shall be identified and deducted so only net local cost is claimed.

**E. Governing Authority**

Salaries and expenses of the governing authority e.g. the Board of Trustees and Superintendent of Schools, are not reimbursable as a direct cost. These are costs of general government as described by the federal guideline "Cost Principles and Procedures for Establishing Cost Allocation Plans and Indirect Cost Rates for Grants and Contracts with the Federal Government," ASMB C-10.

**F. Quantify "Increased" Costs**

Determination of increased costs for each of these components requires the cost of current year Rodda Act activities to be offset (reduced) by the cost of the base year Winton Act activities. The Winton Act base year is generally fiscal year 1974-75.

Winton Act base year costs are adjusted by the Implicit Price Deflator (IPD) prior to offset against the current year Rodda Act costs for claim components, 6.A., 6.B., and 6.C. The IPD shall be listed in the annual claiming instructions.

Base Year	Adjustment	
1974-75	1.490	1979-80 FY
1974-75	1.560	1980-81 FY
1974-75	1.697	1981-82 FY
1974-75	1.777	1982-83 FY

The cost of a claimant's current year Rodda Act activities are offset (reduced) by the cost of the base year Winton Act activities either by matching each component when claimants can provide sufficient documentation to segregate each component of the Winton Act base year activity costs or, by combining all three components when claimant cannot satisfactorily segregate each component of the Winton Act base year costs.

All allowable activity costs for Rodda Act components, 6.D., 6.E., 6.F., and 6.G., are increased costs since there were no similar activities required by the Winton Act; therefore no Winton Act base year offset is to be calculated.

**8. Claiming Forms and Instructions**

The diagram "Illustration of Claim Forms" provides a graphic presentation of forms required to be filed with a claim. A claimant may submit a computer generated report in substitution for forms CB-1 and CB-2 provided the format of the report and data fields contained within the report are identical to the claim forms included in this program. The claim forms provided for this program can be duplicated and used by the claimant to file estimated or reimbursement claims. The State Controller's Office will revise the manual and claim forms as necessary.

**A. Form CB-2, Component/Activity Cost Detail**



This form is used to segregate the detailed costs by claim component. A separate form CB-2 must be completed for each cost component being claimed. Costs reported on this form must be supported as follows:

(1) Salaries and Benefits

Identify the employee(s) and/or show the classification of each employee(s) involved. Describe the mandated functions performed by each employee and specify the actual time spent, the productive hourly rate, and related fringe benefits.

Reimbursement of personnel services includes compensation paid for salaries, wages, and employee fringe benefits. Employee fringe benefits include regular compensation paid to an employee during periods of authorized absences (e.g. annual leave, sick leave) and the employer's contribution to social security, pension plans, insurance, and workers' compensation insurance. Fringe benefits are eligible for reimbursement when distributed equitably to all job activities that the employee performs.

Source documents required to be maintained by the claimant may include, but are not limited to, employee time records that show the employee's actual time spent on this mandate. The worksheet used to compute the hourly salary rate must be submitted with your claim. Actual benefit percent must be itemized. If no itemization is submitted, twenty one percent (21%) must be used for computation of claim costs. Identify the classification of employees committed to functions required under the Winton Act and those required by Chapter 961, Statutes of 1975.

(2) Materials and Supplies

Only expenditures that can be identified as a direct result of this mandate may be claimed. List the cost of materials consumed or expended specifically for the purpose of this mandate. The cost of materials and supplies that are not used exclusively for the mandate is limited to the pro rata portion used to comply with this mandate. Purchases shall be claimed at the actual price after deducting cash discounts, rebates, and allowances received by the claimant. Supplies that are withdrawn from inventory shall be charged based on a recognized method of costing, consistently applied.

Source documents required to be maintained by the claimant may include, but are not limited to, invoices, receipts, purchase orders, and other documents evidencing the validity of the expenditures.

(3) Contract Services

Show the name(s) of professionals or consultants separately, specify the functions performed relative to the mandate, length of appointment, and the itemized costs of such services. Invoices must be submitted as supporting documentation with the claim. The maximum reimbursable fee for contract services is \$135 per hour. Annual retainer fees shall be no greater than \$135 per hour. Reasonable expenses will also be paid as identified on the monthly billings of consultants.

Source documents required to be maintained by the claimant may include, but are not limited to, contracts, invoices, and other documents evidencing the validity of the expenditures.

(4) Travel

Travel expenses for mileage, per diem, lodging, and other employee entitlements are reimbursable in accordance with the rules of the local jurisdiction. Give the name(s) of the traveler(s), purpose of travel, inclusive dates, destination points, and costs.

Source documents may include, but are not limited to, employee travel expense claims, receipts and other documents evidencing the travel expenses.

For audit purposes all supporting documents must be retained for a period of two years after the end of the calendar year in which the reimbursement claim was filed or last amended, whichever is later. Such documents shall be made available to the State Controller's Office on request.

**B. Form CB-1, Claim Summary**

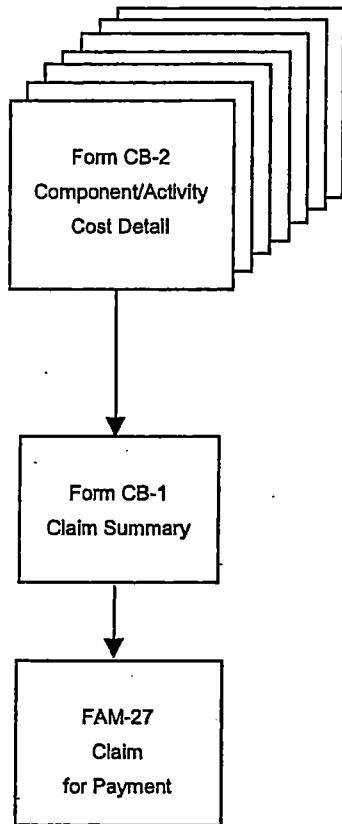
This form is used to summarize direct costs by cost component and compute allowable indirect costs for the mandate. The direct costs summarized on this form are derived from form CB-2 and carried forward to form FAM-27.

School districts and county offices of education may compute the amount of indirect costs utilizing the State Department of Education's Annual Program Cost Data Report J-380 or J-580 rate, as applicable. Community college districts must use one of the following three alternatives: A federally approved rate based on OMB Circular A-21; the State Controller's FAM-29C that utilizes CCFS-311.

**C. Form FAM-27, Claim for Payment**

This form contains a certification that must be signed by an authorized officer of the school district. All applicable information from form CB-1 must be carried forward to this form in order for the State Controller's Office to process the claim for payment.

Illustration of Forms



**Form CB-2, Component/Activity Cost Detail**  
Complete a separate form CB-2 for each cost component claimed.

**A. Determining Bargaining Units and Exclusive Representation**

- (1) Bargaining Unit Lists
- (2) PERB Hearings
- (3) Substitutes
- (4) Travel Costs
- (5) Transcripts

**B. Election of Unit Representation**

- (1) Precinct Voting List
- (2) Ballot Tally Observers

**C. Cost of Negotiations**

- (1) Representative's Contract Proposal
- (2) Public Hearings
- (3) Public Distribution of Proposed Contract
- (4) District Contract Proposal
- (5) Negotiation
- (6) Public Distribution of Final Contract

**D. Impasse Proceedings**

- (1) Mediation
- (2) Fact Finding

**E. Collective Bargaining Agreement Disclosure**

- (1) Prepare Disclosure Forms and Documents
- (2) Distribute Forms and Documents
- (3) Copy Forms and Documents
- (4) Train Employer's Personnel
- (5) Purchase Necessary Supplies

**F. Contract Administration**

- (1) Training Sessions
- (2) Grievances
- (3) Contract Disputes Presented to PERB
- (4) Appeal of a PERB Ruling

**G. Unfair Labor Practice Charges**

- (1) Unfair Labor Practice Presented to PERB
- (2) Appeal of a PERB Ruling

<b>CLAIM FOR PAYMENT</b> Pursuant to Government Code Section 17561  <b>COLLECTIVE BARGAINING</b>	For State Controller Use Only (19) Program Number 00011 (20) Date Filed ___/___/___ (21) LRS Input ___/___/___	Program <b>011</b>
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LABEL HERE	(01) Claimant Identification Number	<b>Reimbursement Claim Data</b>	
	(02) Claimant Name	(22) CB-1, (03)(1)(e)	
	County of Location	(23) CB-1, (03)(2)(e)	
	Street Address or P.O. Box <span style="float: right;">Suite</span>	(24) CB-1, (03)(3)(e)	
	City <span style="float: right;">State Zip Code</span>	(25) CB-1, (03)(4)(e)	

Type of Claim	Estimated Claim	Reimbursement Claim	
(03) Estimated <input type="checkbox"/>	(09) Reimbursement <input type="checkbox"/>	(26) CB-1, (03)(5)(e)	
(04) Combined <input type="checkbox"/>	(10) Combined <input type="checkbox"/>	(27) CB-1, (03)(6)(e)	
(05) Amended <input type="checkbox"/>	(11) Amended <input type="checkbox"/>	(28) CB-1, (03)(7)(e)	
		(29) CB-1, (04)(d)	
<b>Fiscal Year of Cost</b>	(06) <b>20</b> / <b>20</b>	(12) <b>20</b> / <b>20</b>	(30) CB-1, (04)(e)
<b>Total Claimed Amount</b>	(07)	(13)	(31) CB-1, (05)(e)
<b>Less: 10% Late Penalty, not to exceed \$1,000</b>		(14)	(32)
<b>Less: Prior Claim Payment Received</b>		(15)	(33)
<b>Net Claimed Amount</b>		(16)	(34)
<b>Due to Claimant</b>	(08)	(17)	(35)
<b>Due to State</b>		(18)	(36)

**(37) CERTIFICATION OF CLAIM**

In accordance with the provisions of Government Code § 17561, I certify that I am the officer authorized by the local agency to file claims with the State of California for costs mandated by Chapter 961, Statutes of 1975, and Chapter 1213, Statutes of 1991, and certify under penalty of perjury that I have not violated any of the provisions of Government Code Sections 1090 to 1096, inclusive.

I further certify that there was no application other than from the claimant, nor any grant or payment received, for reimbursement of costs claimed herein; and such costs are for a new program or increased level of services of an existing program mandated by Chapter 961, Statutes of 1975, and Chapter 1213, Statutes of 1991.

The amounts for Estimated Claim and/or Reimbursement Claim are hereby claimed from the State for payment of estimated and/or actual costs for the mandated program of Chapter 961, Statutes of 1975, and Chapter 1213, Statutes of 1991, set forth on the attached statements.

Signature of Authorized Officer	Date

Type or Print Name	Title
(38) Name of Contact Person for Claim	Telephone Number ( ) - Ext.
E-Mail Address	

Program <b>011</b>	<b>COLLECTIVE BARGAINING</b> <b>Certification Claim Form</b> <b>Instructions</b>	<b>FORM</b> <b>FAM-27</b>
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- (01) Leave blank.
- (02) A set of mailing labels with the claimant's I.D. number and address was enclosed with the letter regarding the claiming instructions. The mailing labels are designed to speed processing and prevent common errors that delay payment. Affix a label in the space shown on form FAM-27. Cross out any errors and print the correct information on the label. Add any missing address items, except county of location and a person's name. If you did not receive labels, print or type your agency's mailing address.
- (03) If filing an original estimated claim, enter an "X" in the box on line (03), Estimated.
- (04) If filing an original estimated claim on behalf of districts within the county, enter an "X" in the box on line (04), Combined.
- (05) If filing an amended or combined claim, enter an "X" in the box on line (05), Amended. Leave boxes (03) and (04) blank.
- (06) Enter the fiscal year in which costs are to be incurred.
- (07) Enter the amount of estimated claim. If the estimate exceeds the previous year's actual costs by more than 10%, complete form CB-1 and enter the amount from line (16).
- (08) Enter the same amount as shown on line (07).
- (09) If filing an original reimbursement claim, enter an "X" in the box on line (09), Reimbursement.
- (10) If filing an original reimbursement claim on behalf of districts within the county, enter an "X" in the box on line (10), Combined.
- (11) If filing an amended or a combined claim on behalf of districts within the county, enter an "X" in the box on line (11), Amended.
- (12) Enter the fiscal year for which actual costs are being claimed. If actual costs for more than one fiscal year are being claimed, complete a separate form FAM-27 for each fiscal year.
- (13) Enter the amount of reimbursement claim from form CB-1, line (16).
- (14) Reimbursement claims must be filed by January 15 of the following fiscal year in which costs were incurred or the claims shall be reduced by a late penalty. Enter either the product of multiplying line (13) by the factor 0.10 (10% penalty) or \$1,000, whichever is less.
- (15) If filing a reimbursement claim and a claim was previously filed for the same fiscal year, enter the amount received for the claim. Otherwise, enter a zero.
- (16) Enter the result of subtracting line (14) and line (15) from line (13).
- (17) If line (16), Net Claimed Amount, is positive, enter that amount on line (17), Due from State.
- (18) If line (16), Net Claimed Amount, is negative, enter that amount in line (18), Due to State.
- (19) to (21) Leave blank.
- (22) to (36) Reimbursement Claim Data. Bring forward the cost information as specified on the left-hand column of lines (22) through (36) for the reimbursement claim, e.g., CB-1, (03)(1)(e), means the information is located on form CB-1, block (03), line (1), column (e). Enter the information on the same line but in the right-hand column. Cost information should be rounded to the nearest dollar, i.e., no cents. Indirect costs percentage should be shown as a whole number and without the percent symbol, i.e., 7.548% should be shown as 8. **Completion of this data block will expedite the payment process.**
- (37) Read the statement "Certification of Claim." If it is true, the claim must be dated, signed by the agency's authorized officer, and must include the person's name and title, typed or printed. **Claims cannot be paid unless accompanied by a signed certification.**
- (38) Enter the name, telephone number, and e-mail address of the person whom this office should contact if additional information is required.

**SUBMIT A SIGNED, ORIGINAL FORM FAM-27 WITH ALL OTHER FORMS AND SUPPORTING DOCUMENTS (NO COPIES NECESSARY) TO:**

*Address, if delivered by U.S. Postal Service:*

OFFICE OF THE STATE CONTROLLER  
 ATTN: Local Reimbursements Section  
 Division of Accounting and Reporting  
 P.O. Box 942850  
 Sacramento, CA 94250

*Address, if delivered by other delivery service:*

OFFICE OF THE STATE CONTROLLER  
 ATTN: Local Reimbursements Section  
 Division of Accounting and Reporting  
 3301 C Street, Suite 500  
 Sacramento, CA 95816

<b>Program</b> <b>011</b>	<b>MANDATED COSTS COLLECTIVE BARGAINING CLAIM SUMMARY</b>	<b>FORM CB-1</b>
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(01) Claimant	(02) Type of Claim Reimbursement <input type="checkbox"/> Estimated <input type="checkbox"/>	Fiscal Year 20__/20__
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Rodda Act Direct Costs	Cost Elements				
(03) Reimbursable Components	(a) Salaries and Benefits	(b) Materials and Supplies	(c) Travel	(d) Contract Services	(e) Total
1. Determining Bargaining Units and Exclusive Representation					
2. Election of Unit Representation					
3. Cost of Negotiations					
4. Impasse Proceedings					
5. Collective Bargaining Agreement Disclosure					
6. Contract Administration					
7. Unfair Labor Practice Charges					
(04) Total Rodda Act Direct Costs					

<b>Winton Act Direct Costs</b>					
(05) Base Year, 1974-75 Direct Costs					
(06) Base Year Direct Costs Adjusted by IPD					[Line (05)(e) x 3.291 for 2002-03 F.Y.]
(07) Increased Direct Costs					[Line (04)(e) - line (06)]

<b>Indirect Costs</b>					
(08) Total Rodda Act Direct Costs less Contract Services					[Line (04)(e) - line (04)(d)]
(09) Base Year Costs less Contract Services adjusted by IPD					[Line (05)(e) - line (05)(d)] x 3.291
(10) Increased Direct Costs less Contract Services					[Line (08) - line (09)]
(11) Indirect Cost Rate					From J-380, J-580, or FAM-27C %
(12) Increased Indirect Costs					[Line (10) x line (11)]
(13) Total Increased Direct and Indirect Costs					[Line (07) + line (12)]

<b>Cost Reduction</b>					
(14) Less: Offsetting Savings					
(15) Less: Other Reimbursements					
(16) Total Claimed Amount					[Line (13) - (line (14) + line (15))]

<b>Program</b>  <b>011</b>	<b>COLLECTIVE BARGAINING</b> <b>CLAIM SUMMARY</b> <b>Instructions</b>	<b>FORM</b> <b>CB-1</b>
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- (01) Enter the name of the claimant.
- (02) Type of Claim. Check a box, Reimbursement or Estimated, to identify the type of claim being filed. Enter the fiscal year for which costs were incurred or are to be incurred.  
 Form CB-1 must be filed for a reimbursement claim. Do not complete form CB-1 if you are filing an estimated claim and the estimate does not exceed the previous fiscal year's actual costs by more than 10%. Simply enter the amount of the estimated claim on form FAM-27, line (07). However, if the estimated claim exceeds the previous fiscal year's actual costs by more than 10%, form CB-1 must be completed and a statement attached explaining the increased costs. Without this information the high estimated claim will automatically be reduced to 110% of the previous fiscal year's actual costs.
- (03) For each of the reimbursable components, enter the total allowable cost from form CB-2, line (05), columns (d) through (g) onto form CB-1, block (03), lines (1) through (7), columns (a) through (d). Total each line and enter in column (e).
- (04) Add columns (03)(d) and (e) for Cost Elements, and enter the totals on this line.
- (05) Method A. Enter the 1974-75 Winton Act (base year ) costs on line (05)(e). Enter on line (05)(d) any contract service costs included in line (05)(e).  
 Method B. Enter the amount from form CB-1.1, line (04)(b) onto line (05)(e). Enter on line (05)(d) any contract service costs included in line (05)(e).
- (06) Method A. Multiply the base year cost on line (05)(e) by the implicit price deflator (IPD). The 2002-03 IPD is 3.291.  
 Method B. Enter the amount from form CB-1.1, line (04)(d).
- (07) Subtract the Base Year Direct Costs Adjusted by the IPD, line (06), from Total Rodda Act Direct Cost, line (04)(e).
- (08) Subtract Total Contract Services, line (04)(d), from Total Rodda Act Direct Costs, line (04)(e).
- (09) Subtract Base Year Contract Services, line (05)(d), from Base Year, 1974-75 Direct Costs, line (05)(e), and multiply the remainder by the IPD.
- (10) Subtract Base Year Costs less Contract Services adjusted by the IPD, line (09), from Total Rodda Act Direct Costs less Contract Services, line (08).
- (11) Enter the indirect cost rate. School districts (K-12) may compute the amount of indirect costs to claim by multiplying their total direct costs by the State Department of Education forms J-380 or J-580 rate applicable to the fiscal year of costs. Community college districts may use the federally approved OMB A-21 rate, or the rate computed using form FAM-29C.
- (12) Multiply Incremental Direct Costs less Contract Services, line (10), by Indirect Cost Rate, line (11).
- (13) Enter the sum of Incremental Costs, line (07), and Incremental Indirect Costs, line (12).
- (14) Less: Offsetting Savings. If applicable, enter the total savings experienced by the claimant as a direct result of this mandate. Submit a detailed schedule of savings with the claim.
- (15) Less: Other Reimbursements. If applicable, enter the amount of other reimbursements received from any source including, but not limited to, service fees collected, federal funds, and other state funds, which reimbursed any portion of the mandated cost program. Submit a schedule detailing the reimbursement sources and amounts.
- (16) Total Claimed Amount. Subtract the sum of Offsetting Savings, line (09), and Other Reimbursements, line (10), from Total Direct and Indirect Costs, line (08). Enter the remainder on this line and carry the amount forward to form FAM-27, line (13) for the Reimbursement Claim.

<b>MANDATED COSTS COLLECTIVE BARGAINING DETERMINING WINTON ACT COSTS</b>		<b>FORM CB-1.1</b>
(01) Claimant	(02) Fiscal Year	19__/20__

NOTE: Beginning with the 1992-93 claims, a school district has the option of using Method A or Method B for this segment of the claim to determine increased costs due to the Rodda Act.

Method A: School districts have been using this method in previous fiscal years to determine increased costs. The school district reduces the current Rodda Act costs by the total 1974-75 Winton Act (base year) cost adjusted by annual changes in the implicit price deflator. Rodda Act costs in excess of the adjusted Winton Act costs are claimable. If a school district chooses to continue with this method, do not complete form CB-1.1.

Method B: This method is new. It may be advantageous for a school district to use this method if the district can provide cost documentation for each 1974-75 Winton Act cost component listed below. The Rodda Act has the three similar matching cost components. Under each matched component, report only the amount of Winton Act costs adjusted by changes in the implicit price deflator for which current Rodda Act costs exist. Examples: (1) If the Rodda Act costs exceed the adjusted Winton Act costs for the component, all Winton Act costs of the component must be reported for purposes of reducing the Rodda Act costs. (2) If the adjusted Winton Act costs exceed current Rodda Act costs for the component, residual Winton Act costs do not have to be applied against current Rodda Act costs of other components. If Method B is chosen, the claimant must complete the following:

- (01) Enter the name of the claimant.
- (02) Enter the fiscal year for which costs are being filed.
- (03) Complete the following:
  - (a) Enter in column (a) the current Rodda Act costs for each of the three cost components, if any.
  - (b) Enter in column (b) the amount of the 1974-75 Winton Act costs applicable to each of the three components. The total on line (4) column (b) should be the same as shown on form CB-1, line (5)(e).
  - (c) Enter in column (c) the product of multiplying the 1974-75 Winton Act cost component in column (b) by the implicit price deflator specified for the fiscal year of the claim.
  - (d) Enter in each row, column (d), the lesser amount of column (a) or column (c). Total column (d) and forward the amount to form CB-1, line (06).

Similar Cost Components of the Rodda Act and Winton Act	(a) Current Rodda Act Costs	(b) 1974-75 Winton Act Costs Applied	(c) 1974-75 Winton Act Costs Adjusted by IPD	(d) Winton Act Costs to be Applied
1. Determination of Bargaining and Exclusive Representation	\$	\$	\$	\$
2. Election of Unit Representation				
3. Meet and Confer (Cost of Negotiations)				
4. Totals	\$	\$	\$	\$



<b>MANDATED COSTS COLLECTIVE BARGAINING COMPONENT/ACTIVITY COST DETAIL</b>	<b>FORM CB-2</b>
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(01) Claimant	(02) Fiscal Year Costs Were Incurred
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(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

<input type="checkbox"/> Determining Bargaining Units and Exclusive Representation	<input type="checkbox"/> Collective Bargaining Agreement Disclosure
<input type="checkbox"/> Election of Unit Representation	<input type="checkbox"/> Contract Administration
<input type="checkbox"/> Cost of Negotiations	<input type="checkbox"/> Unfair Labor Practice Charges
<input type="checkbox"/> Impasse Proceedings	

(04) Description of Expenses: Complete columns (a) through (g)	<b>Object Accounts</b>
--	------------------------

(a) Employee Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel	(g) Contract Services

(05) Total <input type="checkbox"/>	Subtotal <input type="checkbox"/>	Page: ___ of ___					
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<b>COLLECTIVE BARGAINING COMPONENT/ACTIVITY COST DETAIL</b> Instructions	<b>FORM CB-2</b>
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- (01) Enter the name of the claimant.
- (02) No entry required.
- (03) Reimbursable Components. Check the box that indicates the cost component being claimed. Check only one box per form. A separate form CB-2 shall be prepared for each component that applies.
- (04) Description of Expenses. The following table identifies the type of information required to support reimbursable costs. To detail costs for the component activity box "checked" in block (03), enter the employee name(s), position title(s), a brief description of the activities performed, actual time spent by each employee, productive hourly rate(s), fringe benefit(s), materials and supplies used, travel, and contract services. **The descriptions required in column (4)(a) must be of sufficient detail to explain the cost of activities or items being claimed.** For audit purposes, all supporting documents must be retained by the claimant for a period of not less than two years after the end of the calendar year in which the reimbursement claim was filed or last amended, whichever is later. Such documents shall be made available to the State Controller's Office on request.

Object/ Sub object Accounts	Columns							Submit these supporting documents with the claim
	(a)	(b)	(c)	(d)	(e)	(f)	(g)	
<b>Salaries</b>	Employee Name	Hourly Rate	Hours Worked	Salaries = Hourly Rate x Hours Worked				
<b>Benefits</b>	Title Activities	Benefit Rate	Hours Worked	Benefits = Benefit Rate x Salaries				
<b>Materials and Supplies</b>	Description of Supplies Used	Unit Cost	Quantity Used		Cost = Unit Cost x Quantity Used			
<b>Travel</b>	Purpose of Trip Name and Title Departure and Return Date	Per Diem Rate Mileage Rate Travel Cost	Days Miles Travel Mode			Total Travel Cost = Rate x Days or Miles		
<b>Contract Services</b>	Name of Contractor Specific Tasks Performed	Hourly Rate	Hours Worked Inclusive Dates of Service				Itemized Cost of Services Performed	

- (05) Total line (04), columns (d), (e), (f), and (g) and enter the sum on this line. Check the appropriate box to indicate if the amount is a total or subtotal. If more than one form is needed to detail the component costs, number each page. Enter totals from line (05), columns (d), (e), (f), and (g) to form CB-1, block (04), columns (a), (b), (c), and (d) in the appropriate row.

Exhibit D

**SIERRA JOINT COMMUNITY  
COLLEGE DISTRICT**

Audit Report

**COLLECTIVE BARGAINING PROGRAM**

Chapter 961, Statutes of 1975,  
and Chapter 1213, Statutes of 1991

*July 1, 2002, through June 30, 2006*



**JOHN CHIANG**  
California State Controller

April 2009



**JOHN CHIANG**  
**California State Controller**

April 17, 2009

The Honorable Barbara Vineyard  
President, Board of Trustees  
Sierra Joint Community College District  
5000 Rocklin Road  
Rocklin, CA 95677

Dear Ms. Vineyard:

The State Controller's Office audited the costs claimed by the Sierra Joint Community College District for the legislatively mandated Collective Bargaining Program (Chapter 961, Statutes of 1975, and Chapter 1213, Statutes of 1991) for the period of July 1, 2002, through June 30, 2006.

The district claimed \$803,036 for the mandated program. Our audit disclosed that \$785,065 is allowable and \$17,971 is unallowable. The district claimed unsupported and ineligible costs, and understated allowable indirect costs. The unallowable costs include an adjustment for the amount of allowable costs that exceed claimed costs for fiscal years 2003-04 through 2005-06. The State paid the district \$322,166. Allowable costs claimed exceed the amount paid by \$462,899.

If you disagree with the audit findings, you may file an Incorrect Reduction Claim (IRC) with the Commission on State Mandates (CSM). The IRC must be filed within three years following the date that we notify you of a claim reduction. You may obtain IRC information at CSM's Web site link at [www.csm.ca.gov/docs/IRCForm.pdf](http://www.csm.ca.gov/docs/IRCForm.pdf).

If you have any questions, please contact Jim L. Spano, Chief, Mandated Cost Audits Bureau, at (916) 323-5849.

Sincerely,

*Original signed by*

**JEFFREY V. BROWNFIELD**  
Chief, Division of Audits

JVB/sk

The Honorable Barbara Vineyard

-2-

April 17, 2009

cc: Joyce Lopes, Director of Finance  
Sierra Joint Community College District  
Lawrence Lee  
Director of Risk, Feasibility, and Loss Control  
Sierra Joint Community College District  
Kuldeep Kaur, Specialist  
Fiscal Planning and Administration  
California Community Colleges Chancellor's Office  
Jeannie Oropeza, Program Budget Manager  
Education Systems Unit  
Department of Finance

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# Audit Report

## Summary

The State Controller's Office (SCO) audited the costs claimed by Sierra Joint Community College District for the legislatively mandated Collective Bargaining Program (Chapter 961, Statutes of 1975, and Chapter 1213, Statutes of 1991) for the period of July 1, 2002, through June 30, 2006.

The district claimed \$803,036 for the mandated program. Our audit disclosed that \$785,065 is allowable and \$17,971 is unallowable. The district claimed unsupported and ineligible costs, and understated allowable indirect costs. The unallowable costs include an adjustment for the amount of allowable costs that exceed claimed costs for fiscal years 2003-04 through 2005-06. The State paid the district \$322,166. Allowable costs claimed exceed the amount paid by \$462,899.

## Background

In 1975, the State enacted the Rodda Act (Chapter 961, Statutes of 1975), requiring the employer and employee to meet and negotiate, thereby creating a collective bargaining atmosphere for public school employers. The legislation created the Public Employment Relations Board to issue formal interpretations and rulings regarding collective bargaining under the Act. In addition, the legislation established organizational rights of employees and representational rights of employee organizations, and recognized exclusive representatives relating to collective bargaining.

On July 17, 1978, the Board of Control (now the Commission on State Mandates [CSM]) determined that the Rodda Act imposed a state mandate upon school districts reimbursable under Government Code section 17561.

Chapter 1213, Statutes of 1991, added Government Code section 3547.5, requiring school districts to publicly disclose major provisions of a collective bargaining effort before the agreement becomes binding.

On August 20, 1998, CSM determined that this legislation also imposed a state mandate upon school districts reimbursable under Government Code section 17561. Costs of publicly disclosing major provisions of collective bargaining agreements that districts incurred after July 1, 1996, are allowable.

The seven components of the Collective Bargaining Program are as follows:

- G1—Determining bargaining units and exclusive representatives
- G2—Election of unit representatives
- G3—Costs of negotiations
- G4—Impasse proceedings
- G5—Collective bargaining agreement disclosure
- G6—Contract administration
- G7—Unfair labor practice costs



The program's parameters and guidelines establish the state mandate and define reimbursement criteria. CSM adopted the parameters and guidelines on October 22, 1980, and last amended them on January 27, 2000. In compliance with Government Code section 17558, the SCO issues claiming instructions to assist local agencies and school districts in claiming mandated program reimbursable costs.

## **Objective, Scope, and Methodology**

We conducted the audit to determine whether costs claimed represent increased costs resulting from the Collective Bargaining Program for the period of July 1, 2002, through June 30, 2006.

Our audit scope included, but was not limited to, determining whether costs claimed were supported by appropriate source documents, were not funded by another source, and were not unreasonable and/or excessive.

We conducted this performance audit under the authority of Government Code sections 12410, 17558.5, and 17561. We did not audit the district's financial statements. We conducted the audit in accordance with generally accepted government auditing standards. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives.

We limited our review of the district's internal controls to gaining an understanding of the transaction flow and claim preparation process as necessary to develop appropriate auditing procedures.

We asked the district's representative to submit a written representation letter regarding the district's accounting procedures, financial records, and mandated cost claiming procedures as recommended by generally accepted government auditing standards. However, the district declined our request.

## **Conclusion**

Our audit disclosed instances of noncompliance with the requirements outlined above. These instances are described in the accompanying Summary of Program Costs (Schedule 1) and in the Findings and Recommendations section of this report.

For the audit period, the Sierra Joint Community College District claimed \$803,036 for costs of the Collective Bargaining Program. Our audit disclosed that \$785,065 is allowable and \$17,971 is unallowable.

For the fiscal year (FY) 2002-03 claim, the State paid the district \$322,166. Our audit disclosed that \$304,195 is allowable. The State will offset \$17,971 from other mandated program payments due the district. Alternatively, the district may remit this amount to the State.

For the FY 2003-04 claim, the State made no payment to the district. Our audit disclosed that \$234,496 is allowable. The State will pay allowable costs claimed that exceed the amount paid, totaling \$234,496, contingent upon available appropriations.

For the FY 2004-05 claim, the State made no payment to the district. Our audit disclosed that \$84,769 is allowable. The State will pay allowable costs claimed that exceed the amount paid, totaling \$84,769, contingent upon available appropriations.

For the FY 2005-06 claim, the State made no payment to the district. Our audit disclosed that \$161,605 is allowable. The State will pay allowable costs claimed that exceed the amount paid, totaling \$161,605, contingent upon available appropriations.

**Views of  
Responsible  
Official**

We issued a draft audit report on June 9, 2008. Joyce Lopes, Director of Finance, responded by letter dated July 3, 2008 (Attachment). The district stated that it disagrees with the unsupported costs in Finding 1 and the adjustments in Finding 3. The district also stated that it does not dispute the audit results for Findings 1 and 2. This final audit report includes the district's response.

**Restricted Use**

This report is solely for the information and use of the Sierra Joint Community College District, the California Department of Finance, and the SCO; it is not intended to be and should not be used by anyone other than these specified parties. This restriction is not intended to limit distribution of this report, which is a matter of public record.

*Original signed by*

JEFFREY V. BROWNFIELD  
Chief, Division of Audits

April 17, 2009

**Schedule 1—  
Summary of Program Costs  
July 1, 2002, through June 30, 2006**

Cost Elements	Actual Costs Claimed	Allowable per Audit	Audit Adjustment	Reference <sup>1</sup>
<u>July 1, 2002, through June 30, 2003</u>				
Direct costs:				
Components G1 through G3:				
Salaries and benefits	\$ 94,116	\$ 82,008	\$ (12,108)	Finding 1
Contracted services	118,172	118,172	—	
Subtotals	212,288	200,180	(12,108)	
Less adjusted base-year direct costs	(24,870)	(24,870)	—	
Increased direct costs, G1 through G3	187,418	175,310	(12,108)	
Components G4 through G7:				
Salaries and benefits	56,371	51,748	(4,623)	Finding 1
Contracted services	30,955	29,055	(1,900)	Finding 2
Increased direct costs, G4 through G7	87,326	80,803	(6,523)	
Total increased direct costs	274,744	256,113	(18,631)	
Indirect costs	47,422	48,082	660	Finding 3
Total program costs	<u>\$ 322,166</u>	304,195	<u>\$ (17,971)</u>	
Less amount paid by the State		(322,166)		
Allowable costs claimed in excess of (less than) amount paid		<u>\$ (17,971)</u>		
<u>July 1, 2003, through June 30, 2004</u>				
Direct costs:				
Components G1 through G3:				
Salaries and benefits	\$ 61,353	\$ 61,353	\$ —	
Contracted services	125,164	125,164	—	
Subtotals	186,517	186,517	—	
Less adjusted base-year direct costs	(25,777)	(25,777)	—	
Increased direct costs, G1 through G3	160,740	160,740	—	
Components G4 through G7:				
Salaries and benefits	19,642	19,642	—	
Contracted services	28,490	28,490	—	
Increased direct costs, G4 through G7	48,132	48,132	—	
Total increased direct costs	208,872	208,872	—	
Indirect costs	25,624	46,286	20,662	Finding 3
Subtotal	234,496	255,158	20,662	
Less allowable costs that exceed costs claimed <sup>2</sup>	—	(20,662)	(20,662)	
Total program costs	<u>\$ 234,496</u>	234,496	<u>\$ —</u>	
Less amount paid by the State		—		
Allowable costs claimed in excess of (less than) amount paid		<u>\$ 234,496</u>		

## Schedule 1 (continued)

Cost Elements	Actual Costs Claimed	Allowable per Audit	Audit Adjustment	Reference <sup>1</sup>
<u>July 1, 2004, through June 30, 2005</u>				
Direct costs:				
Components G1 through G3:				
Salaries and benefits	\$ 24,892	\$ 26,920	\$ 2,028	Finding 1
Contracted services	42,214	42,214	—	
Subtotals	67,106	69,134	2,028	
Less adjusted base-year direct costs	(26,933)	(26,933)	—	
Increased direct costs, G1 through G3	40,173	42,201	2,028	
Components G4 through G7:				
Salaries and benefits	7,742	7,956	214	Finding 1
Contracted services	30,149	30,149	—	
Increased direct costs, G4 through G7	37,891	38,105	214	
Total increased direct costs	78,064	80,306	2,242	
Indirect costs	6,705	25,838	19,133	Finding 3
Subtotal	84,769	106,144	21,375	
Less allowable costs that exceed costs claimed <sup>2</sup>	—	(21,375)	(21,375)	
Total program costs	<u>\$ 84,769</u>	84,769	<u>\$ —</u>	
Less amount paid by the State		—		
Allowable costs claimed in excess of (less than) amount paid		<u>\$ 84,769</u>		
<u>July 1, 2005, through June 30, 2006</u>				
Direct costs:				
Components G1 through G3:				
Salaries and benefits	\$ 31,294	\$ 31,294	\$ —	
Contracted services	118,720	118,720	—	
Subtotals	150,014	150,014	—	
Less adjusted base-year direct costs	(29,314)	(29,314)	—	
Increased direct costs, G1 through G3	120,700	120,700	—	
Components G4 through G7:				
Salaries and benefits	3,892	3,892	—	
Contracted services	30,762	30,762	—	
Increased direct costs, G4 through G7	34,654	34,654	—	
Total increased direct costs	155,354	155,354	—	
Indirect costs	6,251	55,461	49,210	Finding 3
Subtotal	161,605	210,815	49,210	
Less allowable costs that exceed costs claimed <sup>2</sup>	—	(49,210)	(49,210)	
Total program costs	<u>\$ 161,605</u>	161,605	<u>\$ —</u>	
Less amount paid by the State		—		
Allowable costs claimed in excess of (less than) amount paid		<u>\$ 161,605</u>		

## Schedule 1 (continued)

Cost Elements	Actual Costs Claimed	Allowable per Audit	Audit Adjustment	Reference <sup>1</sup>
<u>Summary: July 1, 2002, through June 30, 2006</u>				
Total increased direct costs	\$ 717,034	\$ 700,645	\$ (16,389)	
Indirect costs	<u>86,002</u>	<u>175,667</u>	<u>89,665</u>	
Subtotal	803,036	876,312	73,276	
Less allowable costs that exceed costs claimed <sup>2</sup>	<u>—</u>	<u>(91,247)</u>	<u>(91,247)</u>	
Total program costs	<u>\$ 803,036</u>	785,065	<u>\$ (17,971)</u>	
Less amount paid by the State		<u>(322,166)</u>		
Allowable costs claimed in excess of (less than) amount paid		<u>\$ 462,899</u>		

<sup>1</sup> See the Findings and Recommendations section.

<sup>2</sup> Government Code section 17561 stipulates that the State will not reimburse any claim more than one year after the filing deadline specified in the SCO's claiming instructions. That deadline has expired for FY 2003-04, FY 2004-05, and FY 2005-06.

## Findings and Recommendations

### FINDING 1— Unallowable salaries and benefits

The district claimed unallowable salaries and benefits totaling \$14,489 for the audit period. The related indirect costs total \$4,938.

We made the audit adjustment based on the following issues:

- The district reported inaccurate productive hourly rates totaling \$6,944 for fiscal year (FY) 2002-03 and FY 2004-05.
- The district claimed mandate-related hours totaling \$4,468 for FY 2002-03 that did not agree with hours it documented by time records.
- The district claimed ineligible contract administration costs related to attendance at a conference totaling \$3,077 for FY 2002-03.

The following table summarizes the unallowable salaries and benefits, and related indirect costs:

	Fiscal Year		Total
	2002-03	2004-05	
Components G1-G3:			
Incorrect productive hourly rate	\$ (7,865)	\$ 2,028	\$ (5,837)
Unsupported hours	(4,243)	—	(4,243)
Total, components G1-G3	<u>(12,108)</u>	<u>2,028</u>	<u>(10,080)</u>
Components G4-G7:			
Incorrect productive hourly rates	(1,321)	214	(1,107)
Unsupported hours	(225)	—	(225)
Ineligible hours	(3,077)	—	(3,077)
Total, components G4-G7	<u>(4,623)</u>	<u>214</u>	<u>(4,409)</u>
Total direct costs	(16,731)	2,242	(14,489)
Indirect costs	<u>(5,855)</u>	<u>917</u>	<u>(4,938)</u>
Audit adjustment	<u>\$ (22,586)</u>	<u>\$ 3,159</u>	<u>\$ (19,427)</u>

The program's parameters and guidelines state that the district will be reimbursed for the "increased costs" incurred as a result of compliance with the mandate. Government Code section 17514 states that "costs mandated by the State" means any increased costs that a school district is required to incur.

The parameters and guidelines state that reimbursable contract administration includes adjudication of contract disputes, enforcement of the contract, and training on the negotiated contract. Time spent by employees attending personal development programs, conferences, and workshops is not reimbursable.

### Recommendation

We recommend that the district ensure that all costs claimed are allowable and properly supported.

### District's Response

#### Audit report format errors

The district response identified audit report format errors in which the narrative amounts presented in the finding do not reconcile to the individual amounts presented in the findings' table. In addition, the district offered the following specific comments on the finding:

The District does not dispute this finding at this time.

Finding 1 eliminates \$14,489 as unallowable salary and benefits costs with \$4,938 in related indirect costs, for a total adjustment of \$19,427. The direct cost disallowed of \$14,489 consists of three amounts:

- \$6,944 disallowed due to "inaccurate productive hourly rates";
- \$4,468 disallowed due to hours claimed "that did not agree with hours documented"; and,
- \$3,077 as unallowable costs claimed.

Note that none of the adjustments were made because the costs claimed were excessive or unreasonable.

#### Productive Hourly Rates

The draft audit report asserts that inaccurate productive hourly rates were reported, resulting in costs that were overstated by \$9,186 for FY 2002-03 and understated by \$2,242 for FY 2004-05, leaving a net audit adjustment of \$6,944. The claims submitted by the district include a list of productive hourly rates for each employee by mandate component. The Controller's productive hourly rate calculation for several employees used different productive hours and benefit rates. The calculations will be reviewed and any continuing dispute will be the subject of the District's incorrect reduction claim.

#### "Unsupported Hours" Claimed

The draft audit report asserts \$4,468 for "undocumented" salaries and benefits. The documentation deficiencies are characterized in the auditor's detailed workpapers as: "undocumented"; "couldn't find"; "duplicate hours"; "contract interpretation"; "could not locate"; "per [employee's] log"; "addition error?"; and, "didn't sign."

The District concurs that claimed staff time must be documented, but does not concur with the adjustments because the audit report does not provide evidence in support of the qualitative decision the auditor made to disallow specific staff time. In other words, there is no evidence of why the auditor concluded that the costs were insufficiently supported.

The parameters and guidelines essentially require claimants to “show” or “indicate” the costs claimed. While everyone involved in the mandate reimbursement process can regret the imprecision of these instructions, these instructions do not require as a specific condition of reimbursement that claimants provide the individual activity log sheets or time records the Controller has established after the fact as an audit requirement. Instead, the parameters and guidelines specify a “worksheet” supporting the calculation of hourly rates and benefits. The District has complied with the parameters and guidelines by supplying the Controller with worksheets supporting the costs claimed.

Unallowable Activities Claimed

The audit disallows \$3,077 claimed for two District administrators to attend a personnel manager’s conference (ACHRO). The District does not dispute this finding at this time.

SCO’s Comments

The fiscal effect of the finding and recommendation are unchanged.

**Audit Report Format Errors**

The total adjustment identified in the table agrees with the total adjustment identified in the narrative. However, as pointed out in the district’s response to the draft report, the description of the first two lines under Components G1-G3, “Unsupported hours” and “Incorrect productive hourly rates” were switched in error and \$33 adjustment for unsupported hours under Components G4-G7 was identified in error in the table as ineligible hours. The final report has been updated to eliminate these errors.

**Productive Hourly Rates**

The district’s response did not provide any specific objection to this issue.

**Unsupported Hours Claimed**

The district believes that worksheets provided with the mandated claims are adequate documentation in support of claimed costs in accordance with the parameters and guidelines. However, Government Code section 17561, subdivision (d)(2), states that the Controller may audit the records of any local agency or school district to verify the actual amount of the mandated costs and may reduce any claim that the Controller determines is excessive and/or unreasonable. The worksheets provided by the district did not support actual costs incurred.



In submitting its FY 2002-03 mandate claim, the district completed Form CB-2, which identified annual hours individual employees spent on reimbursable mandated activities. The district also provided documentation used to report the hours. The submitted documentation did not support 55.4 hours claimed. The unsupported hours were due to the following:

<u>Reason for Unsupported Hours</u>	<u>Hours</u>
Mathematical errors	24.2
Hours not traced to Individual Activity Time Log used to support reported hours	19.3
Meeting minutes showed employee was absent	5.5
Duplicated hours claimed	3.0
Employees name was not on meeting sign-in sheet	1.6
Agenda did not support hours reported	1.0
No documentation submitted	<u>0.8</u>
Total unsupported hours	<u>55.4</u>

**Unallowable Activities Claimed**

As noted in the district’s response, it did not dispute this adjustment.

**FINDING 2—  
Unallowable contracted  
services costs**

The district claimed unallowable mediator costs totaling \$1,900 for FY 2002-03.

The following table summarizes the contract services audit adjustment:

<u>Contract Services</u>	<u>Fiscal Year 2002-03</u>
Component G6: Mediator costs	<u>\$ (1,900)</u>
Total, component activity G6	<u>\$ (1,900)</u>

The program’s parameters and guidelines state that costs of the mediator related to impasse proceedings is not reimbursed.

Recommendation

We recommend that the district ensure that only eligible claim components are reported for reimbursement.

District’s Response

The district does not dispute this finding at this time.

SCO’s Comment

The finding and recommendation are unchanged.

**FINDING 3—  
Understated indirect  
costs**

The district underclaimed allowable indirect costs totaling \$94,818 for the audit period. Of that amount, \$4,938 resulted from unallowable salaries and benefits identified in Finding 1. The remaining balance identified in this finding totals \$89,880.

The district developed indirect cost rate proposals (ICRPs) in accordance with Office of Management and Budget (OMB) Circular A-21, (Title 2, Code of Federal Regulations, Part 220). For FY 2004-05 and FY 2005-06, the parameters and guidelines and the SCO's claiming instructions do not provide districts the option of using a federally-approved rate. For FY 2002-03 and FY 2003-04, the SCO's claiming instructions allow the district to use federally-approved rate prepared in accordance with OMB Circular A-21. However, the district did not obtain federal approval for the applicable two fiscal years.

We, therefore, calculated allowable indirect costs based on the SCO's Form FAM-29C methodology allowed by the parameters and guidelines and the SCO's claiming instructions. We applied the allowable indirect cost rates to allowable direct costs according to the SCO's claiming instructions. The calculated FAM-29C indirect cost rates did not support the rates claimed.

The district applied its indirect cost rates to salaries and benefits. However, the FAM-29C methodology includes contract services in the base. Therefore, we applied the FAM-29C indirect cost rates to salaries and benefits, and contract services.

The following table summarizes the claimed and allowable indirect costs rates:

	Fiscal Year			
	2002-03	2003-04	2004-05	2005-06
Indirect cost rates:				
Allowable indirect rates	21.06%	22.16%	31.30	34.97%
Less claimed indirect cost rate	(35.00)%	(39.15)%	(40.90)%	(35.70)%
Unsupported indirect cost rate <sup>1</sup>	(13.94)%	(16.99)%	(9.60)%	(0.73)%

<sup>1</sup> Difference for FY 2005-06 is immaterial

The following table summaries the understated indirect costs:

	Fiscal Year				Total
	2002-03	2003-04	2004-05	2005-06	
Total allowable increased direct costs	\$256,113	\$208,872	\$ 80,306	\$155,354	
Allowable indirect cost rate	× 21.06%	× 22.16%	× 31.30%	× 35.70%	
Allowable indirect costs	53,937	46,286	25,136	55,461	\$ 180,820
Less claimed indirect costs	(47,422)	(25,624)	(6,705)	(6,251)	(86,002)
Understated indirect costs	6,515	20,662	18,431	49,210	94,818
Finding 1 adjusted indirect costs	(5,855)	—	917	—	(4,938)
Audit adjustment	\$ 660	\$ 20,662	\$ 19,348	\$ 49,210	\$ 89,880

The parameters and guidelines state, "Indirect costs may be claimed in the manner described by the State Controller in his claiming instructions."

For FY 2002-03 and FY 2003-04, the SCO's claiming instructions state:

A college has the option of using a federally approved rate, utilizing the cost accounting principles from Office of Management and Budget Circular A-21 "Cost Principles for Educational Institutions," or the Controller's [FAM-29C] methodology. . . .

For FY 2004-05 forward, the SCO's claiming instructions state:

A CCD [community college district] may claim indirect costs using the Controller's methodology (FAM-29C). . . If specifically allowed by a mandated program's [parameters and guidelines], a district may alternately choose to claim indirect costs using either (1) a federally approved rate prepared in accordance with Office of Management and Budget (OMB) Circular A-21, *Cost Principles for Educational Institutions*; or (2) a flat 7% rate.

#### Recommendation

We recommend that the district claim indirect costs based on indirect cost rates computed in accordance with the SCO's claiming instructions. The district must obtain federal approval when it prepares ICRPs in accordance with OMB Circular A-21 for FY 2003-04 and prior years. Alternatively, the district should prepare its ICRPs using the SCO's Form FAM-29C methodology.

#### District's Response

The Controller asserts that the District understated its indirect cost rates in the amount of \$6,515 for FY 2002-03, \$20,662 for FY 2003-04, \$18,431 for FY 2004-05, and \$49,210 for FY 2005-06. The understatement results from two sources other than the \$4,938 in allowable salaries and benefits from Finding 1.

#### Depreciation and Capital Costs

The first difference in methods is depreciation expense. The District included the CCSF-11 capital costs in the allocation of overhead costs for all four fiscal years. The Controller did not, but beginning FY 2004-05, the Controller's calculation includes depreciation expense (which are amortized capital costs) and the variance in claimed and audited rate declines.

The draft audit report states:

The district developed indirect cost rate proposals (ICRPs) based on Office of Management and Budget (OMB) Circular A-21 methodology. However, the district did not obtain federal approval for its ICRPs. Therefore, we calculated indirect cost rates using the alternative methodology (FAM-29C) allowed by the SCO's claiming instructions. The calculated FAM-29C indirect cost rates did not support the rates claimed.

The audit report asserts that the District must obtain federal approval when it prepares ICRPs in accordance with OMB Circular A-21. Neither the Commission nor the Controller has ever specified the federal agencies which have the authority to "approve" indirect cost rates. The parameters and guidelines also allow for calculation of the indirect cost rates using the Controller's FAM-29C. The correct forms were used and the claimed amounts were entered at the correct locations.

Both the District's method and the Controller's FAM-29C method utilize the same source document, the CCFS-311 annual financial and budget report required by the State. The difference in the claimed and audited methods is the determination of which of those cost elements are direct costs and which are indirect costs. Indeed, federally "approved" rates that the Controller will accept without further action are "negotiated" rates calculated by the District and submitted for approval, indicating that the process is not an exact science, but rather a determination of the relevance and reasonableness of the costs allocation assumptions made for the method used.

Government Code Section 17561(d)(2) requires the Controller to pay claims, provided that the Controller may audit the records of any school district to verify the actual amount of the mandated costs, and may reduce any claim that the Controller determines is excessive or unreasonable. The Controller is not authorized to simply recalculate the indirect cost rate using its own preferred method, without making the determination that the claimed rate is excessive or unreasonable. In this case, the only determination the Controller made was that the District's rate wasn't federally approved. The District has computed its indirect cost rate utilizing cost accounting principles from the Office of Management and Budget Circular A-21, and the draft audit report has disallowed it without a determination of whether the product of the District's calculation would, or would not, be excessive, unreasonable, or inconsistent with cost accounting principles.

#### Contract Services

The second difference in method is the treatment of contract services costs. The District applied the indirect cost rate to salaries and benefits. The draft audit report indicates that the Controller's calculation includes contract services. This is the primary source of the unclaimed allowable costs of \$91,247 (FY 2003-04 \$20,662; FY 2004-05 \$21,375; and FY 2005-06 \$49,210). The audit identified these allowable costs but does not include them in the amount to be reimbursed.

The Controller dismisses these unclaimed costs in footnote (2) on page 6 of the draft audit report:

Government Code 17561 stipulates that the State will not reimburse any claim more than one year after the filing deadline specified in the SCO's claiming instructions. That deadline has expired for FY 2003-04, FY 2004-05, and FY 2005-06.

This statement is both inaccurate and irrelevant to the issue. The correct citation to Government Code Section 17561(d)(3) is:

In no case may a reimbursement claim be paid if *submitted* more than one year after the filing deadline specified in the Controller's claiming instructions on funded mandates (Emphasis added)

The District is not submitting a new claim for these costs. The findings are the result of the Controller's audit. Further, Government Code Section 17561(d)(2) states:

... the Controller (A) may audit (i) the records of any local agency or school district to verify the actual amount of the mandated costs, . . . and (C) shall adjust the payment to correct for any underpayments or overpayments that occurred in previous fiscal years.

The use of the word "shall" makes the adjustment of *both* underpayments and overpayments mandatory. Thus, the Controller does not have the discretion to unilaterally determine that it will require reimbursement for audit adjustments in favor of the State and simply ignore audit adjustments in favor of the claimants. The Controller, therefore, has the obligation to pay claimants any unclaimed allowable mandate costs it discovers as a result of an audit.

#### SCO's Comments

The factual accuracy of our finding and recommendation are unchanged. However, the SCO has revised the wording of the original finding with additional parameters and guidelines and SCO claiming-instruction statements to clarify the finding.

The CSM and Controller are not responsible for identifying the district's responsible federal agency. OMB Circular A-21 states:

[Cognizant agency responsibility] is assigned to the Department of Health and Human Services (HHS) or the Department of Defense's Office of Naval Research (DOD), normally depending on which of the two agencies (HHS or DOD) provides the more funds to the educational institution for the most recent three years. . . . In cases where neither HHS nor DOD provides Federal funding to an educational institution, the cognizant agency assignment shall default to HHS.

Government Code section 17558.5 requires the district to file a reimbursement claim for actual mandate-related costs. Government Code section 17561, subdivision (d)(2) allows the SCO to audit the district's records to verify actual mandate-related costs and reduce any claim that the SCO determines is excessive or unreasonable. In addition, Government Code section 12410 states, "The Controller shall audit all claims against the state, and may audit the disbursement of any state money, for correctness, legality, and for sufficient provisions of law for payment." Therefore, the district's contention that the SCO is authorized to reduce a claim only if it determines the claim to be excessive or unreasonable is without merit.

However, the SCO did, in fact, conclude that the district's indirect cost rates were excessive. "Excessive" is defined as "exceeding what is usual, proper, necessary, or normal. . . . Excessive implies an amount or degree too great to be reasonable or acceptable. . . ." <sup>1</sup> The district did not obtain federal approval of its ICRPs for the applicable fiscal years. We calculated indirect cost rates using the alternate methodology identified in SCO claiming instructions. This alternate method did not support the rates that the district claimed; thus, the rates claimed were excessive.

Government Code section 17561, subdivision (d)(3), does allow reimbursement claims to be reimbursed if submitted more than one year after the filing deadline. However, only the total costs included in the initial or amended claim may be reimbursed within one year of the filing deadline. Section 17561, subdivision (d)(2), allows the SCO to adjust the payment to correct for any underpayments or overpayments based on allowable costs claimed.

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<sup>1</sup> Merriam-Webster's Collegiate Dictionary, Tenth Edition, © 2001.

#### **OTHER ISSUE— Statutes of limitations**

In its response to the draft audit report, the district addressed an issue related to SCO's authority to audit FY 2002-03 claims within the statute of limitations.

##### District's Issue

This was not an audit finding. The District's FY 2002-03 claim was submitted to the Controller's Office on January 15, 2004. Pursuant to Government Code Section 17558.5, this claim is subject to the initiation of an audit only until January 15, 2007. The Controller's audit was not initiated until April 2007. Therefore, audit or adjustment of the claim for FY 2002-03 is barred by the statute of limitations.

##### SCO's Comments

Government Code section 17558.5, subdivision (a), in effect for the audit period states that a reimbursement claim for actual costs filed by a community college district for this mandate is subject to the initiation of an audit by the SCO no later than three years after the date that the actual reimbursement claim is filed or last amended, whichever is later. However, if no funds are appropriated or no payment is made to a claimant for the program for the fiscal year for which the claim is filed, the time for the SCO to initiate an audit shall commence to run from the date of initial payment of the claim.

The district filed its initial FY 2002-03 claims on January 15, 2004, and received the initial claim payment on October 30, 2006. Therefore, this claim was subject to the initiation of an SCO audit until October 30, 2009. The SCO conducted an audit entrance conference on April 17, 2007. Therefore, the SCO initiated an audit within the period that the claim was subject to audit.

**Attachment—  
District's Response to  
Draft Audit Report**

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# SIERRA COLLEGE

*At Sierra College We Pave the Way for Learning, Inspire Change and Build Community*

CERTIFIED MAIL - RETURN RECEIPT REQUESTED

July 3, 2008

Mr. Jim L. Spano, Chief  
Mandated Costs Audits Bureau  
California State Controller  
Division of Audits  
P.O. Box 942850  
Sacramento, CA 94250-5874

Re: Sierra Joint Community College District  
Chapter 961, Statutes of 1975  
Collective Bargaining  
Fiscal Years 2002-03, 2003-04, 2004-05, and 2005-06

Dear Mr. Spano:

This letter is the response of Sierra Joint Community College District to the letter of Jeffrey V. Brownfield, dated June 9, 2008, and received by the District on June 20, 2008, which transmits a draft copy of your audit report of the District's Collective Bargaining annual reimbursement claims, for the period of July 1, 2002 through June 30, 2006.

### **Audit Report Format Errors**

The draft audit report fails to adequately disclose the amounts adjusted by reason or fiscal year. This information had to be reconciled to detail information provided at the exit conference. The amounts summarized by reason in Finding 1 of the draft audit report narrative cannot be reconciled with the detail schedule directly below. First, it appears that the line items under Components G1-G3 are incorrectly labeled. The amounts listed as "unsupported hours" (<\$7,865> for FY 2002-03 and \$2,028 for FY 2004-05) can be traced to adjustments attributed to "incorrect productive hourly rates" in schedules provided at the exit conference. Second, the amounts listed for both "unsupported hours" (once the line item labels are corrected) and "ineligible hours" on

• 5000 Rocklin Road • Rocklin, CA 95677 • TEL 916-624-3333 •



the detail schedule do not correspond to the amounts listed for these items in the preceding paragraph.

#### **Finding 1 Unallowable salary and benefit costs**

The District does not dispute this finding at this time.

Finding 1 eliminates \$14,489 as unallowable salary and benefits costs with \$4,938 in related indirect costs, for a total adjustment of \$19,427. The direct cost disallowed of \$14,489 consists of three amounts:

- \$6,944 disallowed due to "inaccurate productive hourly rates";
- \$4,468 disallowed due to hours claimed "that did not agree with hours documented"; and,
- \$3,077 as unallowable costs claimed.

Note that none of the adjustments were made because the costs claimed were excessive or unreasonable.

#### Productive Hourly Rates

The draft audit report asserts that inaccurate productive hourly rates were reported, resulting in costs that were overstated by \$9,186 for FY 2002-03 and understated by \$2,242 for FY 2004-05, leaving a net audit adjustment of \$6,944. The claims submitted by the district include a list of productive hourly rates for each employee by mandate component. The Controller's productive hourly rate calculation for several employees used different productive hours and benefit rates. The calculations will be reviewed and any continuing dispute will be the subject of the District's incorrect reduction claim.

#### "Unsupported Hours" Claimed

The draft audit report asserts \$4,468 for "undocumented" salaries and benefits. The documentation deficiencies are characterized in the auditor's detailed workpapers as: "undocumented"; "couldn't find"; "duplicate hours"; "contract interpretation"; "could not locate"; "per [employee's] log"; "addition error?"; and, "didn't sign."

The District concurs that claimed staff time must be documented, but does not concur with the adjustments because the audit report does not provide evidence in support of the qualitative decision the auditor made to disallow specific staff time. In other words, there is no evidence of why the auditor concluded that the costs were insufficiently supported.

The parameters and guidelines essentially require claimants to "show" or "indicate" the costs claimed. While everyone involved in the mandate reimbursement process can regret the imprecision of these instructions, these instructions do not require as a specific condition of reimbursement that claimants provide the individual activity log

sheets or time records the Controller has established after the fact as an audit requirement. Instead, the parameters and guidelines specify a "worksheet" supporting the calculation of hourly rates and benefits. The District has complied with the parameters and guidelines by supplying the Controller with worksheets supporting the costs claimed.

#### Unallowable Activities Claimed

The audit disallows \$3,077 claimed for two District administrators to attend a personnel manager's conference (ACHRO). The District does not dispute this finding at this time.

#### **Finding 2 Unallowable contracted services costs**

Finding 2 disallows \$1,900 in contract services for mediator services. The District does not dispute this finding at this time.

#### **Finding 3 Understated indirect cost rates claimed**

The Controller asserts that the District understated its indirect cost rates in the amount of \$6,515 for FY 2002-03, \$20,662 for FY 2003-04, \$18,431 for FY 2004-05, and \$49,210 for FY 2005-06. The understatement results from two sources other than the \$4,938 in allowable salaries and benefits from Finding 1.

#### Depreciation and Capital Costs

The first difference in methods is depreciation expense. The District included the CCSF-11 capital costs in the allocation of overhead costs for all four fiscal years. The Controller did not, but beginning FY 2004-05, the Controller's calculation includes depreciation expense (which are amortized capital costs) and the variance in claimed and audited rate declines.

The draft audit report states:

The district developed indirect cost rate proposals (IRCPs) based on Office of Management and Budget (OMB) Circular A-21 methodology. However, the district did not obtain federal approval for its IRCPs. Therefore, we calculated indirect cost rates using the alternative methodology (FAM-29C) allowed by the SCO's claiming instructions. The calculated FAM-29C indirect cost rates did not support the rated claimed.

The audit report asserts that the District must obtain federal approval when it prepares ICRPs in accordance with OMB Circular A-21. Neither the Commission nor the Controller has ever specified the federal agencies which have the authority to "approve" indirect cost rates. The parameters and guidelines also allow for calculation of the

indirect cost rate using the Controller's FAM -29C. The correct forms were used and the claimed amounts were entered at the correct locations.

Both the District's method and the Controller's FAM-29C method utilize the same source document, the CCFS-311 annual financial and budget report required by the State. The difference in the claimed and audited methods is the determination of which of those cost elements are direct costs and which are indirect costs. Indeed, federally "approved" rates that the Controller will accept without further action are "negotiated" rates calculated by the District and submitted for approval, indicating that the process is not an exact science, but rather a determination of the relevance and reasonableness of the costs allocation assumptions made for the method used.

Government Code Section 17561(d)(2) requires the Controller to pay claims, provided that the Controller may audit the records of any school district to verify the actual amount of the mandated costs, and may reduce any claim that the Controller determines is excessive or unreasonable. The Controller is not authorized to simply recalculate the indirect cost rate using its own preferred method, without making the determination that the claimed rate is excessive or unreasonable. In this case, the only determination the Controller made was that the District's rate wasn't federally approved. The District has computed its indirect cost rate utilizing cost accounting principles from the Office of Management and Budget Circular A-21, and the draft audit report has disallowed it without a determination of whether the product of the District's calculation would, or would not, be excessive, unreasonable, or inconsistent with cost accounting principles.

#### Contract Services

The second difference in method is the treatment of contract services costs. The District applied the indirect cost rate to salaries and benefits. The draft audit report indicates that the Controller's calculation includes contract services. This is the primary source of the unclaimed allowable costs of \$91,247 (FY 2003-04 \$20,662; FY 2004-05 \$21,375; and FY 2005-06 \$49,210). The audit identified these allowable costs but does not include them in the amount to be reimbursed.

The Controller dismisses these unclaimed costs in footnote (2) on page 6 of the draft audit report:

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This statement is both inaccurate and irrelevant to the issue. The correct citation to Government Code Section 17561(d)(3) is:

In no case may a reimbursement claim be paid if *submitted* more than one year after the filing deadline specified in the Controller's claiming instructions on funded mandates. (Emphasis added)

The District is not submitting a new claim for these costs. The findings are the result of the Controller's audit. Further, Government Code Section 17561(d)(2) states:

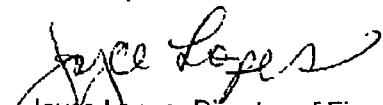
... the Controller (A) may audit (i) the records of any local agency or school district to verify the actual amount of the mandated costs, ... and (C) shall adjust the payment to correct for any underpayments or overpayments that occurred in previous fiscal years.

The use of the word "shall" makes the adjustment of *both* underpayments and overpayments mandatory. Thus, the Controller does not have the discretion to unilaterally determine that it will require reimbursement for audit adjustments in favor of the State and simply ignore audit adjustments in favor of the claimants. The Controller, therefore, has the obligation to pay claimants any unclaimed allowable mandate costs it discovers as the result of an audit.

**Statute of Limitations**

This was not an audit finding. The District's FY 2002-03 claim was submitted to the Controller's Office on January 15, 2004. Pursuant to Government Code Section 17558.5, this claim is subject to the initiation of an audit only until January 15, 2007. The Controller's audit was not initiated until April 2007. Therefore, audit or adjustment of the claim for FY 2002-03 is barred by the statute of limitations.

Sincerely,



Joyce Lopes, Director of Finance  
Sierra Joint Community College District

**State Controller's Office  
Division of Audits  
Post Office Box 942850  
Sacramento, CA 94250-5874**

**<http://www.sco.ca.gov>**

Exhibit E

Exhibit E





**CLAIM FOR REIMBURSEMENT**  
 Pursuant to Government Code Section 17561  
 Collective Bargaining

(19) Program Number 00011	Program <b>011</b>
(20) Date Filed <u>    </u> / <u>    </u> / <u>    </u>	
(21) LRS Input <u>    </u> / <u>    </u> / <u>    </u>	

(01) Claimant Identification Number S31090		
Mailing Address		
Claimant Name Sierra Joint Community College District		
County of Location Placer		
Street Address or PO Box 5000 Rocklin Road		
City Rocklin	State CA	Zip Code 95677

Reimbursement Claim Data	
(22) CB-1, (03)(1)(e)	\$0.00
(23) CB-1, (03)(2)(e)	\$0.00
(24) CB-1, (03)(3)(e)	\$212,288.22
(25) CB-1, (03)(4)(e)	\$2,381.73
(26) CB-1, (03)(5)(e)	\$0.00
(27) CB-1, (03)(6)(e)	\$64,890.03
(28) CB-1, (03)(7)(e)	\$20,054.19
(29) CB-1, (04)(d)	\$149,126.60
(30) CB-1, (04)(e)	\$299,614.20
(31) CB-1, (05)(e)	\$7,557.00
(32)	
(33)	
(34)	
(35)	
(36)	
(37)	

Type of Claim	Estimated Claim (03) Estimated	Reimbursement Claim (09) Reimbursement
Fiscal Year of Cost	(06) 2003-2004	(12) 2002-2003
Total Claim Amount	(07) \$354,300	(13) \$322,166
Less: 10% Late Penalty, not to exceed \$1,000		(14) \$0
Less: Estimated Claim Payment Received		(15) \$0
Net Claim Amount		(16) \$322,166
Due from State	(08) \$354,300	(17) \$322,166
Due to State		(18) \$0

**(38) CERTIFICATION OF CLAIM**

In accordance with the provisions of Government Code § 17561, I certify that I am the officer authorized by the local agency to file claims with the State of California for costs mandated by Chapter 961, Statutes of 1975, and certify under penalty of perjury that I have not violated any of the provisions of Government Code § 1090 to 1096, inclusive.

I further certify that there was no application other than from the claimant, nor any grant or payment received, for reimbursement of costs claimed herein; and such costs are for a new program or increased level of services of an existing program mandated by Chapter 961, Statutes of 1975.

The amounts for Estimated Claim and/or Reimbursement Claim are hereby claimed from the State for payment of estimated and/or actual Costs for the mandated program of Chapter 961, Statutes of 1975, set forth on the attached statements.

Signature of Authorized Officer

Joyce Lopes  
 Joyce Lopes  
 Print Name

Date

1/13/4  
 Director of Finance  
 Title

(39) Name of Contact Person for Claim  
 Six Ten and Associates

Telephone Number (858) 514-8605  
 E-Mail Address kbpsixten@aol.com

Program <b>011</b>		Mandated Costs Collective Bargaining Claim Summary				Form <b>CB-1</b>
Claimant Sierra Joint Community College District		(02) Type of Claim Reimbursement		Fiscal Year 2002-2003		
Rodda Act Direct Costs		Cost Elements				
(03) Reimbursable Components:	(a) Salaries & Benefits	(b) Materials & Supplies	(c) Travel & Training	(d) Contracted Services	(e) Total	
1. Determination of Bargaining Units and Exclusive Representation	\$0.00	\$0.00	0.00	\$0.00	\$0.00	
2. Election of Unit Representation	\$0.00	\$0.00	0.00	\$0.00	\$0.00	
3. Cost of Negotiations	\$94,116.12	\$0.00	0.00	\$118,172.10	\$212,288.22	
4. Impasse Proceedings	\$481.73	\$0.00	0.00	\$1,900.00	\$2,381.73	
5. Collective Bargaining Agreement Disclosure	\$0.00	\$0.00	0.00	\$0.00	\$0.00	
6. Contract Administration	\$54,681.53	\$0.00	0.00	\$10,208.50	\$64,890.03	
7. Unfair Labor Practice Charges	\$1,208.19	\$0.00	0.00	\$18,846.00	\$20,054.19	
(04) Total Rodda Act Direct Costs	\$150,487.57	\$0.00	\$0.00	\$149,126.60	\$299,614.17	
Winton Act Direct Costs						
(05) Base Year, 1974/75 Direct Costs	4,453.00	0.00	104.00	3,000.00	7,557.00	
(6) Base Year Direct Costs Adjusted by IPD	[Line (05)(e) x 3.291] for 2002-2003 f.y.]				24,870.09	
(07) Increased Direct Costs	[Line (04)(e) - line (06)]				274,744.09	
Indirect Costs						
(08) Total Rodda Act Direct Costs less Contracted Services	[Line (04)(e) - line (04)(d)]				150,487.57	
(09) Base Year Costs Less Contracted Services adjusted by IPD	[Line (05)(e) - line (05)(d)] x 3.291]				14,997.09	
(10) Increased Direct Costs less Contracted Services	[Line (08) - line (09)]				135,490.49	
(11) Indirect Cost Rate	From J-380, J-580 or FAM-27C				35.00%	
(12) Increased Indirect Costs	[Line (10) x line (11)]				47,421.67	
(13) Total Direct and Indirect Costs	[Line (07) + line (12)]				322,165.76	
Cost Reduction						
(14) Less: Offsetting Savings, if applicable					\$0.00	
(15) Less: Other Reimbursements, if applicable					\$0.00	
(16) Total Claimed Amount:	[Line (13) - {Line (14) + Line (15)}]				322,165.76	

**SIERRA JOINT COMMUNITY COLLEGE DISTRICT  
CALCULATION OF INDIRECT COST RATE,  
FISCAL YEAR  
2001-2002**

*For 02-09 claims*

REFERENCE (CCFS 311)	DESCRIPTION	2001-2002
<b>INSTRUCTIONAL ACTIVITY</b>		
	<b>Instructional Costs</b>	
	Instructional Salaries and Benefits	25,326,971
	Instructional Operating Expenses	1,314,647
	Instructional Support Instructional Salaries and Benefits	0
	Auxiliary Operations Instructional Salaries and Benefits	0
	<b>TOTAL INSTRUCTIONAL COSTS 1</b>	<b>26,641,618</b>
	<b>Non-Instructional Costs</b>	
	Non-Instructional Salaries and Benefits	0
	Instructional Admin. Salaries and Benefits	2,723,525
	Instructional Admin. Operating Expenses	513,444
	Auxiliary Classes Non-Inst. Salaries and Benefits	414,041
	Auxiliary Classes Operating Expenses	228,243
	<b>TOTAL NON-INSTRUCTIONAL COSTS 2</b>	<b>3,879,253</b>
	<b>TOTAL INSTRUCTIONAL ACTIVITY COSTS 3 (1 + 2)</b>	<b>30,520,871</b>
<b>DIRECT SUPPORT ACTIVITY</b>		
	<b>Direct Support Costs</b>	
	Instructional Support Services Non Inst. Salaries and Benefits	1,582,740
	Instructional Support Services Operating Expenses	338,502
	Admissions and Records	1,382,746
	Counseling and Guidance	2,565,093
	Other Student Services	3,503,777
	<b>TOTAL DIRECT SUPPORT COSTS 4</b>	<b>9,372,858</b>
	<b>TOTAL INSTRUCTIONAL ACTIVITY COSTS AND DIRECT SUPPORT COSTS 5 (3 + 4)</b>	<b>39,893,729</b>
	<b>Indirect Support Costs</b>	
	Operation and Maintenance of Plant	4,024,342
	Planning and Policy Making	1,489,655
	General Instructional Support Services	8,450,636
	<b>TOTAL INDIRECT SUPPORT COSTS 6</b>	<b>13,964,633</b>
	<b>TOTAL INSTRUCTIONAL ACTIVITY COSTS AND DIRECT SUPPORT COSTS, AND TOTAL INDIRECT SUPPORT COSTS (5 + 6) = TOTAL COSTS</b>	<b>53,858,362</b>
<b>SUPPORT COSTS ALLOCATION RATES</b>		
Indirect Support Costs Allocation Rate =	Total Indirect Support Costs (6) Total Instructional Activity Costs and Direct Support Costs (5)	35.00%
Direct Support Costs Allocation Rate =	Total Direct Support Costs (4) Total Instructional Activity Costs (3)	30.71%
Total Support Cost Allocation		65.71%

**MANDATED COSTS  
COLLECTIVE BARGAINING  
COMPONENT/ACTIVITY COST DETAIL**

**FORM  
CB-2**

(01) Claimant

Sierra Joint Community College District

(02) Fiscal Year Costs Were Incurred  
2002-2003

(03) Reimbursable Component: Check only one box per form to identify the component being claimed.

**Cost of Negotiations**

(04) Description of Expenses: Complete columns (a) through (f).

Object Accounts

(a) Employees Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel & Training	(g) Contracted Services
<b>Negotiating Certificated</b>						
Leland, Jean Personnel Assistant	\$42.75	54.80	\$2,342.70			
Martinez, Ron Director, Human Resources	\$94.39	43.80	\$4,134.28			
McKnight, Diane Associate Dean, Liberal Arts	\$73.81	8.30	\$612.62			
Smith, Doug V.P., Finance Admin.	\$85.93	39.00	\$3,351.27			
<b>Negotiating Classified</b>						
Epting-Davis, Carla Director	\$73.23	10.50	\$768.92			
Leland, Jean Personnel Assistant	\$42.75	94.70	\$4,048.42			
Martinez, Ron Director, Human Resources	\$94.39	107.70	\$10,165.80			
Smith, Doug V.P., Finance Admin.	\$85.93	96.50	\$8,292.25			
<b>Negotiations</b>						
Jacobson, Betts & Company Expenses: Management Consultant	\$100.00	122.50				\$12,249.90
<b>Negotiations Preparation</b>						
Allbee, Neal Associate Dean, Public Safety	\$79.47	16.00	\$1,271.52			
Bukey, John L. Attorney	\$125.00	15.00				\$1,875.00
Cunningham, Ray Asst Director Plant Operations	\$53.59	5.00	\$267.95			
(05) Total <input type="checkbox"/>	Subtotal <input checked="" type="checkbox"/>	Page: 1 of	\$35,255.73	\$0.00	0.00	\$14,124.90

**MANDATED COSTS  
COLLECTIVE BARGAINING  
COMPONENT/ACTIVITY COST DETAIL**

**FORM  
CB-2**

(01) Claimant: Sierra Joint Community College District  
 (02) Fiscal Year Costs Were Incurred: 2002-2003

(03) Reimbursable Component: Check only one box per form to identify the component being claimed.  
**Cost of Negotiations**

(04) Description of Expenses: Complete columns (a) through (f). Object Accounts

(a) Employees Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel & Training	(g) Contracted Services
Davis, Mandy Dean, Student Services	\$86.02	7.80	\$670.96			
Dollesin, Ninette Project Manager EP&S	\$51.15	3.00	\$153.45			
Epting-Davis, Carla Director	\$73.23	2.20	\$161.11			
Guevara, Stephanie Professor Business	\$45.32	9.50	\$430.54			
Haley, Brian Dean, Learning Resource Center	\$78.11	1.00	\$78.11			
Hamblen, John Residence Life Supervisor	\$33.05	1.00	\$33.05			
Helwick, Sue Manager Computer Ops	\$72.97	1.50	\$109.46			
Jackson, Darlene Assoc. Dean, Child Dev Ctr.	\$70.67	29.50	\$2,084.77			
Jacobson , Betts & Company Management Consultants	\$120.00	529.00				\$63,480.00
Johnson, Schachter and Collin Attorneys	\$135.00	19.10				\$2,578.50
Jung, Stephen Dean, Business High Tech.	\$80.95	3.50	\$283.33			
Kalina, Michelle Associate Dean, Science & Math	\$83.83	2.50	\$209.58			
Lee, Lawrence Assistant VP, IT	\$86.02	2.00	\$172.04			
Leland, Jean Personnel Assistant	\$42.75	356.40	\$15,236.10			
Ludutsky-Taylor, Tina	\$88.90	10.30	\$915.67			
(05) Total <input type="checkbox"/>	Subtotal <input checked="" type="checkbox"/>	Page: 2 of	\$20,806.09	\$0.00	0.00	\$66,058.50

**MANDATED COSTS  
COLLECTIVE BARGAINING  
COMPONENT/ACTIVITY COST DETAIL**

**FORM  
CB-2**

(01) Claimant

Sierra Joint Community College District

(02) Fiscal Year Costs Were Incurred  
2002-2003

(03) Reimbursable Component: Check only one box per form to identify the component being claimed.  
**Cost of Negotiations**

(04) Description of Expenses: Complete columns (a) through (f).

Object Accounts

(a) Employees Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel & Training	(g) Contracted Services
Executive Dean, WNCC						
Lynn, Morgan VP, EP and S	\$93.05	26.30	\$2,447.21			
Malfa, Dianne A. A. Child Dev Centers	\$38.87	4.50	\$174.92			
Martinez, Ron Director, Human Resources	\$94.39	228.70	\$21,586.99			
McClymonds, Judy Administrative Assistant	\$39.69	73.00	\$2,897.37			
McKnight, Diane Associate Dean, Liberal Arts	\$73.81	3.00	\$221.43			
Modder, Gail Project Manager	\$43.99	0.50	\$22.00			
Poland, Becky Admin Asst.	\$32.28	1.00	\$32.28			
Reader, Vicki Business Services Supervisor	\$68.11	6.30	\$429.09			
Smith, Doug V.P., Finance Admin.	\$85.93	112.30	\$9,649.94			
Sumner, Joann Assoc., Dean Curric.	\$86.31	1.50	\$129.47			
Walters-Dunlap, Karen Dean, Science & Math	\$78.11	3.00	\$234.33			
Wickstrom, Robert Director, Business Services	\$88.79	5.60	\$497.22			
<b>Negotiations Subject Committee</b>						
Bukey, John L. Attorney	\$125.00	10.50				\$1,312.50
Johnson, Schachter and Collin	\$135.00	60.10				\$8,113.50
(05) Total <input type="checkbox"/>	Subtotal <input checked="" type="checkbox"/>	Page: 3 of	\$39,237.92	\$0.00	0.00	\$9,426.00

**MANDATED COSTS  
COLLECTIVE BARGAINING  
COMPONENT/ACTIVITY COST DETAIL**

**FORM  
CB-2**

(01) Claimant

Sierra Joint Community College District

(02) Fiscal Year Costs Were Incurred

2002-2003

(03) Reimbursable Component: Check only one box per form to identify the component being claimed.

**Cost of Negotiations**

(04) Description of Expenses: Complete columns (a) through (f).

Object Accounts

(a) Employees Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel & Training	(g) Contracted Services
Attorneys						
<b>Negotiations-At Table</b>						
Bukey , John L. Attorney	\$125.00	219.25				\$27,406.25
Bukey, John L. Expenses - Attorney	\$100.00	11.56				\$1,156.45
(05) Total <input type="checkbox"/>	Subtotal <input checked="" type="checkbox"/>	Page: 4 of	\$0.00	\$0.00	0.00	\$36,676.20

**MANDATED COSTS  
COLLECTIVE BARGAINING  
COMPONENT/ACTIVITY COST DETAIL**

**FORM  
CB-2**

(01) Claimant:

Sierra Joint Community College District

(02) Fiscal Year Costs Were Incurred  
2002-2003

(03) Reimbursable Component: Check only one box per form to identify the component being claimed.

**Impasse Proceedings**

(04) Description of Expenses: Complete columns (a) through (f).

Object Accounts

(a) Employees Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel & Training	(g) Contracted Services
<b>Factfinding</b>						
Allbee, Neal Associate Dean, Public Safety	\$79.47	1.00	\$79.47			
Green, Dolly Manager, Diversity Programs	\$51.66	3.50	\$180.81			
Lee, Lawrence Assistant VP, IT	\$86.02	1.00	\$86.02			
Ludutsky-Taylor, Tina Executive Dean, WNCC	\$88.90	1.00	\$88.90			
Lynn, Morgan VP, EP and S	\$93.05	0.50	\$46.53			
<b>Mediation</b>						
Harris, Catherine Arbitrator Factfinder Mediator	\$100.00	19.00				\$1,900.00
(05) Total <input checked="" type="checkbox"/>			\$481.73	\$0.00	0.00	\$1,900.00
Subtotal <input type="checkbox"/>						

Page: 1 of 1



**MANDATED COSTS  
COLLECTIVE BARGAINING  
COMPONENT/ACTIVITY COST DETAIL**

**FORM  
CB-2**

(01) Claimant

Sierra Joint Community College District

(02) Fiscal Year Costs Were Incurred  
2002-2003

(03) Reimbursable Component: Check only one box per form to identify the component being claimed.

**Contract Administration**

(04) Description of Expenses: Complete columns (a) through (f).

Object Accounts

(a) Employees Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel & Training	(g) Contracted Services
<b>Contract Administration</b>						
Allbee, Neal Associate Dean, Public Safety	\$79.47	2.50	\$198.68			
Conway, Mary Dean of Physical Education	\$78.73	1.00	\$78.73			
Davis, Mandy Dean, Student Services	\$86.02	3.00	\$258.06			
Epting-Davis, Carla Director	\$73.23	0.50	\$36.62			
Green, Dolly Manager, Diversity Programs	\$51.66	11.00	\$568.26			
Guevara, Stephanie Professor Business	\$45.32	0.30	\$13.60			
Jackson, Darlene Assoc. Dean, Child Dev Ctr.	\$70.67	2.00	\$141.34			
Kalina, Michelle Associate Dean, Science & Math	\$83.83	3.00	\$251.49			
Leland, Jean Personnel Assistant	\$42.75	19.00	\$812.25			
Ludutsky-Taylor, Tina Executive Dean, WNCC	\$88.90	2.00	\$177.80			
Lynn, Morgan VP, EP and S	\$93.05	7.00	\$651.35			
Martinez, Ron Director, Human Resources	\$94.39	4.00	\$377.56			
Nicolay, Consulting Group Pension Consultants	\$100.00	79.00				\$7,900.00
Rehwald, Wende Health Nurse Practitioner	\$127.49	3.00	\$382.47			
(05) Total <input type="checkbox"/>	Subtotal <input checked="" type="checkbox"/>	Page: 1 of	\$3,948.20	\$0.00	0.00	\$7,900.00

**MANDATED COSTS  
COLLECTIVE BARGAINING  
COMPONENT/ACTIVITY COST DETAIL**

**FORM  
CB-2**

(01) Claimant

Sierra Joint Community College District

(02) Fiscal Year Costs Were Incurred  
2002-2003

(03) Reimbursable Component: Check only one box per form to identify the component being claimed.

**Contract Administration**

(04) Description of Expenses: Complete columns (a) through (f).

Object Accounts

(a) Employees Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel & Training	(g) Contracted Services
Smith, Doug V.P., Finance Admin.	\$85.93	3.50	\$300.76			
Wharff, Beverly Personnel Coordinator, HR	\$54.89	5.00	\$274.45			
<b>Contract Administration Committee</b>						
Allbee, Neal Associate Dean, Public Safety	\$79.47	18.90	\$1,501.98			
Brazil, Donna NCC Supervisor	\$46.36	0.80	\$37.09			
Conway, Mary Dean of Physical Education	\$78.73	10.80	\$850.28			
Culley, Christina Admin Assist Science/Math	\$42.71	3.00	\$128.13			
Cunningham, Ray Asst Director Plant Operations	\$53.59	1.60	\$85.74			
Davis, Mandy Dean, Student Services	\$86.02	20.10	\$1,729.00			
DeCourten, Frank Dean, Tahoe	\$80.59	16.10	\$1,297.50			
Dollesin, Ninette Project Manager EP&S	\$51.15	20.80	\$1,063.92			
Drennon, Sue Personnel Assistant	\$54.04	13.60	\$734.94			
Epting-Davis, Carla Director	\$73.23	15.10	\$1,105.77			
Green, Dolly Manager, Diversity Programs	\$51.66	2.30	\$118.82			
Guevara, Stephanie Professor Business	\$45.32	22.00	\$997.04			

(05) Total

Subtotal

Page: 2 of

\$10,607.90	\$0.00	0.00	\$0.00
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**MANDATED COSTS  
COLLECTIVE BARGAINING  
COMPONENT/ACTIVITY COST DETAIL**

**FORM  
CB-2**

(01) Claimant

Sierra Joint Community College District

(02) Fiscal Year Costs Were Incurred

2002-2003

(03) Reimbursable Component: Check only one box per form to identify the component being claimed.

**Contract Administration**

(04) Description of Expenses: Complete columns (a) through (f).

Object Accounts

(a) Employees Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel & Training	(g) Contracted Services
Haley, Brian Dean, Learning Resource Center	\$78.11	12.90	\$1,007.62			
Helwick, Sue Manager Computer Ops	\$72.97	1.30	\$94.86			
Jackson, Darlene Assoc. Dean, Child Dev Ctr.	\$70.67	17.90	\$1,264.99			
Jung, Stephen Dean, Business High Tech.	\$80.95	17.70	\$1,432.82			
Kalina, Michelle Associate Dean, Science & Math	\$83.83	13.30	\$1,114.94			
Kleinbach, Mary Executive Secretary, EP&S	\$47.42	13.30	\$630.69			
Lee, Lawrence Assistant VP, IT	\$86.02	1.60	\$137.63			
Leland, Jean Personnel Assistant	\$42.75	28.60	\$1,222.65			
Linde, Karen Athletic Director	\$69.91	13.10	\$915.82			
Ludutsky-Taylor, Tina Executive Dean, WNCC	\$88.90	20.80	\$1,849.12			
Lynn, Morgan VP, EP and S	\$93.05	20.50	\$1,907.53			
Mackey, Jennifer Asst Pgrm Manager	\$33.99	0.50	\$17.00			
Martinez, Ron Director, Human Resources	\$94.39	48.30	\$4,559.04			
McKinney, Roberta Admin Sec - Instr Stud Srvc	\$38.26	3.00	\$114.78			
McKnight, Diane Associate Dean, Liberal Arts	\$73.81	18.50	\$1,365.49			

(05) Total

Subtotal

Page: 3 of

\$18,632.00

\$0.00

0.00

\$0.00

**MANDATED COSTS  
COLLECTIVE BARGAINING  
COMPONENT/ACTIVITY COST DETAIL**

**FORM  
CB-2**

(01) Claimant

Sierra Joint Community College District

(02) Fiscal Year Costs Were Incurred  
2002-2003

(03) Reimbursable Component: Check only one box per form to identify the component being claimed.

**Contract Administration**

(04) Description of Expenses: Complete columns (a) through (f).

Object Accounts

(a) Employees Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel & Training	(g) Contracted Services
Michaels, Sue Supervisor, Marketing	\$49.96	0.50	\$24.98			
Nunnally, Delecia Assoc. Dean, Student Svcs	\$63.60	19.20	\$1,221.12			
Paulson, Jan Manager Systems / Programs	\$64.05	1.20	\$76.86			
Reader, Vicki Business Services Supervisor	\$68.11	2.50	\$170.28			
Roberts, Millie Executive Secretary	\$50.40	1.60	\$80.64			
Schneider, Greg Purchasing Supervisor	\$39.12	2.40	\$93.89			
Schwenk, Lonnie Chief of Police Services	\$48.85	0.80	\$39.08			
Scott, Sandra Director, Economic Dev.	\$74.75	14.20	\$1,061.45			
Smalley, Craig Data Admin	\$64.93	0.50	\$32.47			
Smith, Doug V.P., Finance Admin.	\$85.93	24.50	\$2,105.29			
Snyder, Scott Tech Support Manager	\$53.66	0.80	\$42.93			
Sumner, Joann Assoc., Dean Curric.	\$86.31	19.10	\$1,648.52			
Thiers, Laurie Program Manager, EP&S Interim	\$41.71	20.40	\$850.88			
Tsuji, Bill Dean, Liberal Arts	\$86.65	23.20	\$2,010.28			
Velazquez, Nilo	\$65.10	0.30	\$19.53			

(05) Total

Subtotal

Page: 4 of

\$10,843.67

\$0.00

0.00

\$0.00

**MANDATED COSTS  
COLLECTIVE BARGAINING  
COMPONENT/ACTIVITY COST DETAIL**

**FORM  
CB-2**

(01) Claimant

Sierra Joint Community College District

(02) Fiscal Year Costs Were Incurred  
2002-2003

(03) Reimbursable Component: Check only one box per form to identify the component being claimed.

**Contract Administration**

(04) Description of Expenses: Complete columns (a) through (f).

Object Accounts

(a) Employees Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel & Training	(g) Contracted Services
Bookstore Manager						
Volek, John Dean - PE Athletics	\$74.75	2.60	\$194.35			
Walters-Dunlap, Karen Dean, Science & Math	\$78.11	23.80	\$1,859.02			
White, Margeret Associate Director, Nursing	\$75.87	12.00	\$910.44			
Wickstrom, Robert Director, Business Services	\$88.79	3.80	\$337.40			
Wilson, Woodrow Director Planning & Research	\$78.11	2.10	\$164.03			
Wollesen, Mary Program Manager, SBDC & Ec Dev	\$59.08	1.10	\$64.99			
Yorde, Phil Technical Support Svcs Mgr	\$52.99	0.80	\$42.39			
<b>Contract Interpretation</b>						
Allbee, Neal Associate Dean, Public Safety	\$79.47	11.50	\$913.91			
Davis, Mandy Dean, Student Services	\$86.02	5.80	\$498.92			
Drennon, Sue Personnel Assistant	\$54.04	1.70	\$91.87			
Epting-Davis, Carla Director	\$73.23	6.30	\$461.35			
Green, Dolly Manager, Diversity Programs	\$51.66	24.50	\$1,265.67			
Guevara, Stephanie Professor Business	\$45.32	8.00	\$362.56			
Johnson, Schachter and Collin	\$135.00	13.20				\$1,782.00
(05) Total <input type="checkbox"/>	Subtotal <input checked="" type="checkbox"/>	Page: 5 of	\$7,186.42	\$0.00	0.00	\$1,782.00

**MANDATED COSTS  
COLLECTIVE BARGAINING  
COMPONENT/ACTIVITY COST DETAIL**

**FORM  
CB-2**

(01) Claimant

Sierra Joint Community College District

(02) Fiscal Year Costs Were Incurred  
2002-2003

(03) Reimbursable Component: Check only one box per form to identify the component being claimed.

**Contract Administration**

(04) Description of Expenses: Complete columns (a) through (f).

Object Accounts

(a) Employees Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel & Training	(g) Contracted Services
<b>Attorneys</b>						
Jung, Stephen Dean, Business High Tech.	\$80.95	1.00	\$80.95			
Lee, Lawrence Assistant VP, IT	\$86.02	2.00	\$172.04			
Leland, Jean Personnel Assistant	\$42.75	29.30	\$1,252.58			
Ludutsky-Taylor, Tina Executive Dean, WNCC	\$88.90	2.00	\$177.80			
Lynn, Morgan VP, EP and S	\$93.05	3.00	\$279.15			
Martinez, Ron Director, Human Resources	\$94.39	40.60	\$3,832.23			
Roberts, Millie Executive Secretary	\$50.40	0.20	\$10.08			
Scott, Sandra Director, Economic Dev.	\$74.75	1.00	\$74.75			
Smith, Doug V.P., Finance Admin.	\$85.93	0.50	\$42.97			
Wickstrom, Robert Director, Business Services	\$88.79	1.00	\$88.79			
<b>Grievances</b>						
Drennon, Sue Personnel Assistant	\$54.04	1.00	\$54.04			
Johnson, Schachter and Collin Attorneys	\$135.00	3.90				\$526.50
Martinez, Ron Director, Human Resources	\$94.39	1.00	\$94.39			
Reader, Vicki	\$68.11	1.00	\$68.11			
(05) Total <input type="checkbox"/>	Subtotal <input checked="" type="checkbox"/>	Page: 6 of	\$6,227.87	\$0.00	0.00	\$2,308.50



**MANDATED COSTS  
COLLECTIVE BARGAINING  
COMPONENT/ACTIVITY COST DETAIL**

**FORM  
CB-2**

(01) Claimant

Sierra Joint Community College District

(02) Fiscal Year Costs Were Incurred  
2002-2003

(03) Reimbursable Component: Check only one box per form to identify the component being claimed.

**Unfair Labor Practice Charges**

(04) Description of Expenses: Complete columns (a) through (f).

Object Accounts

(a) Employees Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel & Training	(g) Contracted Services
<b>Preparation for PERB Hearings</b> Martinez, Ron Director, Human Resources	\$94.39	12.80	\$1,208.19			
<b>Unfair Labor Disputes</b> Johnson, Schachter and Collin Attorneys	\$135.00	139.60				\$18,846.00
<b>(05) Total</b> <input checked="" type="checkbox"/>	<b>Subtotal</b> <input type="checkbox"/>	Page: 1 of 1	\$1,208.19	\$0.00	0.00	\$18,846.00



**Sierra Joint Community College District  
Collective Bargaining  
by Name**

Allbee, Neal - Associate Dean, Public Safety Salaried Employee	\$79.47
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
10/10/02	3.00	\$238.41	\$0.00	\$0.00 Contract Administration	Contract Administration Com
					Time spent working on Part-Time Faculty Workgroup Recollections
12/2/02	2.50	\$198.68	\$0.00	\$0.00 Contract Administration	Contract Administration
					Time spent working on contract administration issues
12/16/02	1.50	\$119.21	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
1/1/03	15.90	\$1,263.57	\$0.00	\$0.00 Contract Administration	Contract Administration Com
					Time spent in Dean's Council committee meetings.
1/1/03	2.50	\$198.68	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
1/1/03	3.50	\$278.15	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
1/1/03	1.50	\$119.21	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
1/1/03	3.00	\$238.41	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
1/1/03	1.50	\$119.21	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
2/4/03	1.00	\$79.47	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
3/21/03	1.50	\$119.21	\$0.00	\$0.00 Contract Administration	Contract Interpretation
					Time spent in contract interpretations
3/21/03	1.00	\$79.47	\$0.00	\$0.00 Impasse Proceedings	Factfinding
					Time spent preparing for factfinding
3/28/03	1.00	\$79.47	\$0.00	\$0.00 Contract Administration	Contract Interpretation
					Time spent in contract interpretations
3/28/03	1.00	\$79.47	\$0.00	\$0.00 Contract Administration	Contract Interpretation
					Time spent in contract interpretations
4/3/03	2.00	\$158.94	\$0.00	\$0.00 Contract Administration	Contract Interpretation
					Time spent in contract interpretations
4/3/03	2.00	\$158.94	\$0.00	\$0.00 Contract Administration	Contract Interpretation
					Time spent in contract interpretations
5/9/03	2.00	\$158.94	\$0.00	\$0.00 Contract Administration	Contract Interpretation
					Time spent in contract interpretations
5/22/03	1.50	\$119.21	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
5/27/03	2.00	\$158.94	\$0.00	\$0.00 Contract Administration	Contract Interpretation
					Time spent in contract interpretations
	<u>49.90</u>	<u>\$3,965.55</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Brazil, Donna - NCC Supervisor Salaried Employee	\$46.36
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
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**Sierra Joint Community College District  
Collective Bargaining  
by Name**

1/1/03	0.80	\$37.09	\$0.00	\$0.00	Contract Administration	Contract Administration Com
	<u>Time spent in Dean's Council committee meetings.</u>					
	0.80	\$37.09	\$0.00	\$0.00		

Bukey , John L. - Attorney Contracted Service	\$125.00
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	10.50	\$0.00	\$0.00	\$1,312.50	Cost of Negotiations
	Time spent in negotiations subject committee.				
1/1/03	15.00	\$0.00	\$0.00	\$1,875.00	Cost of Negotiations
	Time spent in negotiation preparations.				
1/1/03	219.25	\$0.00	\$0.00	\$27,406.25	Cost of Negotiations
	Time spent in at-table negotiations.				
	<u>244.75</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$30,593.75</u>	

Bukey, John L. - Expenses - Attorney Contracted Service	\$100.00
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	11.56	\$0.00	\$0.00	\$1,156.45	Cost of Negotiations
	Cost incurred regarding at-table negotiations.				
	<u>11.56</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$1,156.45</u>	

Conway, Mary - Dean of Physical Education Salaried Employee	\$78.73
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
8/13/02	1.00	\$78.73	\$0.00	\$0.00	Contract Administration
	Time spent working on contract administration issues				
10/10/02	3.00	\$236.19	\$0.00	\$0.00	Contract Administration
	Time spent working on Part-Time Faculty Workgroup Recollections				
1/1/03	7.80	\$614.09	\$0.00	\$0.00	Contract Administration
	Time spent in Dean's Council committee meetings.				
	<u>11.80</u>	<u>\$929.01</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Culley, Christina - Admin Assist Science/Math Salaried Employee	\$42.71
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
10/10/02	3.00	\$128.13	\$0.00	\$0.00	Contract Administration
	Time spent working on Part-Time Faculty Workgroup Recollections				
	<u>3.00</u>	<u>\$128.13</u>	<u>\$0.00</u>	<u>\$0.00</u>	

**Sierra Joint Community College District**  
**Collective Bargaining**  
**by Name**

Cunningham, Ray - Asst Director Plant Operations  
 Salaried Employee

\$53.59

<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	1.60	\$85.74	\$0.00	\$0.00 Contract Administration	Contract Administration Com
					Time spent in Dean's council committee meetings.
1/16/03	1.00	\$53.59	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
1/16/03	1.00	\$53.59	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
1/22/03	1.00	\$53.59	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
1/22/03	1.00	\$53.59	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
1/29/03	1.00	\$53.59	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
					<u>Time spent preparing for negotiations with classified staff</u>
	6.60	\$353.69	\$0.00	\$0.00	

Davis, Mandy - Dean, Student Services  
 Salaried Employee

\$86.02

<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
8/14/02	2.00	\$172.04	\$0.00	\$0.00 Contract Administration	Contract Administration
					Time spent working on contract administration issues
11/20/02	1.00	\$86.02	\$0.00	\$0.00 Contract Administration	Contract Administration
					Time spent working on contract administration issues
12/16/02	1.00	\$86.02	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
1/1/03	20.10	\$1,729.00	\$0.00	\$0.00 Contract Administration	Contract Administration Com
					Time spent in Dean's Council committee meetings.
1/1/03	0.30	\$25.81	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent with attorneys from Johnson, Schachter, and Collins in negotiations preparations.
1/10/03	2.00	\$172.04	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
2/3/03	0.50	\$43.01	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
2/10/03	1.00	\$86.02	\$0.00	\$0.00 Contract Administration	Contract Interpretation
					Time spent in contract interpretations
3/20/03	1.80	\$154.84	\$0.00	\$0.00 Contract Administration	Contract Interpretation
					Time spent in contract interpretations
3/27/03	2.00	\$172.04	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
4/2/03	1.00	\$86.02	\$0.00	\$0.00 Contract Administration	Contract Interpretation
					Time spent in contract interpretations
4/4/03	2.00	\$172.04	\$0.00	\$0.00 Contract Administration	Contract Interpretation
					Time spent in contract interpretations

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4/22/03	2.00	\$172.04	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	<u>Time spent preparing for negotiations with classified staff</u>					
	36.70	\$3,156.93	\$0.00	\$0.00		

DeCourten, Frank - Dean, Tahoe Salaried Employee	\$80.59
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	16.10	\$1,297.50	\$0.00	\$0.00	Contract Administration
	<u>Time spent in Dean's Council committee meetings.</u>				
	16.10	\$1,297.50	\$0.00	\$0.00	

Dollesin, Ninette - Project Manager EP&S Salaried Employee	\$51.15
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	20.80	\$1,063.92	\$0.00	\$0.00	Contract Administration
	<u>Time spent in Dean's Council committee meetings.</u>				
3/10/03	1.00	\$51.15	\$0.00	\$0.00	Cost of Negotiations
	<u>Time spent preparing for negotiations with certificated staff</u>				
3/18/03	0.50	\$25.58	\$0.00	\$0.00	Cost of Negotiations
	<u>Time spent preparing for negotiations with certificated staff</u>				
4/4/03	1.50	\$76.73	\$0.00	\$0.00	Cost of Negotiations
	<u>Time spent preparing for negotiations with certificated staff</u>				
	23.80	\$1,217.37	\$0.00	\$0.00	

Drennon, Sue - Personnel Assistant Salaried Employee	\$54.04
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
12/5/02	1.30	\$70.25	\$0.00	\$0.00	Contract Administration
	<u>Time spent in Joint Labor Management Committee meeting.</u>				
1/23/03	1.30	\$70.25	\$0.00	\$0.00	Contract Administration
	<u>Time spent in Joint Labor Management Committee meeting.</u>				
2/27/03	1.70	\$91.87	\$0.00	\$0.00	Contract Administration
	<u>Time spent preparing for Joint Labor Management Committee meeting</u>				
2/27/03	3.00	\$162.12	\$0.00	\$0.00	Contract Administration
	<u>Time spent in Joint Labor Management Committee meeting.</u>				
3/27/03	4.00	\$216.16	\$0.00	\$0.00	Contract Administration
	<u>Time spent in Joint Labor Management Committee meeting.</u>				
4/9/03	1.00	\$54.04	\$0.00	\$0.00	Contract Administration
	<u>Time spent working on grievances</u>				
4/24/03	2.00	\$108.08	\$0.00	\$0.00	Contract Administration
	<u>Time spent in Joint Labor Management Committee meeting</u>				
'20/03	2.00	\$108.08	\$0.00	\$0.00	Contract Administration

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Time spent in Joint Labor Management Committee meeting.  
16.30      \$880.85      \$0.00      \$0.00

Epting-Davis, Carla - Director Salaried Employee	\$73.23
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
8/1/02	0.50	\$36.62	\$0.00	\$0.00 Contract Administration	Contract Administration
					Time spent working on contract administration issues
1/1/03	15.10	\$1,105.77	\$0.00	\$0.00 Contract Administration	Contract Administration Com
					Time spent in Dean's Council committee meetings.
1/1/03	1.50	\$109.85	\$0.00	\$0.00 Contract Administration	Contract Interpretation
					Time spent in contract interpretations
1/1/03	3.00	\$219.69	\$0.00	\$0.00 Contract Administration	Contract Interpretation
					Time spent in contract interpretations
1/1/03	1.00	\$73.23	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
1/1/03	10.50	\$768.92	\$0.00	\$0.00 Cost of Negotiations	Negotiating Classified
					Time spent in At-Table Negotiations with classified staff.
1/1/03	0.20	\$14.65	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent with attorneys from Johnson, Schachter, and Collins in negotiations preparations.
1/29/03	1.00	\$73.23	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
3/20/03	1.80	\$131.81	\$0.00	\$0.00 Contract Administration	Contract Interpretation
					Time spent in contract interpretations
	<u>34.60</u>	<u>\$2,533.76</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Green, Dolly - Manager, Diversity Programs Salaried Employee	\$51.66
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	3.50	\$180.81	\$0.00	\$0.00 Impasse Proceedings	Factfinding
					Time spent preparing for factfinding
1/1/03	3.00	\$154.98	\$0.00	\$0.00 Contract Administration	Contract Interpretation
					Time spent in contract interpretations
1/1/03	21.50	\$1,110.69	\$0.00	\$0.00 Contract Administration	Contract Interpretation
					Time spent in contract interpretations
1/1/03	11.00	\$568.26	\$0.00	\$0.00 Contract Administration	Contract Administration
					Time spent working on contract administration issues
1/1/03	2.30	\$118.82	\$0.00	\$0.00 Contract Administration	Contract Administration Com
					Time spent in Dean's Council committee meetings.
	<u>41.30</u>	<u>\$2,133.56</u>	<u>\$0.00</u>	<u>\$0.00</u>	

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Guevara, Stephanie - Professor Business Salaried Employee	\$45.32
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
11/23/02	1.00	\$45.32	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
12/13/02	0.30	\$13.60	\$0.00	\$0.00 Contract Administration	Contract Administration
					Time spent working on contract administration issues
1/1/03	22.00	\$997.04	\$0.00	\$0.00 Contract Administration	Contract Administration Comu
					Time spent in Dean's Council committee meetings.
1/1/03	8.00	\$362.56	\$0.00	\$0.00 Contract Administration	Contract Interpretation
					Time spent in contract interpretations
1/24/03	1.00	\$45.32	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
1/28/03	1.00	\$45.32	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
1/30/03	0.50	\$22.66	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
2/4/03	1.00	\$45.32	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
2/11/03	1.00	\$45.32	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
3/7/03	1.00	\$45.32	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
3/18/03	0.50	\$22.66	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
4/4/03	1.50	\$67.98	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
6/9/03	1.00	\$45.32	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
	<u>39.80</u>	<u>\$1,803.74</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Haley, Brian - Dean, Learning Resource Center Salaried Employee	\$78.11
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	12.90	\$1,007.62	\$0.00	\$0.00 Contract Administration	Contract Administration Comu
					Time spent in Dean's Council committee meetings.
5/6/03	1.00	\$78.11	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
	<u>13.90</u>	<u>\$1,085.73</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Hamblen, John - Residence Life Supervisor Salaried Employee	\$33.05
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
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1/29/03	1.00	\$33.05	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	<u>Time spent preparing for negotiations with classified staff</u>					
	1.00	\$33.05	\$0.00	\$0.00		

Harris, Catherine - Arbitrator Factfinder Mediator Contracted Service	\$100.00
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
2/28/03	19.00	\$0.00	\$0.00	\$1,900.00	Impasse Proceedings Mediation
	<u>Cost of Arbitrator for Faculty Retiree's Arbitration Proceedings.</u>				
	19.00	\$0.00	\$0.00	\$1,900.00	

Helwick, Sue - Manager Computer Ops Salaried Employee	\$72.97
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	1.30	\$94.86	\$0.00	\$0.00	Contract Administration
	Time spent in Dean's Council committee meetings.				
3/14/03	1.00	\$72.97	\$0.00	\$0.00	Cost of Negotiations
	Time spent preparing for negotiations with classified staff				
4/9/03	0.50	\$36.49	\$0.00	\$0.00	Cost of Negotiations
	Time spent preparing for negotiations with classified staff				
	2.80	\$204.32	\$0.00	\$0.00	

Jackson, Darlene - Assoc. Dean, Child Dev Ctr. Salaried Employee	\$70.67
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
8/16/02	2.00	\$141.34	\$0.00	\$0.00	Contract Administration
	Time spent working on contract administration issues				
12/19/02	2.00	\$141.34	\$0.00	\$0.00	Cost of Negotiations
	Time spent preparing for negotiations with certificated staff				
1/1/03	17.90	\$1,264.99	\$0.00	\$0.00	Contract Administration
	Time spent in Dean's Council committee meetings.				
1/1/03	22.50	\$1,590.08	\$0.00	\$0.00	Cost of Negotiations
	Time spent preparing for negotiations with classified staff				
2/5/03	3.00	\$212.01	\$0.00	\$0.00	Cost of Negotiations
	Time spent preparing for negotiations with classified staff				
2/19/03	1.00	\$70.67	\$0.00	\$0.00	Cost of Negotiations
	Time spent preparing for negotiations with classified staff				
3/6/03	1.00	\$70.67	\$0.00	\$0.00	Cost of Negotiations
	Time spent preparing for negotiations with certificated staff				
	49.40	\$3,491.10	\$0.00	\$0.00	

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Jacobson , Betts & Company - Management Consultants Contracted Service	\$120.00
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	529.00	\$0.00	\$0.00	\$63,480.00	Cost of Negotiations
	Time spent in negotiation preparations.				
	<u>529.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$63,480.00</u>	

Jacobson, Betts & Company - Expenses:Management Consultant Contracted Service	\$100.00
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	122.50	\$0.00	\$0.00	\$12,249.90	Cost of Negotiations
	Cost incurred regarding negotiations.				
	<u>122.50</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$12,249.90</u>	

Johnson, Schachter and Collin - Attorneys Contracted Service	\$135.00
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	139.60	\$0.00	\$0.00	\$18,846.00	Unfair Labor Practice Charge
	Time spent in unfair labor practices.				
1/1/03	13.20	\$0.00	\$0.00	\$1,782.00	Contract Administration
	Time spent in contract interpretations.				
1/1/03	3.90	\$0.00	\$0.00	\$526.50	Contract Administration
	Time spent in dealing with tenure grievances.				
1/1/03	60.10	\$0.00	\$0.00	\$8,113.50	Cost of Negotiations
	Time spent in negotiations subject committee.				
1/1/03	19.10	\$0.00	\$0.00	\$2,578.50	Cost of Negotiations
	Time spent in negotiations preparations.				
	<u>235.90</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$31,846.50</u>	

Jung, Stephen - Dean, Business High Tech. Salaried Employee	\$80.95
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
10/21/02	1.50	\$121.43	\$0.00	\$0.00	Cost of Negotiations
	Time spent preparing for negotiations with certificated staff				
1/1/03	17.70	\$1,432.82	\$0.00	\$0.00	Contract Administration
	Time spent in Dean's Council committee meetings.				
1/24/03	1.00	\$80.95	\$0.00	\$0.00	Cost of Negotiations
	Time spent preparing for negotiations with classified staff				
5/1/03	1.00	\$80.95	\$0.00	\$0.00	Contract Administration
	Time spent in contract interpretations				



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5/6/03	1.00	\$80.95	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	<u>Time spent preparing for negotiations with classified staff</u>					
	22.20	\$1,797.09	\$0.00	\$0.00		

Kalina, Michelle - Associate Dean, Science & Math Salaried Employee	\$83.83
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
8/14/02	1.00	\$83.83	\$0.00	\$0.00	Contract Administration
	Time spent working on contract administration issues				
10/10/02	3.00	\$251.49	\$0.00	\$0.00	Contract Administration
	Time spent working on Part-Time Faculty Workgroup Recollections				
10/21/02	1.50	\$125.75	\$0.00	\$0.00	Cost of Negotiations
	Time spent preparing for negotiations with certificated staff				
10/23/02	2.00	\$167.66	\$0.00	\$0.00	Contract Administration
	Time spent working on Part-Time Faculty Workgroup Recollections				
1/1/03	2.00	\$167.66	\$0.00	\$0.00	Contract Administration
	Time spent working on contract administration issues				
1/1/03	8.30	\$695.79	\$0.00	\$0.00	Contract Administration
	Time spent in Dean's Council committee meetings.				
2/10/03	1.00	\$83.83	\$0.00	\$0.00	Cost of Negotiations
	<u>Time spent preparing for negotiations with certificated staff</u>				
	18.80	\$1,576.00	\$0.00	\$0.00	

Kleinbach, Mary - Executive Secretary, EP&S Salaried Employee	\$47.42
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	13.30	\$630.69	\$0.00	\$0.00	Contract Administration
	<u>Time spent in Dean's Council committee meetings.</u>				
	13.30	\$630.69	\$0.00	\$0.00	

Lee, Lawrence - Assistant VP, IT Salaried Employee	\$86.02
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	1.60	\$137.63	\$0.00	\$0.00	Contract Administration
	Time spent in Dean's Council committee meetings.				
3/14/03	1.00	\$86.02	\$0.00	\$0.00	Contract Administration
	Time spent in contract interpretations				
3/21/03	1.00	\$86.02	\$0.00	\$0.00	Contract Administration
	Time spent in contract interpretations				
3/21/03	1.00	\$86.02	\$0.00	\$0.00	Impasse Proceedings
	Time spent preparing for factfinding				
4/22/03	2.00	\$172.04	\$0.00	\$0.00	Cost of Negotiations
	Negotiations Preparation				

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Time spent preparing for negotiations with classified staff  
6.60      \$567.73      \$0.00      \$0.00

Leland, Jean - Personnel Assistant Salaried Employee	\$42.75
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
9/5/02	0.50	\$21.38	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
				Time spent preparing for negotiations with classified staff	
9/5/02	0.50	\$21.38	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
				Time spent preparing for negotiations with certificated staff	
9/16/02	2.50	\$106.88	\$0.00	\$0.00 Contract Administration	Contract Administration Com
				Time spent in Joint Labor Management Committee meeting.	
9/16/02	1.00	\$42.75	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
				Time spent preparing for negotiations with classified staff	
9/17/02	2.00	\$85.50	\$0.00	\$0.00 Contract Administration	Contract Administration Com
				Time spent in Joint Labor Management Committee meeting.	
9/19/02	1.70	\$72.68	\$0.00	\$0.00 Contract Administration	Contract Administration Com
				Time spent in Joint Labor Management Committee meeting.	
9/26/02	0.50	\$21.38	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
				Time spent preparing for negotiations with certificated staff	
10/10/02	3.00	\$128.25	\$0.00	\$0.00 Contract Administration	Contract Administration Com
				Time spent working on Part-Time Faculty Workgroup Recollections	
10/23/02	3.00	\$128.25	\$0.00	\$0.00 Contract Administration	Contract Administration Com
				Time spent working on Part-Time Faculty Workgroup Recollections	
11/25/02	0.50	\$21.38	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
				Time spent preparing for negotiations with certificated staff	
12/2/02	0.50	\$21.38	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
				Time spent preparing for negotiations with certificated staff	
12/5/02	1.30	\$55.57	\$0.00	\$0.00 Contract Administration	Contract Administration Com
				Time spent in Joint Labor Management Committee meeting.	
1/1/03	19.00	\$812.25	\$0.00	\$0.00 Contract Administration	Contract Administration
				Time spent working on contract administration issues	
1/1/03	0.30	\$12.83	\$0.00	\$0.00 Contract Administration	Contract Interpretation
				Time spent with attorneys from Johnson, Schachter, and Collins in contract interpretations.	
1/1/03	29.00	\$1,239.75	\$0.00	\$0.00 Contract Administration	Contract Interpretation
				Time spent in contract interpretations	
1/1/03	4.80	\$205.20	\$0.00	\$0.00 Contract Administration	Contract Administration Com
				Time spent in Dean's Council committee meetings.	
1/1/03	94.70	\$4,048.42	\$0.00	\$0.00 Cost of Negotiations	Negotiating Classified
				Time spent in At-Table Negotiations with classified staff.	
1/1/03	41.30	\$1,765.57	\$0.00	\$0.00 Cost of Negotiations	Negotiating Certificated
				Time spent in At-Table Negotiations with certificated staff.	
1/1/03	13.50	\$577.13	\$0.00	\$0.00 Cost of Negotiations	Negotiating Certificated
				Time spent in at-table negotiations with certificated staff	
1/1/03	190.70	\$8,152.42	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
				Time spent preparing for negotiations with classified staff	
1/1/03	153.20	\$6,549.30	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
				Time spent preparing for negotiations with certificated staff	

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1/23/03	1.30	\$55.57	\$0.00	\$0.00	Contract Administration	Contract Administration Com
	Time spent in Joint Labor Management Committee meeting.					
2/10/03	0.50	\$21.38	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
2/27/03	3.00	\$128.25	\$0.00	\$0.00	Contract Administration	Contract Administration Com
	Time spent in Joint Labor Management Committee meeting.					
3/6/03	0.50	\$21.38	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
3/20/03	2.00	\$85.50	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
3/27/03	4.00	\$171.00	\$0.00	\$0.00	Contract Administration	Contract Administration Com
	Time spent in Joint Labor Management Committee meeting.					
4/23/03	3.00	\$128.25	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
4/29/03	1.00	\$42.75	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
5/8/03	0.50	\$21.38	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
5/14/03	1.00	\$42.75	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
5/15/03	0.50	\$21.38	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
5/20/03	2.00	\$85.50	\$0.00	\$0.00	Contract Administration	Contract Administration Com
	Time spent in Joint Labor Management Committee meeting.					
	<u>582.80</u>	<u>\$24,914.70</u>	<u>\$0.00</u>	<u>\$0.00</u>		

Linde, Karen - Athletic Director Salaried Employee	\$69.91
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	13.10	\$915.82	\$0.00	\$0.00	Contract Administration
	Time spent in Dean's Council committee meetings.				
	<u>13.10</u>	<u>\$915.82</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Ludutsky-Taylor, Tina - Executive Dean, WNCC Salaried Employee	\$88.90
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
10/10/02	3.00	\$266.70	\$0.00	\$0.00	Contract Administration
	Time spent working on Part-Time Faculty Workgroup Recollections				
12/16/02	1.50	\$133.35	\$0.00	\$0.00	Cost of Negotiations
	Time spent preparing for negotiations with certificated staff				
1/1/03	2.00	\$177.80	\$0.00	\$0.00	Contract Administration
	Time spent working on contract administration issues				
1/1/03	17.80	\$1,582.42	\$0.00	\$0.00	Contract Administration
	Time spent in Dean's Council committee meetings.				
1/1/03	2.80	\$248.92	\$0.00	\$0.00	Cost of Negotiations

**Sierra Joint Community College District  
Collective Bargaining  
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	Time spent preparing for negotiations with classified staff				
1/1/03	6.00	\$533.40	\$0.00	\$0.00	Cost of Negotiations
					Negotiations Preparation
	Time spent preparing for negotiations with certificated staff				
3/20/03	1.00	\$88.90	\$0.00	\$0.00	Impasse Proceedings
					Factfinding
	Time spent preparing for factfinding				
5/9/03	2.00	\$177.80	\$0.00	\$0.00	Contract Administration
					Contract Interpretation
	<u>Time spent in contract interpretations</u>				
	<u>36.10</u>	<u>\$3,209.29</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Lynn, Morgan - VP, EP and S Salaried Employee	\$93.05
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
8/13/02	1.00	\$93.05	\$0.00	\$0.00	Contract Administration
					Contract Administration
	Time spent working on contract administration issues				
9/13/02	4.00	\$372.20	\$0.00	\$0.00	Cost of Negotiations
					Negotiations Preparation
	Time spent preparing for negotiations with certificated staff				
11/20/02	1.00	\$93.05	\$0.00	\$0.00	Contract Administration
					Contract Administration
	Time spent working on contract administration issues				
11/20/02	1.00	\$93.05	\$0.00	\$0.00	Cost of Negotiations
					Negotiations Preparation
	Time spent preparing for negotiations with certificated staff				
12/16/02	1.50	\$139.58	\$0.00	\$0.00	Cost of Negotiations
					Negotiations Preparation
	Time spent preparing for negotiations with certificated staff				
12/19/02	2.00	\$186.10	\$0.00	\$0.00	Cost of Negotiations
					Negotiations Preparation
	Time spent preparing for negotiations with certificated staff				
12/19/02	1.80	\$167.49	\$0.00	\$0.00	Cost of Negotiations
					Negotiations Preparation
	Time spent preparing for negotiations with certificated staff				
1/1/03	5.00	\$465.25	\$0.00	\$0.00	Contract Administration
					Contract Administration
	Time spent working on contract administration issues				
1/1/03	20.50	\$1,907.53	\$0.00	\$0.00	Contract Administration
					Contract Administration Com
	Time spent in Dean's Council committee meetings.				
1/10/03	0.50	\$46.53	\$0.00	\$0.00	Contract Administration
					Contract Interpretation
	Time spent in contract interpretations				
1/10/03	2.00	\$186.10	\$0.00	\$0.00	Cost of Negotiations
					Negotiations Preparation
	Time spent preparing for negotiations with certificated staff				
1/24/03	1.00	\$93.05	\$0.00	\$0.00	Cost of Negotiations
					Negotiations Preparation
	Time spent preparing for negotiations with classified staff				
1/30/03	0.50	\$46.53	\$0.00	\$0.00	Cost of Negotiations
					Negotiations Preparation
	Time spent preparing for negotiations with certificated staff				
2/5/03	2.00	\$186.10	\$0.00	\$0.00	Cost of Negotiations
					Negotiations Preparation
	Time spent preparing for negotiations with certificated staff				
2/5/03	1.00	\$93.05	\$0.00	\$0.00	Cost of Negotiations
					Negotiations Preparation
	Time spent preparing for negotiations with classified staff				
2/10/03	1.00	\$93.05	\$0.00	\$0.00	Cost of Negotiations
					Negotiations Preparation
	Time spent preparing for negotiations with certificated staff				
2/19/03	1.00	\$93.05	\$0.00	\$0.00	Cost of Negotiations
					Negotiations Preparation
	Time spent preparing for negotiations with classified staff				
3/6/03	1.00	\$93.05	\$0.00	\$0.00	Cost of Negotiations
					Negotiations Preparation
	Time spent preparing for negotiations with certificated staff				

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3/10/03	1.00	\$93.05	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
3/11/03	2.00	\$186.10	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
3/12/03	2.00	\$186.10	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
3/20/03	0.50	\$46.53	\$0.00	\$0.00	Impasse Proceedings	Factfinding
	Time spent preparing for factfinding					
4/3/03	0.50	\$46.53	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
4/25/03	1.00	\$93.05	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
5/7/03	0.50	\$46.53	\$0.00	\$0.00	Contract Administration	Contract Interpretation
	Time spent in contract interpretations					
5/9/03	2.00	\$186.10	\$0.00	\$0.00	Contract Administration	Contract Interpretation
	Time spent in contract interpretations					
	<u>57.30</u>	<u>\$5,331.76</u>	<u>\$0.00</u>	<u>\$0.00</u>		

Mackey, Jennifer - Asst Pgrm Manager Salaried Employee	\$33.99
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
7/1/03	0.50	\$17.00	\$0.00	\$0.00	Contract Administration
	Time spent in Dean's Council committee meetings.				
	<u>0.50</u>	<u>\$17.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Malfa, Dianne - A. A. Child Dev Centers Salaried Employee	\$38.87
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
10/14/02	0.50	\$19.44	\$0.00	\$0.00	Cost of Negotiations
	Time spent preparing for negotiations with classified staff				
1/1/03	2.00	\$77.74	\$0.00	\$0.00	Cost of Negotiations
	Time spent preparing for negotiations with classified staff				
2/10/03	2.00	\$77.74	\$0.00	\$0.00	Cost of Negotiations
	Time spent preparing for negotiations with classified staff				
	<u>4.50</u>	<u>\$174.92</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Martinez, Ron - Director, Human Resources Salaried Employee	\$94.39
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
7/15/02	1.00	\$94.39	\$0.00	\$0.00	Contract Administration
	Time spent working on grievance issues				
7/16/02	1.00	\$94.39	\$0.00	\$0.00	Contract Administration
	Contract Interpretation				

**Sierra Joint Community College District**  
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	Time spent in contract interpretations					
8/1/02	0.50	\$47.20	\$0.00	\$0.00	Contract Administration	Contract Administration
	Time spent working on contract administration issues					
8/5/02	8.00	\$755.12	\$0.00	\$0.00	Contract Administration	Contract Administration Com
	Time spent in Joint Labor Management Committee meeting.					
8/6/02	4.00	\$377.56	\$0.00	\$0.00	Unfair Labor Practice Char	Preparation for PERB Hearing
	Time spent preparing for PERB hearing					
8/12/02	2.00	\$188.78	\$0.00	\$0.00	Contract Administration	Contract Administration
	Time spent working on contract administration issues					
8/26/02	0.60	\$56.63	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
8/26/02	0.60	\$56.63	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
8/30/02	1.50	\$141.59	\$0.00	\$0.00	Contract Administration	Contract Administration
	Time spent working on contract administration issues					
9/4/02	1.00	\$94.39	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent in negotiations preparations with classified staff					
9/5/02	0.50	\$47.20	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
9/5/02	0.50	\$47.20	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
9/16/02	1.30	\$122.71	\$0.00	\$0.00	Contract Administration	Contract Administration Com
	Time spent in Joint Labor Management Committee meeting.					
9/16/02	0.50	\$47.20	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
9/16/02	0.50	\$47.20	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
9/16/02	1.00	\$94.39	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
9/19/02	1.70	\$160.46	\$0.00	\$0.00	Contract Administration	Contract Administration Com
	Time spent in Joint Labor Management Committee meeting.					
10/7/02	3.50	\$330.37	\$0.00	\$0.00	Unfair Labor Practice Char	Preparation for PERB Hearing
	Time spent preparing for PERB hearing					
10/7/02	7.00	\$660.73	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
10/10/02	3.00	\$283.17	\$0.00	\$0.00	Contract Administration	Contract Administration Com
	Time spent working on Part-Time Faculty Workgroup Recollections					
10/14/02	3.00	\$283.17	\$0.00	\$0.00	Contract Administration	Contract Interpretation
	Time spent in contract interpretations					
10/15/02	4.00	\$377.56	\$0.00	\$0.00	Contract Administration	Contract Interpretation
	Time spent in contract interpretations					
10/16/02	8.00	\$755.12	\$0.00	\$0.00	Contract Administration	Contract Interpretation
	Time spent in contract interpretations					
10/17/02	8.00	\$755.12	\$0.00	\$0.00	Contract Administration	Contract Interpretation
	Time spent in contract interpretations					
10/18/02	8.00	\$755.12	\$0.00	\$0.00	Contract Administration	Contract Interpretation
	Time spent in contract interpretations					
10/21/02	0.50	\$47.20	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
10/22/02	6.50	\$613.54	\$0.00	\$0.00	Contract Administration	Contract Interpretation
	Time spent in contract interpretations					

**Sierra Joint Community College District**  
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12/16/03

10/23/02	2.00	\$188.78	\$0.00	\$0.00	Contract Administration	Contract Administration Com
	Time spent working on Part-Time Faculty Workgroup Recollections					
10/23/02	1.40	\$132.15	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
10/23/02	1.40	\$132.15	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
12/4/02	0.80	\$75.51	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
12/5/02	1.30	\$122.71	\$0.00	\$0.00	Contract Administration	Contract Administration Com
	Time spent in Joint Labor Management Committee meeting.					
1/1/03	5.30	\$500.27	\$0.00	\$0.00	Unfair Labor Practice Char	Preparation for PERB Hearing
	Time spent with attorneys from Johnson, Schachter and Collins preparing for PERB hearings					
1/1/03	0.10	\$9.44	\$0.00	\$0.00	Contract Administration	Contract Interpretation
	Time spent with attorneys from Johnson, Schachter and Collins in contract interpretations					
1/1/03	20.70	\$1,953.87	\$0.00	\$0.00	Contract Administration	Contract Administration Com
	Time spent in Dean's Council committee meetings.					
1/1/03	107.70	\$10,165.80	\$0.00	\$0.00	Cost of Negotiations	Negotiating Classified
	Time spent in At-Table Negotiations with classified staff.					
1/1/03	43.80	\$4,134.28	\$0.00	\$0.00	Cost of Negotiations	Negotiating Certificated
	Time spent in At-Table Negotiations with certificated staff.					
1/1/03	101.50	\$9,580.59	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
1/1/03	0.60	\$56.63	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent with attorneys from Johnson, Schachter and Collins preparing for negotiations					
1/1/03	107.00	\$10,099.73	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
1/23/03	1.30	\$122.71	\$0.00	\$0.00	Contract Administration	Contract Administration Com
	Time spent in Joint Labor Management Committee meeting.					
2/10/03	0.50	\$47.20	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
2/13/03	0.50	\$47.20	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
2/27/03	3.00	\$283.17	\$0.00	\$0.00	Contract Administration	Contract Administration Com
	Time spent in Joint Labor Management Committee meeting.					
3/6/03	0.50	\$47.20	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
3/27/03	4.00	\$377.56	\$0.00	\$0.00	Contract Administration	Contract Administration Com
	Time spent in Joint Labor Management Committee meeting.					
3/27/03	0.90	\$84.95	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
3/27/03	0.90	\$84.95	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
5/9/03	2.00	\$188.78	\$0.00	\$0.00	Contract Administration	Contract Interpretation
	Time spent in contract interpretations					
5/20/03	2.00	\$188.78	\$0.00	\$0.00	Contract Administration	Contract Administration Com
	Time spent in Joint Labor Management Committee meeting.					
	<u>486.90</u>	<u>\$45,958.49</u>	<u>\$0.00</u>	<u>\$0.00</u>		

**Sierra Joint Community College District  
Collective Bargaining  
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McClymonds, Judy - Administrative Assistant Salaried Employee	\$39.69
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	72.00	\$2,857.68	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
3/10/03	1.00	\$39.69	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
	<u>73.00</u>	<u>\$2,897.37</u>	<u>\$0.00</u>	<u>\$0.00</u>	

McKinney, Roberta - Admin Sec - Instr Stud Srvc Salaried Employee	\$38.26
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
10/10/02	3.00	\$114.78	\$0.00	\$0.00 Contract Administration	Contract Administration Com
					Time spent working on Part-Time Faculty Workgroup Recollections
	<u>3.00</u>	<u>\$114.78</u>	<u>\$0.00</u>	<u>\$0.00</u>	

McKnight, Diane - Associate Dean, Liberal Arts Salaried Employee	\$73.81
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
10/23/02	2.00	\$147.62	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent working on Part-Time Faculty Workgroup Recollections
1/1/03	18.50	\$1,365.49	\$0.00	\$0.00 Contract Administration	Contract Administration Com
					Time spent in Dean's Council committee meetings.
1/1/03	4.80	\$354.29	\$0.00	\$0.00 Cost of Negotiations	Negotiating Certificated
					Time spent in At-Table Negotiations with certificated staff.
5/14/03	1.00	\$73.81	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with certificated staff
5/22/03	2.00	\$147.62	\$0.00	\$0.00 Cost of Negotiations	Negotiating Certificated
					Time spent in at-table negotiations with certificated staff
5/29/03	1.50	\$110.72	\$0.00	\$0.00 Cost of Negotiations	Negotiating Certificated
					Time spent in at-table negotiations with certificated staff
	<u>29.80</u>	<u>\$2,199.54</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Michaels, Sue - Supervisor, Marketing Salaried Employee	\$49.96
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	0.50	\$24.98	\$0.00	\$0.00 Contract Administration	Contract Administration Com
					Time spent in Dean's Council committee meetings.
	<u>0.50</u>	<u>\$24.98</u>	<u>\$0.00</u>	<u>\$0.00</u>	



**Sierra Joint Community College District  
Collective Bargaining  
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Modder, Gail - Project Manager Salaried Employee	\$43.99
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/7/03	0.50	\$22.00	\$0.00	\$0.00	Cost of Negotiations
	Time spent preparing for negotiations with classified staff				
	0.50	\$22.00	\$0.00	\$0.00	Negotiations Preparation

Nicolay , Consulting Group - Pension Consultants Contracted Service	\$100.00
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	79.00	\$0.00	\$0.00	\$7,900.00	Contract Administration
	Cost of consulting services to assist in the administration of postretirement healthcare programs.				
	79.00	\$0.00	\$0.00	\$7,900.00	Contract Administration

No Reported Data, No Costs - Salaried Employee	\$0.00
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	0.00	\$0.00	\$0.00	\$0.00	Collective Bargaining Agre: Disclosure Forms and Docum
1/1/03	0.00	\$0.00	\$0.00	\$0.00	Election of Unit Representa Election Planning and Agree
1/1/03	0.00	\$0.00	\$0.00	\$0.00	Determination of Bargainin; Bargaining Unit Lists
	0.00	\$0.00	\$0.00	\$0.00	

Nunnally, Delecia - Assoc. Dean, Student Srvcs Salaried Employee	\$63.60
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	19.20	\$1,221.12	\$0.00	\$0.00	Contract Administration
	Time spent in Dean's Council committee meetings.				
	19.20	\$1,221.12	\$0.00	\$0.00	Contract Administration Com

Paulson, Jan - Manager Systems / Programs Salaried Employee	\$64.05
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	1.20	\$76.86	\$0.00	\$0.00	Contract Administration
	Time spent in Dean's Council committee meetings.				
	1.20	\$76.86	\$0.00	\$0.00	Contract Administration Com

**Sierra Joint Community College District  
Collective Bargaining  
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Poland, Becky - Admin Asst. Salaried Employee	\$32.28
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
12/4/02	0.50	\$16.14	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
1/7/03	0.50	\$16.14	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
	<u>1.00</u>	<u>\$32.28</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Reader, Vicki - Business Services Supervisor Salaried Employee	\$68.11
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
11/1/02	0.80	\$54.49	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
11/4/02	1.00	\$68.11	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
1/1/03	2.50	\$170.28	\$0.00	\$0.00 Contract Administration	Contract Administration Com
					Time spent in Dean's Council committee meetings.
1/7/03	1.50	\$102.17	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
3/4/03	1.00	\$68.11	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
4/3/03	1.00	\$68.11	\$0.00	\$0.00 Contract Administration	Grievances
					Time spent working on grievances
4/22/03	2.00	\$136.22	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
					Time spent preparing for negotiations with classified staff
	<u>9.80</u>	<u>\$667.48</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Rehwald, Wende - Health Nurse Practitioner Salaried Employee	\$127.49
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
8/14/02	2.00	\$254.98	\$0.00	\$0.00 Contract Administration	Contract Administration
					Time spent working on contract administration issues
11/20/02	1.00	\$127.49	\$0.00	\$0.00 Contract Administration	Contract Administration
					Time spent working on contract administration issues
	<u>3.00</u>	<u>\$382.47</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Roberts, Millie - Executive Secretary Salaried Employee	\$50.40
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
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**Sierra Joint Community College District  
Collective Bargaining  
by Name**

1/1/03	0.20	\$10.08	\$0.00	\$0.00	Contract Administration	Contract Interpretation
	Time spent with attorneys from Johnson, Schachter, and Collins in contract interpretations.					
1/1/03	1.60	\$80.64	\$0.00	\$0.00	Contract Administration	Contract Administration Com
	<u>Time spent in Dean's Council committee meetings.</u>					
	<u>1.80</u>	<u>\$90.72</u>	<u>\$0.00</u>	<u>\$0.00</u>		

Schneider, Greg - Purchasing Supervisor Salaried Employee	\$39.12
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	1.60	\$62.59	\$0.00	\$0.00	Contract Administration
	Time spent in Dean's Council committee meetings.				
1/1/03	0.80	\$31.30	\$0.00	\$0.00	Contract Administration
	<u>Time spent in Dean's Council committee meetings working on contract administration issues.</u>				
	<u>2.40</u>	<u>\$93.89</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Schwenk, Lonnie - Chief of Police Services Salaried Employee	\$48.85
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	0.80	\$39.08	\$0.00	\$0.00	Contract Administration
	<u>Time spent in Dean's Council committee meetings.</u>				
	<u>0.80</u>	<u>\$39.08</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Scott, Sandra - Director, Economic Dev. Salaried Employee	\$74.75
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	14.20	\$1,061.45	\$0.00	\$0.00	Contract Administration
	Time spent in Dean's Council committee meetings.				
5/28/03	1.00	\$74.75	\$0.00	\$0.00	Contract Administration
	<u>Time spent in contract interpretations</u>				
	<u>15.20</u>	<u>\$1,136.20</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Smalley, Craig - Data Admin Salaried Employee	\$64.93
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	0.50	\$32.47	\$0.00	\$0.00	Contract Administration
	<u>Time spent in Dean's Council committee meetings.</u>				
	<u>0.50</u>	<u>\$32.47</u>	<u>\$0.00</u>	<u>\$0.00</u>	

**Sierra Joint Community College District**  
**Collective Bargaining**  
**by Name**

Smith, Doug - V.P., Finance Admin.  
 Salaried Employee

\$85.93

<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted</u>	<u>Component</u>	<u>Activity</u>
8/27/02	0.80	\$68.74	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
						Time spent preparing for negotiations with classified staff
8/30/02	1.50	\$128.90	\$0.00	\$0.00	Contract Administration	Contract Administration
						Time spent working on contract administration issues
9/12/02	2.00	\$171.86	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
						Time spent preparing for negotiations with certificated staff
9/16/02	1.30	\$111.71	\$0.00	\$0.00	Contract Administration	Contract Administration Comu
						Time spent in Joint Labor Management Committee meeting.
9/19/02	1.70	\$146.08	\$0.00	\$0.00	Contract Administration	Contract Administration Comu
						Time spent in Joint Labor Management Committee meeting.
9/26/02	0.50	\$42.97	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
						Time spent preparing for negotiation with certificated staff
10/3/02	0.50	\$42.97	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
						Time spent preparing for negotiations with certificated staff
10/10/02	3.00	\$257.79	\$0.00	\$0.00	Contract Administration	Contract Administration Comu
						Time spent working on Part-Time Faculty Workgroup Recollections
10/24/02	0.50	\$42.97	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
						Time spent preparing for negotiations with certificated staff
10/30/02	1.00	\$85.93	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
						Time spent preparing for negotiations with certificated staff
10/31/02	0.50	\$42.97	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
						Time spent preparing for negotiations with certificated staff
11/2/02	1.00	\$85.93	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
						Time spent preparing for negotiations with classified staff
11/25/02	0.50	\$42.97	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
						Time spent preparing for negotiations with certificated staff
12/2/02	0.50	\$42.97	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
						Time spent preparing for negotiations with certificated staff
12/5/02	1.30	\$111.71	\$0.00	\$0.00	Contract Administration	Contract Administration Comu
						Time spent in Joint Labor Management Committee meeting.
12/9/02	0.50	\$42.97	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
						Time spent preparing for negotiations with certificated staff
12/18/02	0.50	\$42.97	\$0.00	\$0.00	Contract Administration	Contract Interpretation
						Time spent in contract interpretations
1/1/03	2.00	\$171.86	\$0.00	\$0.00	Contract Administration	Contract Administration
						Time spent working on contract administration issues
1/1/03	6.90	\$592.92	\$0.00	\$0.00	Contract Administration	Contract Administration Comu
						Time spent in Dean's Council committee meetings.
1/1/03	37.00	\$3,179.41	\$0.00	\$0.00	Cost of Negotiations	Negotiating Certificated
						Time spent in At-Table Negotiations with certificated staff.
<del>1/1/03</del>	<del>20.50</del>	<del>\$1,761.57</del>	<del>\$0.00</del>	<del>\$0.00</del>	<del>Cost of Negotiations</del>	<del>Negotiations Preparation</del>
						Time spent preparing for negotiations with classified staff
1/1/03	2.90	\$249.20	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
						Time spent preparing for negotiations with certificated staff
1/1/03	2.00	\$171.86	\$0.00	\$0.00	Cost of Negotiations	Negotiating Certificated
						Time spent in At-Table Negotiations with certificated staff.

**Sierra Joint Community College District**  
**Collective Bargaining**  
**by Name**

1/1/03	23.20	\$1,993.58	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
1/1/03	96.50	\$8,292.25	\$0.00	\$0.00	Cost of Negotiations	Negotiating Classified
	Time spent in At-Table Negotiations with classified staff.					
1/1/03	3.40	\$292.16	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
1/1/03	18.70	\$1,606.89	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
1/1/03	14.80	\$1,271.76	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
1/9/03	0.50	\$42.97	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
1/9/03	0.50	\$42.97	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
1/10/03	0.50	\$42.97	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
1/10/03	1.50	\$128.90	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
1/10/03	2.00	\$171.86	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
1/23/03	1.30	\$111.71	\$0.00	\$0.00	Contract Administration	Contract Administration Comu
	Time spent in Joint Labor Management Committee meeting.					
2/5/03	1.00	\$85.93	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
2/5/03	1.00	\$85.93	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
2/10/03	0.50	\$42.97	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
2/24/03	1.00	\$85.93	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
2/24/03	1.00	\$85.93	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
2/27/03	3.00	\$257.79	\$0.00	\$0.00	Contract Administration	Contract Administration Comu
	Time spent in Joint Labor Management Committee meeting.					
3/6/03	0.50	\$42.97	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
3/6/03	0.50	\$42.97	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
3/7/03	1.00	\$85.93	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
3/11/03	2.00	\$171.86	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff					
3/13/03	3.50	\$300.76	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
3/20/03	1.00	\$85.93	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
3/20/03	1.00	\$85.93	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff					
3/27/03	4.00	\$343.72	\$0.00	\$0.00	Contract Administration	Contract Administration Comu
	Time spent in Joint Labor Management Committee meeting.					
8/03	0.50	\$42.97	\$0.00	\$0.00	Cost of Negotiations	Negotiations Preparation

**Sierra Joint Community College District  
Collective Bargaining  
by Name**

	Time spent preparing for negotiations with certificated staff				
5/15/03	0.50	\$42.97	\$0.00	\$0.00	Cost of Negotiations
					Negotiations Preparation
	Time spent preparing for negotiations with certificated staff				
5/20/03	2.00	\$171.86	\$0.00	\$0.00	Contract Administration
					Contract Administration Com
	Time spent in Joint Labor Management Committee meeting.				
11/21/03	0.50	\$42.97	\$0.00	\$0.00	Cost of Negotiations
					Negotiations Preparation
	<u>Time spent preparing for negotiations with certificated staff</u>				
	<u>276.30</u>	<u>\$23,742.46</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Snyder, Scott - Tech Support Manager Salaried Employee	\$53.66
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	0.80	\$42.93	\$0.00	\$0.00	Contract Administration
					Contract Administration Com
	<u>Time spent in Dean's Council committee meetings.</u>				
	<u>0.80</u>	<u>\$42.93</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Sumner, Joann - Assoc., Dean Curric. Salaried Employee	\$86.31
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
10/21/02	1.50	\$129.47	\$0.00	\$0.00	Cost of Negotiations
					Negotiations Preparation
	Time spent preparing for negotiations with certificated staff				
1/1/03	19.10	\$1,648.52	\$0.00	\$0.00	Contract Administration
					Contract Administration Com
	<u>Time spent in Dean's Council committee meetings.</u>				
	<u>20.60</u>	<u>\$1,777.99</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Thiers, Laurie - Program Manager, EP&S Interim Salaried Employee	\$41.71
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	20.40	\$850.88	\$0.00	\$0.00	Contract Administration
					Contract Administration Com
	<u>Time spent in Dean's Council committee meetings.</u>				
	<u>20.40</u>	<u>\$850.88</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Tsuji, Bill - Dean, Liberal Arts Salaried Employee	\$86.65
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
10/10/02	3.00	\$259.95	\$0.00	\$0.00	Contract Administration
					Contract Administration Com
	Time spent working on Part-Time Faculty Workgroup Recollections				
1/1/03	20.20	\$1,750.33	\$0.00	\$0.00	Contract Administration
					Contract Administration Com
	Time spent in Dean's Council committee meetings.				

**Sierra Joint Community College District  
Collective Bargaining  
by Name**

23.20    \$2,010.28    \$0.00    \$0.00

Velazquez, Nilo - Bookstore Manager Salaried Employee	\$65.10
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	0.30	\$19.53	\$0.00	\$0.00 Contract Administration	Contract Administration Com
	<u>Time spent in Dean's Council committee meetings.</u>				
	0.30	\$19.53	\$0.00	\$0.00	

Volek, John - Dean - PE Athletics Salaried Employee	\$74.75
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	2.60	\$194.35	\$0.00	\$0.00 Contract Administration	Contract Administration Com
	<u>Time spent in Dean's Council committee meetings.</u>				
	2.60	\$194.35	\$0.00	\$0.00	

Walters-Dunlap, Karen - Dean, Science & Math Salaried Employee	\$78.11
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
7/18/02	1.00	\$78.11	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff				
10/10/02	3.00	\$234.33	\$0.00	\$0.00 Contract Administration	Contract Administration Com
	Time spent working on Part-Time Faculty Workgroup Recollections				
1/1/03	20.80	\$1,624.69	\$0.00	\$0.00 Contract Administration	Contract Administration Com
	Time spent in Dean's Council committee meetings.				
2/19/03	1.00	\$78.11	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff				
3/6/03	1.00	\$78.11	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
	<u>Time spent preparing for negotiations with certificated staff</u>				
	26.80	\$2,093.35	\$0.00	\$0.00	

Wharff, Beverly - Personnel Coordinator, HR Salaried Employee	\$54.89
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	5.00	\$274.45	\$0.00	\$0.00 Contract Administration	Contract Administration
	<u>Time spent working on contract administration issues</u>				
	5.00	\$274.45	\$0.00	\$0.00	

**Sierra Joint Community College District  
Collective Bargaining  
by Name**

White, Margeret - Associate Director, Nursing Salaried Employee	\$75.87
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	12.00	\$910.44	\$0.00	\$0.00 Contract Administration	Contract Administration Com
	Time spent in Dean's Council committee meetings.				
	<u>12.00</u>	<u>\$910.44</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Wickstrom, Robert - Director, Business Services Salaried Employee	\$88.79
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
7/16/02	1.00	\$88.79	\$0.00	\$0.00 Contract Administration	Contract Interpretation
	Time spent in contract interpretations				
10/23/02	1.40	\$124.31	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff				
10/23/02	1.40	\$124.31	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff				
11/4/02	1.00	\$88.79	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff				
1/1/03	3.80	\$337.40	\$0.00	\$0.00 Contract Administration	Contract Administration Com
	Time spent in Dean's Council committee meetings.				
3/27/03	0.90	\$79.91	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff				
3/27/03	0.90	\$79.91	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff				
	<u>10.40</u>	<u>\$923.42</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Wilson, Woodrow - Director Planning & Research Salaried Employee	\$78.11
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	2.10	\$164.03	\$0.00	\$0.00 Contract Administration	Contract Administration Com
	Time spent in Dean's Council committee meetings.				
	<u>2.10</u>	<u>\$164.03</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Wollesen, Mary - Program Manager, SBDC & Ec Dev Salaried Employee	\$59.08
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<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	1.10	\$64.99	\$0.00	\$0.00 Contract Administration	Contract Administration Com
	Time spent in Dean's Council committee meetings.				
	<u>1.10</u>	<u>\$64.99</u>	<u>\$0.00</u>	<u>\$0.00</u>	



Sierra Joint Community College District  
Collective Bargaining  
by Name

Yorde, Phil - Technical Support Srvcs Mgr  
Salaried Employee \$52.99

<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	0.80	\$42.39	\$0.00	\$0.00	Contract Administration
	<u>Time spent in Dean's Council committee meetings.</u>				
	0.80	\$42.39	\$0.00	\$0.00	Contract Administration Com

# JOHNSON SCHACHTER & COLLINS

A PROFESSIONAL CORPORATION

CALIFORNIA PLAZA

2180 HARVARD STREET, SUITE 560

SACRAMENTO, CALIFORNIA 95815

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KELLIE M. MURPHY  
ALVIN GITTISRIBOONGUL  
DAVID S. WOMACK  
MARGARET W. HOSEL  
FORD R. SMITH \*\*  
SUSANNE M. SHELLEY \*\*\*

March 4, 2003

\* A PROFESSIONAL CORPORATION  
\*\* OF COUNSEL  
\*\*\* EMERITUS  
† ALSO ADMITTED IN NEW YORK  
†† ALSO ADMITTED IN OREGON

Robert Wickstrom  
Chief Business Officer  
Sierra Community College District  
5000 Rocklin Road  
Rocklin, CA 95677

Re: Sierra Collège Faculty Retirees' Arbitration

Dear Mr. Wickstrom:

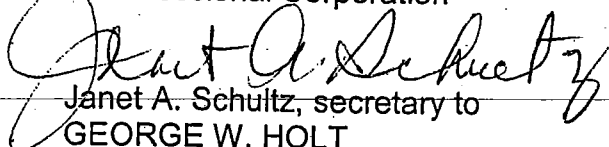
Enclosed are the following vendor bill(s) which have been reviewed and found appropriate for payment. Please remit directly to the vendor. Thank you.

Vendor	Invoice	Amount Due	Description
Catherine Harris, Esq.	2/28/2003	\$1,900.00	Cancellation Fees

Yours very truly,

JOHNSON SCHACHTER & COLLINS

A Professional Corporation



Janet A. Schultz, secretary to

GEORGE W. HOLT

[jan@jsc-attorneys.com](mailto:jan@jsc-attorneys.com)

js  
Enclosure(s)

2010-11-20



**NICOLAY CONSULTING GROUP**  
Pension Consultants & Actuaries  
333 Hegenberger Road, Suite 800  
Oakland, California 94621  
Tel (510) 567-0610 ♦ Fax (510) 567-0629

**TO: Mr. Douglas R. Smith**  
Vice President, Finance and Administration  
Sierra Community College District  
500 Rocklin Road  
Rocklin, California 95677

**Date: December 26, 2002**

**Invoice No.: 343-2002-11**

Job Descriptions	Fees and Expenses
<p>Billing for actuarial and consulting services rendered from October, 2002 through December, 2002 in connection with the postretirement healthcare program sponsored by Sierra College.</p> <p>These services included the following:</p> <ol style="list-style-type: none"> <li>1. Preparation for and attendance by Dennis Daugherty at an October 23, 2002 meeting to discuss the current plan and proposed changes that would extend benefits to employees hired after July 1, 1994.</li> <li>2. Review the work completed by the postretirement task force.</li> <li>3. The preparation of multi-year Fund Balance projections for the current program under a variety of withdrawal assumptions.</li> <li>4. The preparation of multi-year Fund Balance projections for employees hired since July 1, 1994.</li> <li>5. Preparation for and attendance by Dennis Daugherty at a December 5, 2002 meeting with the Joint Labor Management Team to discuss the projections.</li> <li>6. The preparation of final letters, dated December 19, 2002.</li> <li>7. Several telephone conversations with District personnel to discuss assumptions and the projections.</li> </ol>	
<p style="text-align: right;"><b>Total amount due</b></p>	<p style="text-align: center;"><b>\$7,900.00</b></p>
<p><i>Please return the consultant's copy with your remittance at the above address.</i></p>	

SIX TEN & ASSOC.  
JAN 2 2003

Sierra Community College District  
Collective Bargaining  
FY 2002-2003  
Jacobson, Betts and Company Management Consultants

Billing Date	Service Date	Component 3	
		Contract Negotiation	Total Expenses (for Billing Dates)
		NP	
7/31/02	7/11	3.00	\$711.36
	7/18	22.00	
	7/31	2.00	
	7/31	4.00	
9/3/02	8/1	1.00	\$844.31
	8/14	19.00	
	8/15	8.00	
	8/30	3.00	
9/28/02	9/30	7.00	\$669.52
	9/18	22.00	
10/31/02	10/8	3.00	\$1,646.21
	10/9	21.00	
	10/14	9.50	
	10/28	3.50	
	10/31	22.00	
11/29/02	11/3	2.50	\$617.99
	11/17	4.00	
	11/21	14.50	
	11/29	14.00	
12/13/02	12/4	4.00	\$584.17
	12/10	6.00	
	12/12	11.00	
	12/11	3.00	
	12/31	4.00	
2/3/03	1/3	4.00	\$1,515.76
	1/8	13.50	
	1/25	7.50	
	1/31	26.50	
	1/30	1.50	
2/28/03	2/4	16.00	\$895.90
	2/22	14.00	
	2/25	3.00	
	2/26	22.00	
	2/26	1.00	
3/29/03	3/24	14.00	\$1,697.13
	3/11	4.00	
	3/13	16.00	
	3/21	5.00	
	3/27	21.00	
5/1/03	4/7	3.00	\$954.51
	4/21	7.00	
	4/24	11.00	
	4/23	8.00	
	4/25	12.00	
5/31/03	5/31	11.50	\$1,326.80
	5/15	28.00	
	5/14	2.00	
	5/28	7.00	
	5/30	6.50	
	5/31	3.50	
6/30/03	6/8	5.50	\$786.24
	6/6	2.50	
	6/11	4.00	
	6/12	32.00	
	6/19	3.50	
<b>Totals</b>		<b>529.00</b>	<b>\$12,249.90</b>

Total Consultant hours at \$120 p/h = 529.00

KEY

NP	Negotiation Preparation
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**JACOBSON, BETTS & COMPANY**  
 Management Consultants

Sierra College  
 5000 Rocklin Road  
 Rocklin, California 95677

July 31, 2002

Professional Services in connection with conducting job analysis and compensation consulting from June 26, 2002 through July 31, 2002.

<b>Professional Fees:</b>		
July 11	Classified Job descriptions, IT. 3.00 hours at \$ 120.00	\$ 360.00
July 15-18	Job analysis, Gate, NCC, IT. 22.00 hours at \$ 120.00	\$ 2,640.00
July 31	Classified job descriptions, Admiss. 2.00 hours at \$ 120.00	\$ 240.00
July 25, 31	Job descriptions, Bus., Facil. 4.00 hours at \$ 120.00	\$ 480.00
<b>Expenses:</b>		
	Communications, office	\$ 74.40
	Transportation (1 trip, 3xauto)	\$ 417.60
	Lodging (2 nights)	\$ 177.96
	Meals	\$ 41.40
	Other	\$ -

<b>Total Fees</b>	\$ 3,720.00
<b>Total Expenses</b>	\$ 711.36
<b>Total Due</b>	\$ 4,431.36

Outstanding Balances				
Current	31-60 days	61-90 days	Over 90	
\$ 4,431.36	\$ -	\$ -	\$ -	
<b>Grand Total Due</b>				\$ 4,431.36

Thank you. Terms are net end-of-month.

*[Handwritten Signature]*  
 OK to pay

**JACOBSON, BETTS & COMPANY**  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

September 3, 2002

Professional Services in connection with conducting job analysis and compensation consulting from August 1, 2002 through August 31, 2002.

**Professional Fees:**

Aug 1	Classified job descriptions, IT.		
	1.00 hours at	\$ 120.00	\$ 120.00
Aug 13-14 and 19	Job descriptions, job analysis, org. review.		
	19.00 hours at	\$ 120.00	\$ 2,280.00
Aug 14, 15	Labor relations.		
	8.00 hours at	\$ 120.00	\$ 960.00
Aug 20, 30	Job descriptions, Labs, Graphics		
	3.00 hours at	\$ 120.00	\$ 360.00

**Expenses:**

Communications, office	\$ 74.40
Transportation (1 trip, 1 trip shared, 4xauto)	\$ 546.60
Lodging (2 nights)	\$ 177.96
Meals	\$ 45.35
Other	\$ -

<b>Total Fees</b>	\$ 3,720.00
<b>Total Expenses</b>	\$ 844.31
<b>Total Due</b>	\$ 4,564.31

Outstanding Balances			
<u>Current</u>	<u>31-60 days</u>	<u>61-90 days</u>	<u>Over 90</u>
\$ 4,564.31	\$ 4,431.36	\$ -	\$ -
<b>Grand Total Due</b>			<b>\$ 8,995.67</b>

Thank you. Terms are net end-of-month.

P.O. # 31092

*Don J*  
OK to pay

JACOBSON, BETTS & COMPANY  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

September 28, 2002

Professional Services in connection with conducting job analysis and compensation consulting from September 1, 2002 through September 30, 2002.

**Professional Fees:**

Sep misc.	Classified job descriptions for marketing, facilities.	
	(7.00) hours at \$ 120.00	\$ 840.00
Sep 16-18	Classified work sessions, job reviews.	
	(22.00) hours at \$ 120.00	\$ 2,640.00
		\$ -
		\$ -

**Expenses:**

Communications, office	\$ 69.60
Transportation (1 trip, 3xauto)	\$ 362.46
Lodging (2 nights)	\$ 191.40
Meals	\$ 46.06
Other	\$ -

<b>Total Fees</b>	\$ 3,480.00
<b>Total Expenses</b>	\$ (669.52)
<b>Total Due</b>	\$ 4,149.52

Outstanding Balances			
Current	31-60 days	61-90 days	Over 90
\$ 4,149.52	\$ -	\$ -	\$ -
<b>Grand Total Due</b>			<b>\$ 4,149.52</b>

Thank you. Terms are net end-of-month.

P.O. #031092

*[Signature]*  
OK to pay

**JACOBSON, BETTS & COMPANY**

Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

October 31, 2002

Professional Services in connection with conducting job analysis and compensation consulting from October 1, 2002 through October 31, 2002.

**Professional Fees:**

Oct 8	Joint labor mgt conferences.		
	3.00 hours at \$ 120.00	\$	360.00
Oct 7-9	Classified work sessions, job reviews.		
	21.00 hours at \$ 120.00	\$	2,520.00
Oct 14ff.	Reorg. Job descriptions (HR, facil., reorg.)		
	9.50 hours at \$ 120.00	\$	1,140.00
Oct 28	Committee training.		
	3.50 hours at \$ 120.00	\$	420.00
Oct 29-31	Classified work sessions, job reviews.		
	22.00 hours at \$ 120.00	\$	2,640.00

**Expenses:**

Communications, office	\$	70.80
Transportation (2 trips, 7xauto)	\$	956.20
Lodging (5 nights)	\$	515.93
Meals	\$	103.28
Other	\$	-

<b>Total Fees</b>	\$	7,080.00
<b>Total Expenses</b>	\$	1,646.21
<b>Total Due</b>	\$	8,726.21

Outstanding Balances				
Current	31-60 days	61-90 days	Over 90	
\$ 8,726.21	\$ -	\$ -	\$ -	
<b>Grand Total Due</b>				\$ 8,726.21

Thank you. Terms are net end-of-month.

P.O. 031092

*[Handwritten Signature]*  
OK to pay



**JACOBSON, BETTS & COMPANY**  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

November 29, 2002

Professional Services in connection with conducting job analysis and compensation consulting from November 1, 2002 through November 30, 2002.

**Professional Fees:**

Nov 3	Job descriptions - reorg.	2.50 hours at \$ 120.00	\$ 300.00
Nov 14, 17	Job descriptions - reorg.	4.00 hours at \$ 120.00	\$ 480.00
Nov 19-21	Job analysis, Feedback.	14.50 hours at \$ 120.00	\$ 1,740.00
Nov 26-29	IT job descriptions.	14.00 hours at \$ 120.00	\$ 1,680.00

**Expenses:**

Communications, office	\$ 42.00
Transportation (1 trip, 2xauto)	\$ 339.12
Lodging (2 nights)	\$ 137.08
Meals	\$ 99.79
Other	\$ -

<b>Total Fees</b>	\$ 4,200.00
<b>Total Expenses</b>	\$ 617.99
<b>Total Due</b>	\$ 4,817.99

Outstanding Balances				
<u>Current</u>	<u>31-60 days</u>	<u>61-90 days</u>	<u>Over 90</u>	
\$ 4,817.99	\$ -	\$ -	\$ -	
<b>Grand Total Due</b>				\$ 4,817.99

Thank you. Terms are net end-of-month.

*Handwritten signature*  
OK to pay

P.O. 031092

**JACOBSON, BETTS & COMPANY**  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

December 13, 2002

Professional Services in connection with conducting job analysis and compensation consulting from December 1, 2002 through December 31, 2002.

**Professional Fees:**

Dec 4	Conference, job analysis. (4.00) hours at \$ 120.00	\$ 480.00
Dec 10	Strat council and related conf. (6.00) hours at \$ 120.00	\$ 720.00
Dec 10-12	Classified IT Job descriptions and feedback. (11.00) hours at \$ 120.00	\$ 1,320.00
Dec 11	Classified job analysis/descr for Truckee. (3.00) hours at \$ 120.00	\$ 360.00
Dec misc.	Classified job descriptions. (4.00) hours at \$ 120.00	\$ 480.00

**Expenses:**

Communications, office	\$ -
Transportation (1 trip, 4xauto, airfare already paid)	\$ 213.43
Lodging (3 nights)	\$ 313.99
Meals	\$ 56.75
Other	\$ -

<b>Total Fees</b>	\$ 3,360.00
<b>Total Expenses</b>	\$ 584.17
<b>Total Due</b>	\$ 3,944.17

Outstanding Balances				
Current	31-60 days	61-90 days	Over 90	
\$ 3,944.17	\$ -	\$ -	\$ -	\$ 3,944.17
<b>Grand Total Due</b>				<b>\$ 3,944.17</b>

Thank you. Terms are net end-of-month.

P.O. #031092

*Handwritten signature*  
OK to pay

JACOBSON, BETTS & COMPANY  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

February 3, 2003

Professional Services in connection with conducting classified job analysis and compensation consulting from January 1, 2003 through January 31, 2003.

**Professional Fees:**

Jan 3	Classified job descriptions. 4.00 hours at \$ 120.00	\$ 480.00
Jan 7, 8	Classified job analysis-FUSE conversation. 13.50 hours at \$ 120.00	\$ 1,620.00
Jan 22-25	Classified IT Job descriptions and feedback. 7.50 hours at \$ 120.00	\$ 900.00
Jan 28-31	Classified job analysis-FUSE conversation. 26.50 hours at \$ 120.00	\$ 3,180.00
Jan 30	Classified job analysis-reorganization. 1.50 hours at \$ 120.00	\$ 180.00

**Expenses:**

Communications, office	\$ -
Transportation (2 trip, 6xauto)	\$ 802.66
Lodging (6 nights)	\$ 642.65
Meals	\$ 70.45
Other	\$ -

<b>Total Fees</b>	\$ 6,360.00	line 1
<b>Total Expenses</b>	\$ 1,515.76	line 2
<b>Total Due</b>	\$ 7,875.76	

Outstanding Balances				
Current	31-60 days	61-90 days	Over 90	
\$ 7,875.76	\$ -	\$ -	\$ -	
<b>Grand Total Due</b>				\$ 7,875.76

Thank you. Terms are net end-of-month.

*dc to pay [Signature]*  
P.O. #031092

JACOBSON, BETTS & COMPANY  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

February 28, 2003

Professional Services in connection with conducting classified job analysis and compensation consulting from February 1, 2003 through February 28, 2003.

**Professional Fees:**

Feb 3-4	Classified conversion, job analysis, Trades.		
	16.00 hours at \$ 120.00	\$	1,920.00
Feb 1/18 & 22	Classified job analysis-FUSE conversation.		
	14.00 hours at \$ 120.00	\$	1,680.00
Feb 24/25	Classified conversion training, evals.		
	3.00 hours at \$ 120.00	\$	360.00
Feb 25/26	Classified job conversion and job tracks.		
	22.00 hours at \$ 120.00	\$	2,640.00
Feb 26	Classified job analysis-reorganization.		
	1.00 hours at \$ 120.00	\$	120.00

**Expenses:**

Communications, office	\$	-
Transportation (2 trip, 4xauto)	\$	588.60
Lodging (3 nights)	\$	282.80
Meals	\$	24.50
Other	\$	-

**Total Fees** \$ 6,720.00

**Total Expenses** \$ 895.90

**Total Due** \$ 7,615.90

**Outstanding Balances**

<u>Current</u>	<u>31-60 days</u>	<u>61-90 days</u>	<u>Over 90</u>
\$ 7,615.90	\$ -	\$ -	\$ -
<b>Grand Total Due</b>			<b>\$ 7,615.90</b>

Thank you. Terms are net end-of-month.

*ok to pay  
JBL  
3/12/03*

*P.O. # 031092*

**JACOBSON, BETTS & COMPANY**  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

March 29, 2003

Professional Services in connection with conducting classified job analysis and compensation consulting from March 1, 2003 through March 31, 2003.

**Professional Fees:**

Mar 10, 24	Classified labor negotiations.			
	14.00 hours at	\$	120.00	\$ 1,680.00
Mar 11	Classified job conversion and job tracks.			
	4.00 hours at	\$	120.00	\$ 480.00
Mar 11-13	Classified job analysis, conversion.			
	16.00 hours at	\$	120.00	\$ 1,920.00
Mar 19, 21	Classified job descriptions for Trades, IT.			
	5.00 hours at	\$	120.00	\$ 600.00
Mar 25-27	Classified job analysis and descr. Reorg.			
	21.00 hours at	\$	120.00	\$ 2,520.00
Mar 28	Salplan model.			
	3.00 hours at	No charge		\$ -

**Expenses:**

Communications, office	\$ -
Transportation (2 trip, 8xauto)	\$ 917.02
Lodging (7 nights)	\$ 678.13
Meals	\$ 101.98
Other	\$ -

<b>Total Fees</b>	\$ 7,200.00
<b>Total Expenses</b>	\$ 1,697.13
<b>Total Due</b>	\$ 8,897.13

Outstanding Balances				
Current	31-60 days	61-90 days	Over 90	
\$ 8,897.13	\$ -	\$ -	\$ -	\$ 8,897.13
<b>Grand Total Due</b>				\$ 8,897.13

Thank you. Terms are net end-of-month.

4/2/03  
OK to pay  
Bill Land

P.O. 31092

OK to pay

JACOBSON, BETTS & COMPANY  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

May 1, 2003

Professional Services in connection with conducting classified job analysis and compensation consulting from April 1, 2003 through April 30, 2003.

**Professional Fees:**

Apr 1, 7	Job descriptions.				
	(3.00) hours at	\$	120.00	\$	360.00
Apr 16, 21	Job descriptions.			\$	840.00
	(7.00) hours at	\$	120.00		
Apr 22, 24	Classified negotiations and concept discussions.			\$	1,320.00
	(11.00) hours at	\$	120.00		
Apr 23	Classified job analysis.			\$	960.00
	(8.00) hours at	\$	120.00		
Apr 24, 25	Classified job analysis and descr. Reorg.			\$	1,440.00
	(12.00) hours at	\$	120.00		

**Expenses:**

Communications, office	\$	-
Transportation (1 trip, 5xauto)	\$	476.61
Lodging (4 nights)	\$	389.60
Meals	\$	88.30
Other	\$	-

**Total Fees**  
**Total Expenses**

\$ 4,920.00  
\$ (954.51)

*line 1*  
*line 2*

**Total Due**

\$ 5,874.51

**Outstanding Balances**

<u>Current</u>	<u>31-60 days</u>	<u>61-90 days</u>	<u>Over 90</u>
\$ 5,874.51	\$ -	\$ -	\$ -

**Grand Total Due**

\$ 5,874.51

Thank you. Terms are net end-of-month.

*OK to pay*  
*5/13/03*  
*PD. 031092*

JACOBSON, BETTS & COMPANY  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

May 31, 2003

Professional Services in connection with conducting classified job analysis and compensation consulting from May 1, 2003 through May 31, 2003.

Professional Fees:

• May misc.	Trades job descriptions.			
	11.50 hours at	\$	120.00	\$ 1,380.00
✓ May 12-15	Classified conversion feedback and job analysis.			
	28.00 hours at	\$	120.00	\$ 3,360.00
✓ May 14	Finance & Admin discussions.			
	2.00 hours at	\$	120.00	\$ 240.00
✓ May 27, 28	Re-org descriptions.			
	7.00 hours at	\$	120.00	\$ 840.00
✓ May 28, 30	Finance & Admin conf & descriptions.			
	6.50 hours at	\$	120.00	\$ 780.00
• May 31	HR + Truckee job descriptions.			
	3.50 hours at	\$	120.00	\$ 420.00

Expenses:

Communications, office	\$	-
Transportation (2 trips, 7xauto)	\$	792.03
Lodging (5 nights)	\$	505.21
Meals	\$	29.56
Other	\$	-

Total Fees	\$	7,020.00
Total Expenses	\$	1,326.80
<b>Total Due</b>	\$	<b>8,346.80</b>

Outstanding Balances				
Current	31-60 days	61-90 days	Over 90	
\$ 8,346.80	\$ -	\$ -	\$ -	
<b>Grand Total Due</b>				\$ 8,346.80

Thank you. Terms are net end-of-month.

*OK to pay*  
*6/4/03*  
*Wentland*  
*Done*  
*OK to pay*

*P.O. 03/092*



**JACOBSON, BETTS & COMPANY**  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

June 30, 2003

Professional Services in connection with conducting classified job analysis and compensation consulting from June 1, 2003 through June 30, 2003.

**Professional Fees:**

Jun 1, 8	Classified job descriptions. (5.50) hours at \$ 120.00	\$ 660.00
Jun 5, 6	Finance & Admin discussions. (2.50) hours at \$ 120.00	\$ 300.00
Jun 9, 11	Re-org analysis and descriptions. (4.00) hours at \$ 120.00	\$ 480.00
Jun 9-12	Classified conversion feedback and job analysis. (32.00) hours at \$ 120.00	\$ 3,840.00
Jun 16-19	Job descriptions for HRD, (3.50) hours at \$ 120.00	\$ 420.00

**Expenses:**

Communications, office	\$ -
Transportation (1 trip, 4xauto)	\$ 502.77
Lodging (4 nights, 2 free)	\$ 228.02
Meals	\$ 55.45
Other	\$ -

Total Fees	\$ 5,700.00
Total Expenses	\$ (786.24)
<b>Total Due</b>	<b>\$ 6,486.24</b>

Outstanding Balances				
Current	31-60 days	61-90 days	Over 90	
\$ 6,486.24	\$ -	\$ -	\$ -	
<b>Grand Total Due</b>				<b>\$ 6,486.24</b>

Thank you. Terms are net end-of-month.

*OK to pay  
7/3/03*

*P.O. 31092* *OK to pay*

600 First Avenue, Suite 426, Seattle, Washington 98104  
Voice: 206-624-4944 FAX: 206-624-4954



Sierra Community College District  
Collective Bargaining  
FY 2002-2003

Summary of Reimbursable Legal Services  
Johnson, Schachter and Collins Attorneys

Billing Date	Service Date	Employee Contact	Employee Time	Component 3			Component 6			Component 7	
				Contract NP	Contract Negotiation NC	Contract Administration AGT	Contract Administration AI	PERB UP			
8/22/02	7/18	Davies, Mandy	0.30	0.50							
9/25/02	8/15			0.50							
	8/21				0.60						
	8/28			2.20							
10/21/02	9/23									0.20	
11/23/02	10/31									28.70	
	10/31	Martinez, Ron	0.20							1.90	
12/2/02	10/9					3.90					
	10/10						0.10				
	10/10						0.10				
	10/2						0.40				
	10/2						1.50				
	10/14						0.10				
12/26/02	11/12				0.10						
	11/13				0.10						
2/28/03	12/31									0.90	
	1/31									60.70	
	1/2									5.85	
	1/8						6.50				
	1/13						0.85				
	1/23						0.10				
	1/23						0.10				
	1/22								1.10		
	1/22	Martinez, Ron	0.10						0.10		
	1/22	Leland, Jeanne	0.10						0.10		
3/31/03	2/3				7.75						
	2/6			4.35							
	2/7			1.20							
	2/7			0.10							
	2/7				3.50						
	2/7			0.10							
	2/8			0.10							
	2/11				7.30						

Sierra Community College District  
Collective Bargaining  
FY 2002-2003  
Summary of Reimbursable Legal Services  
Johnson, Schachter and Collins Attorneys

Billing Date	Service Date	Employee Contact	Employee Time	Component 3			Component 6		Component 7	
				Contract NP	Contract Negotiation NC	Contract Administration AGT	AI	PERB UP		
	2/11				0.25					
	2/11				7.30					
	2/12			0.30						
	2/12				0.10					
	2/12				0.10					
	2/13				0.40					
	2/14				6.35					
	2/19			1.00						
	2/19			0.75						
	2/19			0.10						
	2/19			0.10						
	2/19				0.10					
	2/19				0.10					
	2/21				0.10					
	2/25			0.50						
5/8/03	3/31	Martinez, Ron	5.10							40.15
5/9/03	3/20							0.20		
	3/24	Epting-Davis, Carla	0.20	0.20						
	3/25	Leland, Jeanne	0.20					0.20		
								2.30		
	3/27			3.30						
				3.00						
				0.20						
				0.20						
				0.20						
				0.20						
	3/31				0.20					
					0.20					
					0.20					
					0.20					
5/12/03	3/31									1.20
6/4/03	4/30	Martinez, Ron	0.10		7.70					
6/17/03	5/23				0.30					

Sierra Community College District  
 Collective Bargaining  
 FY 2002-2003  
 Summary of Reimbursable Legal Services  
 Johnson, Schachter and Collins Attorneys

Billing Date	Service Date	Employee Contact	Employee Time	Component 3			Component 6			Component 7	
				NP	NC	AGT	AGT	AI	PERB	UP	
7/31/03	6/30				9.60						
8/8/03	4/24	Roberts, Millie	0.20					0.20			
								4.10			
								1.10			
	4/24							0.20			
	4/25							1.20			
								0.20			
9/8/03	7/1	Martinez, Ron	0.20								
	7/7	Martinez, Ron	0.30								
	7/15							2.50			
<b>Total Attorney Hours</b>					<b>19.10</b>	<b>60.10</b>	<b>3.90</b>	<b>13.20</b>			<b>139.60</b>
<b>Total Staff Hours</b>				<b>7.00</b>							

Total Attorney hours at \$135 p/h = 238.90

NP	Negotiation Preparation	AGT	Tenure-Grievance Arbitration
NC	Committee Negotiations	AI	Contract Interpretation
		UP	PERB Preparation

Sierra Community College District  
 FY 2002-2003  
 Summary of District Time w/ Attorneys  
 Johnson, Schachter and Collins Attorneys

Billing Date	Service Date	Employee Contact	Employee Time	Component 3		Component 6		Component 7	
				Contract Negotiation NP	NC	Contract Administration AI		PERB UP	
8/22/02	7/18	Davies, Mandy	0.30	0.30					
11/23/02	10/31	Martinez, Ron	0.20					0.20	
2/28/03	1/22	Martinez, Ron	0.10			0.10			
	1/22	Leland, Jeanne	0.10			0.10			
5/8/03	3/31	Martinez, Ron	5.10					5.10	
	3/24	Epting-Davis, Carla	0.20	0.20					
	3/25	Leland, Jeanne	0.20			0.20			
6/4/03	4/30	Martinez, Ron	0.10		0.10				
8/8/03	4/24	Roberts, Millie	0.20			0.20			
9/8/03	7/1	Martinez, Ron	0.20		0.20				
	7/1	Martinez, Ron	0.30		0.30				
<b>Total Hours</b>			<b>7.00</b>	<b>0.50</b>	<b>0.60</b>	<b>0.60</b>	<b>0.60</b>	<b>5.30</b>	

**Staff Allocation**

Davies, Mandy	0.30	0.30		
Epting-Davis, Carla	0.20	0.20		
Leland, Jeanne	0.30		0.30	
Martinez, Ron	6.00		0.60	5.30
Roberts, Millie	0.20		0.2	

August 22, 2002

PRIVILEGED AND CONFIDENTIAL

Our File Number 01700-44964  
Invoice number 10157

Matter: Sierra Community College District - General

Date	Atty	Services rendered	Hours	Amount
07/11/02	GWH	Telephone call from Ms. Morgan Lynn re: Don Kosper.	0.1	14.50
07/12/02	GWH	Further preparation Airco contract.	1.25	181.25
07/15/02	GWH	Begin analysis of Project Objective and Work Plan from Jacobson et al.	1.2	174.00
07/15/02	GWH	Telephone call to Ms. Maya Joy Sinclair -- spoke re: release.	0.1	14.50
07/18/02	AMS	Lengthy telephone conference with Mandy Davies re: personnel issues; review faxed correspondence and attachments from Mandy Davies; research re: applicable collective bargaining agreement provision; further lengthy telephone conference with Mandy Davies re: recommendations	1.2	174.00
Total for professional services			37.8	\$5,452.00

Summary	Hours	Rate	Amount
Alesa M. Schachter	1.20	145.00	174.00
George W. Holt	36.40	145.00	5,278.00
George W. Holt	0.20	0.00	0.00

	Costs advanced	Amount
07/10/02	Photocopies for this billing period	0.80
07/10/02	Postage for this billing period	1.48
07/26/02	May westlaw charges	61.45

September 25, 2002

PRIVILEGED AND CONFIDENTIAL

Our File Number 01700-44964  
Invoice number 10231

Matter: Sierra Community College District - General

Date	Atty	Services rendered	Hours	Amount
		Wickstrom.	0.75	108.75
08/12/02	AMS	Telephone conference with Robert Wickstrom; review and analysis of E-mail correspondence from Wickstrom's assistant	0.2	29.00
08/12/02	AMS	Prepare E-mail correspondence to Wickstrom's assistant	0.1	14.50
08/13/02	AMS	Initial review and analysis of two contracts sent by Robert Wickstrom	1.5	217.50
08/15/02	AMS	Lengthy conference with GWH re Sierra Contracts	0.5	N/C
08/21/02	GWH	Analysis of proposed revisions to Sierra College Rotary Fields Users Agreements and preparation of email to Robert Wickstrom re: same.	0.75	108.75
08/21/02	GWH	Analysis and preparation of email to Susan McVay re: ability of District to pay for service organization memberships.	0.5	72.50
08/21/02	GWH	Research, analysis and preparation of opinion email to Ron Martinez re: ability of part-time classified employees to work as substitutes and student aides.	0.5	72.50
08/21/02	GWH	Preparation of email to Ron Martinez re: retiree medical benefits arbitration.	0.6	87.00
08/21/02	GWH	Analysis and preparation		

September 25, 2002

PRIVILEGED AND CONFIDENTIAL

Our File Number 01700-44964  
Invoice number 10231

Matter: Sierra Community College District - General

Date	Atty	Services rendered	Hours	Amount
		possible District liabilities.	2.0	290.00
08/27/02	GWH	Preparation of email to Doug Smith re: telecommuting.	0.1	14.50
08/27/02	GWH	Further analysis and preparation of opinion letter re: Allied contract, with new materials from Robert Wickstrom.	3.85	558.25
08/28/02	GWH	Additional research re: telecommuting and collective bargaining issues.	2.2	319.00
08/28/02	GWH	Revisions to policy/regulations re: computer use. Preparation of email to Sue Helwick.	0.6	87.00
08/28/02	GWH	Telephone call to Mr. Robert Wickstrom -- left message re: Allied contract and new documents.	0.1	14.50
08/28/02	GWH	Review, analysis and preparation of opinion letter re: American Tower contract.	0.8	116.00
08/28/02	GWH	Exchange of email from Mandy Davies re: personnel issue (Glennie).	0.2	29.00
08/28/02	GWH	Additional research and preparation of Allied contract.	2.4	348.00
08/28/02	GWH	Preparation of email to Wende Rehwald re: status of personnel issue.	2.2	319.00

October 21, 2002

PRIVILEGED AND CONFIDENTIAL

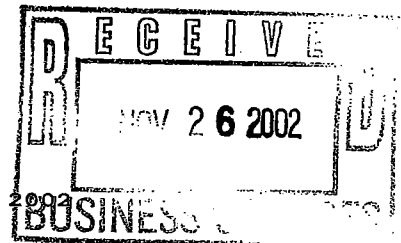
Our File Number 01700-44964  
Invoice number 10345

Matter: Sierra Community College District - General

Date	Atty	Services rendered	Hours	Amount
		automobile.	0.2	29.00
09/23/02	<del>GWH</del>	Receipt of faxed email correspondence re Brown Bear Home Care.	0.1	14.50
09/23/02	GWH	Exchange of e-mail with Ron Martinez re: PERB daycare issue.	0.2	29.00
09/23/02	<del>GWH</del>	Telephone call to Mr. M. Woodrow Wilson re: insurance clause for lease.	0.2	29.00
09/23/02	<del>GWH</del>	Telephone call to Mr. M. Woodrow Wilson re: limits for public bidding for improvements to leased property.	0.1	14.50
09/23/02	<del>GWH</del>	E-mail correspondence with Robert Wickstrom.	0.2	29.00
09/23/02	<del>GWH</del>	Telephone call from Robert Wickstrom re: Brown Bear janitorial contract, ability of District to sell surplus automobile.	0.1	14.50
09/23/02	<del>GWH</del>	E-mail correspondence with Robert Wickstrom.	0.9	130.50
09/23/02	<del>GWH</del>	Research re: whether tenant improvements by District to leased property require public bid.	0.5	72.50
09/24/02	<del>GWH</del>	Further analysis of Brown Bear Home Care janitorial contract.	3.3	478.50
09/24/02	<del>GWH</del>	E-mail from Karen Bridges re: consultant agreement for Mary Towne, Board agenda item, analysis, and		



JOHNS' SCHACHTER & COLLINS  
 A Professional Corporation  
 2180 Harvard Street, Suite 560  
 Sacramento, California 95815  
 (916) 921-5800 Tax ID # 68-0018049



November 23,

Sierra Community College District  
 Mr. Robert Wickstrom  
 5000 Rocklin Road  
 Rocklin, CA 95677

Our File Number 01700-02087  
 Invoice number 10385

Matter: F.U.S.E. Local 1212 v. Sierra CCD (PERB)

Interim Statement for Professional Services Rendered

Date	Atty	Services rendered	Hours	Amount
10/01/02	GWH	Telephone conference re: meeting with Darlene Jackson.	0.1	14.50
10/01/02	GWH	Preparation for meeting with Darlene Jackson.	0.9	130.50
10/01/02	GWH	Preparation for PERB informal hearing, analysis of documents, contracts, etc. from Ron Martinez and John Bukey, research re: contracting out, application of doctrine of past practice, impact of past practice at other District sites on alleged contracting out at Nevada County campus.	4.3	623.50
10/03/02	GWH	E-mail from Jeanne Leland re: result of her document search.	0.1	14.50
10/04/02	GWH	E-mail to Jeanne Leland re: document search.	0.1	14.50
10/04/02	GWH	Preparation for and attendance at meeting with Darlene Jackson re: upcoming informal hearing. Includes travel to Auburn.	3.3	478.50
10/07/02	GWH	Research re: possible		

28-7 →

SIX TEN & ASSOC.  
 2003 JAN 21 AM 10:57

November 23, 2002

Sierra Community College District

Our File Number 01700-02087  
Invoice number 10385

Matter: F.U.S.E. Local 1212 v. Sierra CCD (PERB)

Date	Atty	Services rendered	Hours	Amount
		motion to dismiss, whether contracting out requires that District pay its funds to alleged contracting entity.	2.7	391.50
10/07/02	GWH	Preparation for and attendance at Informal Conference, with travel.	5.5	797.50
10/08/02	GWH	Research re: whether prima facie case for contracting out requires that SCFA prove that District funds used for NCC child care center.	5.2	754.00
10/09/02	GWH	Receipt of Notice of Formal Hearing.	0.1	14.50
10/09/02	GWH	Research and analysis re: Education Code sections 8236 and 8327 re: agreements to establish child care centers, related personnel issues and alleged contracting out.	3.8	551.00
10/10/02	GWH	Preparation of extensive email to Ron Martinez and Darlene Jackson re: notice of formal hearing, analysis of Education Code sections 8236, 8320.	1.2	174.00
10/10/02	GWH	Analysis of documents from Darlene Jackson re: preparation of grant.	0.8	116.00
10/10/02	GWH	E-mail correspondence with Dr. Ron Martinez.	0.1	14.50
10/14/02	GWH	Exchange of email with Darlene Jackson re: day care.	0.3	43.50

28.7 →

SIX TEN & ASSOC.  
2003 JAN 21 AM 10:57

November 23, 2002

Sierra Community College District

Our File Number 01700-02087  
Invoice number 10385

Matter: F.U.S.E. Local 1212 v. Sierra CCD (PERB)

Date	Atty	Services rendered	Hours	Amount
10/14/02	GWH	Exchange of email with Darlene Jackson re: scheduling witness for formal hearing.	0.2	29.00
Total for professional services			28.7	\$4,161.50

Summary	Hours	Rate	Amount
George W. Holt	28.70	145.00	4,161.50
Total Current Fees and Costs			\$4,161.50

Previous Balance \$543.75

Invoice No	Credits to account	Amount
10/11/02 10240	Payment received check # 9047420	50.75CR
10/25/02 Multiple	Payment received check # 9051366	543.75CR
Total payments received		\$594.50CR
Total Amount Due and Payable		\$4,110.75

Payment Due Upon Receipt of Statement

P.O. 030274

2003 JAN 24 AM 10:58  
SIX TEN & ASSOC.

**REBILL**

3/5/03

November 23, 2002

Sierra Community College District  
 Peter Kolster  
 5000 Rocklin Road  
 Rocklin, CA 95677

Our File Number 01700-02035  
 Invoice number 10386

Matter: Eriksen, Torben v. Sierra CC (PERB) (\*)

Interim Statement for Professional Services Rendered

Date	Atty	Services rendered	Hours	Amount
10/01/02	GWH	E-mail correspondence with Dr. Ron Martinez	0.4	58.00
10/01/02	GWH	Preparation of email to Ron Martinez re: charging party's appeal.	0.1	14.50
10/09/02	GWH	Analysis of Erickson's demand that appeal hearing exceed scheduled 20 minutes.	0.5	72.50
10/10/02	GWH	Lengthy e-mail from Robin Wesley (PERB) re: settlement and telephone conference with Robin Wesley re: same.	0.3	43.50
10/10/02	GWH	Telephone call to Dr. Ron Martinez re: settlement agreement.	0.1	14.50
10/10/02	GWH	Telephone conference with Ron Martinez re: settlement agreement, time limit for appeal hearing.	0.1	14.50
10/22/02	GWH	Review of email from Jeanne Leland re: settlement proposal.	0.1	14.50
10/24/02	GWH	Preparation of email to Jeanne Leland re: status of signing settlement		

RECEIVED

MAR 11 2003

QUESTIONS

1.9 →

**PAST DUE**

**WE WOULD APPRECIATE YOUR PAYMENT TODAY!**

November 23, 2002

Sierra Community College District

Our File Number 01700-02035  
 Invoice number 10386

Matter: Eriksen, Torben v. Sierra CC (PERB) (\*)

Date	Atty	Services rendered	Hours	Amount
		agreement.	0.1	14.50
10/24/02	GWH	Review of email from Jeanne Leland re: status of settlement agreement.	0.1	14.50
10/24/02	GWH	Preparation of email to Jeanne Leland re: hearing date.	0.1	14.50
Total for professional services,			1.9	\$275.50

Summary	Hours	Rate	Amount
George W. Holt	1.90	145.00	275.50
Total Current Fees and Costs			\$275.50

Previous Balance \$1,200.88

Invoice No	Credits to account	Amount
0/11/02 10241	Payment received check # 9047420	1,200.88CR
Total payments received		\$1,200.88CR
Total Amount Due and Payable		\$275.50

Payment Due Upon Receipt of Statement

to Pay? Yes  No   
 Signature [Signature]  
 Date 8/13/03  
 P.O.# 032703

December 2, 2002

Sierra Community College District  
 Robert Wickstrom  
 5000 Rocklin Road  
 Rocklin, CA 95677

Our File Number 01700-00046  
 Invoice number 10436

Matter: Sierra CCD - Labor

Interim Statement for Professional Services Rendered

Date	Atty	Services rendered	Hours	Amount
10/09/02	GWH	Telephone conversation with Assoc. Dean Neil Albee re: non-tenure faculty review process, ability of Tenure Review Committee to use information on mid-year hire before beginning of Fall Semester review process; analysis and research re: Art. 18 of SCFA collective bargaining agreement. Preparation of lengthy email re: initial analysis.	3.9	565.50
0/10/02	GWH	Telephone call to Dean Neil Albee re: SCFA contract interpretation.	0.1	14.50
10/10/02	GWH	Telephone call from Dean Neil Albee re: interpretation of SCFA contract re: review of mid-year hires.	0.1	14.50
Total for professional services			4.1	\$594.50

Summary	Hours	Rate	Amount
George W. Holt	4.10	145.00	594.50

*Mandated Costs*

SIX TEN & ASSOC.  
 2003 JAN 21 AM 10:58

December 2, 2002

PRIVILEGED AND CONFIDENTIAL

Our File Number 01700-44964  
Invoice number 10435

Matter: Sierra Community College District - General

Date	Atty	Services rendered	Hours	Amount
① 10/01/02	GWH	E-mail from Sue Fisher re: pending agenda.	0.1	14.50
10/02/02	GWH	Telephone conference from Robert Wickstrom re: Martin Sanford.	0.1	14.50
10/02/02	GWH	Preparation of email to Robert Wickstrom re: HIPAA contract compliance amendment to UCDHS agreement.	0.4	58.00
10/02/02	GWH	Preparation of correspondence to attorney for Martin Sanford, additional research re: application of equitable estoppel to overpayment of wages.	2.1	304.50
10/02/02	GWH	Preparation of e-mail to Robert Wickstrom re: Martin Sanford.	0.1	14.50
② 10/02/02	GWH	Telephone conference with representative from DFEH re: Stern/McDonald.	0.1	14.50
10/02/02	GWH	E-mail correspondence with Robert Wickstrom	0.2	29.00
10/02/02	GWH	Preparation of email to Robert Wickstrom re: Martin Sanford, response to attorney's letter.	0.1	14.50
10/02/02	GWH	Research re: District obligations under Health Insurance Portability & Accounting Act, and proposed contract amendment from UCDHS.	1.5	217.50
10/02/02	GWH	E-mail correspondence with Robert Wickstrom.	0.1	14.50

2003 JAN 21 AM 10:58

SIX TEN &amp; ASSOC.

December 2, 2002

PRIVILEGED AND CONFIDENTIAL

Our File Number 01700-44964  
Invoice number 10435

Matter: Sierra Community College District - General

Date	Atty	Services rendered	Hours	Amount
10/14/02	AMS	Telephone call from Nancy Grimes and memo to file re same.	0.2	29.00
10/14/02	AMS	Telephone call from Jim Anderson (Grimes v. Grimes) and memo to file re same.	0.2	29.00
10/14/02	AMS	Review of faxed evaluation form for review.	0.1	14.50
③ 10/14/02	AMS	Telephone call from Morgan Lynn and telephone conference with Morgan Lynn re student faculty evaluation forms and memo to file re same.	0.5	72.50
④ 10/14/02	GWH	Receipt of faxed communication from Doug Smith re same time faculty compensation.	0.1	14.50
⑤ 10/14/02	GWH	Preparation for and attendance at disciplinary hearing. Meetings with Doug Smith and Robert Wickstrom re: various issues. Travel to District offices.	4.8	696.00
10/14/02	GWH	Preparation of email to Wende Rehwald re: FERPA and HIPAA, research and analysis re: whether student counseling records covered by FERPA or HIPAA.	1.8	261.00
10/14/02	GWH	Preparation of email to Doug Smith and Robert Wickstrom re: copyright issues.	0.1	14.50
10/14/02	GWH	Research re: copyright issues related to faculty		

SIX TEN & ASSOC.  
2003 JAN 21 AM 10:58



December 26, 2002

PRIVILEGED AND CONFIDENTIAL

Our File Number 01700-44964  
Invoice number 10512

Matter: Sierra Community College District - General

Date	Atty	Services rendered	Hours	Amount
11/12/02	GWH	Preparation of email to Robert Wickstrom re: City of Roseville contract (fire instruction).	0.1	14.50
11/12/02	GWH	Email from George Holt to Jeanne Ireland re: health benefits arbitration.	0.1	14.50
11/13/02	MWH	Telephone call with office of Catherine Harris scheduling arbitration of medical expenses dispute.	0.1	13.00
11/14/02	GWH	Telephone conference from Ron Martinez re: Mary Conway.	0.15	21.75
11/14/02	GWH	Analysis of e-mail from Ron Martinez re: Mary Conway; receipt of facsimile from Ron Martinez re: Mary Conway; begin analysis and preparation of correspondence to Mary Conway.	1.75	253.75
/14/02	GWH	Review of email from Ron Martinez re: Mary Conway agreement.	0.15	21.75
11/14/02	MWH	Letter to arbitrator confirming arbitration.	0.1	13.00
11/15/02	GWH	Telephone conversation with Jenny at Business Office re: release forms for Study Abroad Program.	0.1	14.50
11/15/02	GWH	Further analysis of Mary Conway materials and preparation of draft letter to Conway, analysis of conditions of continued employment.	1.35	195.75

**REBILL**

3/5/03

December 26, 2002

Sierra Community College District  
 Peter Kolster  
 5000 Rocklin Road  
 Rocklin, CA 95677

Our File Number 01700-02035  
 Invoice number 10523

Matter: Eriksen, Torben v. Sierra CC (PERB) (\*)  
 Interim Statement for Professional Services Rendered

Date	Atty	Services rendered	Hours	Amount
10/02/02	GWH	E-mail from Jeanne Leland re: scheduling new appeal hearing for Eriksen.	0.1	14.50
10/02/02	GWH	E-mail from Ronald Martinez re: scheduling Eriksen appeal hearing.	0.1	14.50
11/06/02	GWH	Receipt of Notice of Withdrawal.	0.1	14.50
11/07/02	GWH	Telephone conversation with PERB re: status.	0.1	14.50
11/11/02	GWH	Preparation of correspondence to Ron Martinez re: case closure notice from PERB.	0.3	43.50
12/09/02	GWH	Preparation of email to Jeanne Leland re: appeal.	0.1	14.50
12/09/02	GWH	E-mail from Jeanne Leland re: status of appeal.	0.1	14.50
Total for professional services			0.9	\$130.50

Summary	Hours	Rate	Amount
George W. Holt	0.90	145.00	130.50

RECEIVED  
 MAR 11 2003

*Handwritten:* This copy to H. Kolster

**PAST DUE!**  
 WE WOULD APPRECIATE YOUR  
 PAYMENT TODAY!

February 28, 2003

PRIVILEGED AND CONFIDENTIAL

Our File Number 01700-44964  
Invoice number 10722

Matter: Sierra Community College District - General

Date	Atty	Services rendered	Hours	Amount
01/21/03	GWH	Review of email from Susan McVay re: lobbying.	0.1	14.50
01/21/03	GWH	Telephone call to Ms. Susan E. McVay re: lobbying research memorandum.	0.1	14.50
01/22/03	GWH	Research and preparation of opinion re: whether probationary classified employees can be offered critical vacancies.	1.1	159.50
01/22/03	GWH	Telephone conference with Ron Martinez re: layoff of classified employees.	0.1	14.50
01/22/03	GWH	Analysis of copier invoice and preparation of additional language.	0.65	94.25
01/22/03	GWH	E-mail from Tina Ludutsky-Taylor re: analysis of proposed commentary for local newspaper for lobbying compliance.	0.1	14.50
01/22/03	GWH	Analysis of Konica invoice, preparation of language re: lease, purchase of copier, preparation of email to Robert Wickstrom re: same.	0.5	72.50
01/22/03	GWH	Telephone call to Ms. Jeanne Leland re: layoff of classified employees.	0.1	14.50
01/22/03	GWH	Telephone conference with Carla Epting-Davis re: lobbying issues.	0.15	21.75
01/22/03	GWH	Telephone conference with Robert Wickstrom and Doug		

February 28, 2003

Sierra Community College District  
 Mr. Robert Wickstrom  
 5000 Rocklin Road  
 Rocklin, CA 95677

Our File Number 01700-02087  
 Invoice number 10725

Matter: F.U.S.E. Local 1212 v. Sierra CCD (PERB)

Interim Statement for Professional Services Rendered

Date	Atty	Services rendered	Hours	Amount
01/02/03	GWH	Begin preparation for hearing re: child care center employees.	5.75	833.75
01/13/03	GWH	Preparation for PERB hearing.	5.75	833.75
01/14/03	GWH	Preparation of email to Judy McClymonds re: PERB hearing.	0.1	14.50
01/14/03	GWH	Review of e-mail from Judy McClymonds re: PERB hearing.	0.1	14.50
01/14/03	GWH	Preparation for PERB hearing.	4.5	652.50
01/21/03	AMS	Analysis of probationary classified personnel issue regarding NCC campus and recommendations regarding how best to proceed.	0.3	43.50
01/21/03	GWH	Further preparation for hearing.	5.65	819.25
01/22/03	GWH	Preparation for PERB hearing.	6.35	920.75
01/23/03	GWH	Further preparation for PERB hearing.	5.0	725.00
01/24/03	GWH	Preparation of email to		

60.7 →

February 28, 2003

Sierra Community College District

Our File Number 01700-02087

Invoice number 10725

Matter: F.U.S.E. Local 1212 v. Sierra CCD (PERB)

Date	Atty	Services rendered	Hours	Amount
		Ron Martinez and Darlene Jackson re: PERB hearing.	0.1	14.50
01/24/03	GWH	Review of email from Darlene Jackson re: meeting to prepare for hearing.	0.1	14.50
01/24/03	GWH	E-mail from George Holt to Darlene Jackson re: organizing meeting.	0.1	14.50
01/24/03	GWH	Preparation for hearing.	5.35	775.75
01/25/03	GWH	E-mail from Ron Martinez re: meeting to brainstorm case.	0.1	14.50
01/27/03	GWH	Further preparation for PERB hearing.	3.1	449.50
01/28/03	GWH	Further preparation for PERB hearing.	7.2	1,044.00
01/29/03	GWH	Further preparation for PERB hearing.	7.3	1,058.50
/30/03	GWH	Further preparation for PERB hearing.	3.85	558.25
Total for professional services			60.7	\$8,801.50

Summary	Hours	Rate	Amount
Alesa M. Schachter	0.30	145.00	43.50
George W. Holt	60.40	145.00	8,758.00
Total Current Fees and Costs			\$8,801.50
Total Amount Due and Payable			\$8,801.50

February 28, 2003

Sierra Community College District  
Robert Wickstrom  
5000 Rocklin Road  
Rocklin, CA 95677

Our File Number 01700-00046  
Invoice number 10724

Matter: Sierra CCD - Labor

Interim Statement for Professional Services Rendered

Date	Atty	Services rendered	Hours	Amount
01/02/03	GWH	Begin preparation for PERB hearing.	5.85	848.25
01/08/03	GWH	Preparation for non-binding arbitration of medical benefits issues.	6.5	942.50
01/13/03	GWH	Preparation for and attend teleconference with Sanchez, arbitrator Harris re: medical benefits arbitration.	0.85	123.25
01/21/03	GWH	Review of email from Jeanne Leland re: possible new procedure for filling classified vacancies.	0.1	14.50
01/22/03	GWH	Analysis of proposed newspaper commentary from Tina Ludutsky-Taylor for lobbying compliance, preparation of email re: same.	0.5	72.50
01/23/03	GWH	Review of email from Robert Wickstrom re: retiree medical trust benefit.	0.1	14.50
01/23/03	GWH	Preparation of email to Doug Smith, Robert Wickstrom re: retiree medical plan trust.	0.1	14.50

February 28, 2003

Sierra Community College District  
Mr. Robert Wickstrom  
5000 Rocklin Road  
Rocklin, CA 95677

Our File Number 01700-02087  
Invoice number 10725

Matter: F.U.S.E. Local 1212 v. Sierra CCD (PERB)

Interim Statement for Professional Services Rendered

Date	Atty	Services rendered	Hours	Amount
01/02/03	GWH	Begin preparation for hearing re: child care center employees.	5.75	833.75
01/13/03	GWH	Preparation for PERB hearing.	5.75	833.75
01/14/03	GWH	Preparation of email to Judy McClymonds re: PERB hearing.	0.1	14.50
01/14/03	GWH	Review of e-mail from Judy McClymonds re: PERB hearing.	0.1	14.50
01/14/03	GWH	Preparation for PERB hearing.	4.5	652.50
01/21/03	AMS	Analysis of probationary classified personnel issue regarding NCC campus and recommendations regarding how best to proceed.	0.3	43.50
01/21/03	GWH	Further preparation for hearing.	5.65	819.25
01/22/03	GWH	Preparation for PERB hearing.	6.35	920.75
01/23/03	GWH	Further preparation for PERB hearing.	5.0	725.00
01/24/03	GWH	Preparation of email to		

60.7 →

February 28, 2003

Sierra Community College District

Our File Number 01700-02087  
Invoice number 10725

Matter: F.U.S.E. Local 1212 v. Sierra CCD (PERB)

Date	Atty	Services rendered	Hours	Amount
		Ron Martinez and Darlene Jackson re: PERB hearing.	0.1	14.50
01/24/03	GWH	Review of email from Darlene Jackson re: meeting to prepare for hearing.	0.1	14.50
01/24/03	GWH	E-mail from George Holt to Darlene Jackson re: organizing meeting.	0.1	14.50
01/24/03	GWH	Preparation for hearing.	5.35	775.75
01/25/03	GWH	E-mail from Ron Martinez re: meeting to brainstorm case.	0.1	14.50
01/27/03	GWH	Further preparation for PERB hearing.	3.1	449.50
01/28/03	GWH	Further preparation for PERB hearing.	7.2	1,044.00
01/29/03	GWH	Further preparation for PERB hearing.	7.3	1,058.50
1/30/03	GWH	Further preparation for PERB hearing.	3.85	558.25
Total for professional services			60.7	\$8,801.50

Summary	Hours	Rate	Amount
Alesa M. Schachter	0.30	145.00	43.50
George W. Holt	60.40	145.00	8,758.00
Total Current Fees and Costs			\$8,801.50
Total Amount Due and Payable			\$8,801.50



February 28, 2003

Sierra Community College District  
 Robert Wickstrom  
 5000 Rocklin Road  
 Rocklin, CA 95677

Our File Number 01700-00046  
 Invoice number 10724

Matter: Sierra CCD - Labor

Interim Statement for Professional Services Rendered

Date	Atty	Services rendered	Hours	Amount
01/02/03	GWH	Begin preparation for PERB hearing.	5.85	848.25
01/08/03	GWH	Preparation for non-binding arbitration of medical benefits issues.	6.5	942.50
01/13/03	GWH	Preparation for and attend teleconference with Sanchez, arbitrator Harris re: medical benefits arbitration.	0.85	123.25
01/21/03	GWH	Review of email from Jeanne Leland re: possible new procedure for filling classified vacancies.	0.1	14.50
01/22/03	GWH	Analysis of proposed newspaper commentary from Tina Ludutsky-Taylor for lobbying compliance, preparation of email re: same.	0.5	72.50
01/23/03	GWH	Review of email from Robert Wickstrom re: retiree medical trust benefit.	0.1	14.50
01/23/03	GWH	Preparation of email to Doug Smith, Robert Wickstrom re: retiree medical plan trust.	0.1	14.50

March 31, 2003

Sierra Community College District  
 Robert Wickstrom  
 5000 Rocklin Road  
 Rocklin, CA 95677

Our File Number 01700-00046  
 Invoice number 10842

Matter: Sierra CCD - Labor

Interim Statement for Professional Services Rendered

Date	Atty	Services rendered	Hours	Amount
02/03/03	GWH	Preparation for medical benefits arbitration.	7.75	1,123.75
02/06/03	GWH	Research and begin preparation opinion letter to Dr. Martinez re: open recruitment, FUSE contract, and reorganization of classified positions re: budget crisis.	4.35	630.75
02/07/03	GWH	Research re: open and in-house recruitment of classified employees, including research re: labor issues.	1.2	174.00
02/07/03	GWH	Review of email from Ron Martinez re: open recruitment interpretation of collective bargaining agreement.	0.1	14.50
02/07/03	GWH	Further preparation for medical benefits arbitration.	3.5	507.50
02/07/03	GWH	Preparation of second e-mail to Ron Martinez re: open recruitment interpretation of collective bargaining agreement.	0.1	14.50

March 31, 2003

Sierra Community College District

Our File Number 01700-00046  
Invoice number 10842

Matter: Sierra CCD - Labor

Date	Atty	Services rendered	Hours	Amount
02/08/03	GWH	E-mail from Doug Smith re: benefits negotiations.	0.1	14.50
02/11/03	GWH	Preparation for arbitration re: health benefits.	7.3	1,058.50
02/11/03	GWH	Review of extensive email from Luis Sanchez re: possible settlement of medical benenfits issues.	0.25	36.25
02/11/03	GWH	Preparation for arbitration re: health benefits.	7.3	1,058.50
02/12/03	AMS	Telephone conference with superintendent and other administrators regarding personnel issue, and telephone call to investigator regarding same.	0.3	43.50
02/12/03	GWH	Preparation of witness and exhibit list for medical benefits arbitration.	0.1	14.50
2/12/03	GWH	Preparation of email to Ron Martinez re: medical benefits arbitration and possible settlement.	0.1	14.50
02/13/03	GWH	Exchange of several email with Luis Sanchez re: health benefits arbitration.	0.4	58.00
02/14/03	GWH	Further preparation for health care benefits arbitration hearing.	6.35	920.75
02/19/03	AMS	Conferences with investigator re findings and investigation; research regarding cause		

March 31, 2003

Sierra Community College District

Our File Number 01700-00046  
Invoice number 10842

Matter: Sierra CCD - Labor

Date	Atty	Services rendered	Hours	Amount
		required to provide March 15th notice for certificated contract employee in 4th year.	1.0	145.00
02/19/03	GWH	Analysis of collective bargaining agreement re: rights of third contract faculty member to hearing or other process. Employee accused of improper use of auto repair shop for personal business.	0.75	108.75
02/19/03	GWH	Review of email from Luis Sanchez re: possible settlement conference.	0.1	14.50
02/19/03	GWH	Preparation of email to Luis Sanchez re: details of arbitration hearing.	0.1	14.50
02/19/03	GWH	Review of email from Luis Sanchez re: health benefits arbitration.	0.1	14.50
/19/03	GWH	Preparation of email to Luis Sanchez re: health benefits arbitration.	0.1	14.50
02/21/03	GWH	Preparation of analysis of issues for medical benefits arbitration.	0.1	14.50
02/25/03	AMS	Meeting with investigator re status of investigation concerning personnel issue; research regarding further handling recommendations.	0.5	72.50
Total for professional services			41.95	\$6,082.75

March 31, 2003

Sierra Community College District  
 Robert Wickstrom  
 5000 Rocklin Road  
 Rocklin, CA 95677

Our File Number 01700-00046  
 Invoice number 10842

Matter: Sierra CCD - Labor

Interim Statement for Professional Services Rendered

Date	Atty	Services rendered	Hours	Amount
02/03/03	GWH	Preparation for medical benefits arbitration.	7.75	1,123.75
02/06/03	GWH	Research and begin preparation opinion letter to Dr. Martinez re: open recruitment, FUSE contract, and reorganization of classified positions re: budget crisis.	4.35	630.75
02/07/03	GWH	Research re: open and in-house recruitment of classified employees, including research re: labor issues.	1.2	174.00
02/07/03	GWH	Review of email from Ron Martinez re: open recruitment interpretation of collective bargaining agreement.	0.1	14.50
02/07/03	GWH	Further preparation for medical benefits arbitration.	3.5	507.50
02/07/03	GWH	Preparation of second e-mail to Ron Martinez re: open recruitment interpretation of collective bargaining agreement.	0.1	14.50

March 31, 2003

Sierra Community College District

Our File Number 01700-00046  
Invoice number 10842

Matter: Sierra CCD - Labor

Date	Atty	Services rendered	Hours	Amount
02/08/03	GWH	E-mail from Doug Smith re: benefits negotiations.	0.1	14.50
02/11/03	GWH	Preparation for arbitration re: health benefits.	7.3	1,058.50
02/11/03	GWH	Review of extensive email from Luis Sanchez re: possible settlement of medical benefits issues.	0.25	36.25
02/11/03	GWH	Preparation for arbitration re: health benefits.	7.3	1,058.50
02/12/03	AMS	Telephone conference with superintendent and other administrators regarding personnel issue, and telephone call to investigator regarding same.	0.3	43.50
02/12/03	GWH	Preparation of witness and exhibit list for medical benefits arbitration.	0.1	14.50
2/12/03	GWH	Preparation of email to Ron Martinez re: medical benefits arbitration and possible settlement.	0.1	14.50
02/13/03	GWH	Exchange of several email with Luis Sanchez re: health benefits arbitration.	0.4	58.00
02/14/03	GWH	Further preparation for health care benefits arbitration hearing.	6.35	920.75
02/19/03	AMS	Conferences with investigator re findings and investigation; research regarding cause		

March 31, 2003

Sierra Community College District

Our File Number 01700-00046

Invoice number 10842

Matter: Sierra CCD - Labor

Date	Atty	Services rendered	Hours	Amount
		required to provide March 15th notice for certificated contract employee in 4th year.	1.0	145.00
02/19/03	GWH	Analysis of collective bargaining agreement re: rights of third contract faculty member to hearing or other process. Employee accused of improper use of auto repair shop for personal business.	0.75	108.75
02/19/03	GWH	Review of email from Luis Sanchez re: possible settlement conference.	0.1	14.50
02/19/03	GWH	Preparation of email to Luis Sanchez re: details of arbitration hearing.	0.1	14.50
02/19/03	GWH	Review of email from Luis Sanchez re: health benefits arbitration.	0.1	14.50
/19/03	GWH	Preparation of email to Luis Sanchez re: health benefits arbitration.	0.1	14.50
02/21/03	GWH	Preparation of analysis of issues for medical benefits arbitration.	0.1	14.50
02/25/03	AMS	Meeting with investigator re status of investigation concerning personnel issue; research regarding further handling recommendations.	0.5	72.50
Total for professional services			41.95	\$6,082.75

May 8, 2003

Sierra Community College District  
 Mr. Robert Wickstrom  
 5000 Rocklin Road  
 Rocklin, CA 95677

Our File Number 01700-02087  
 Invoice Number 10873

Matter Name: F.U.S.E. Local 1212 v. Sierra CCD (PERB) (\*)

Final Statement for Professional Services Rendered

Date	Atty	Services rendered	Hours	Amount
02/04/03	GWH	Review of fax re settlement proposal.	0.1	14.50
02/04/03	GWH	Preparation for PERB hearing.	7.5	1,087.50
02/04/03	GWH	Telephone conference with Darlene Jackson re: FUSE settlement offer.	0.2	29.00
02/05/03	GWH	Meeting w/ Darlene Jackson, R. Martinez - Preparation for PERB hearing. At CDC-Grass Valley.	5.0	725.00
05/03	GWH	Preparation for PERB hearing.	4.8	696.00
02/06/03	GWH	Telephone conference with Mr. Patrick Hallahan re: settlement offer.	0.2	29.00
02/06/03	GWH	Telephone call to Dr. Ron Martinez re: possible new settlement conference.	0.1	14.50
02/07/03	GWH	Telephone conference with Mr. Patrick Hallahan re: possible settlement conference.	0.1	14.50
02/10/03	GWH	E-mail from Darlene Jackson re: child		

0.15 →



May 8, 2003

Sierra Community College District

Our File Number 01700-02087  
Invoice Number 10873

Matter Name: F.U.S.E. Local 1212 v. Sierra CCD (PERB) (\*)

Date	Atty	Services rendered	Hours	Amount
		development center funding.	0.1	14.50
02/11/03	GWH	Review of faxed notice from Labor Consultants re Settlement Conference dates.	0.1	14.50
02/12/03	AMS	Analysis and planning re motion to dismiss for lack of standing.	0.4	58.00
02/12/03	GWH	Research re: whether permitted child care center workers are classified or certificated, preparation of affirmative defense re: same.	6.25	906.25
02/12/03	GWH	Preparation of extensive email to Darlene Jackson re: research re: status of permitted day care workers as classified employees.	0.4	58.00
02/12/03	GWH	Preparation of lengthy email to Darlene Jackson re: Education Code section 8360(b).	0.25	36.25
02/13/03	GWH	Research and preparation of correspondence to Pat Hallahan re: Grass Valley employees as certificated, not classified, and lack of standing of FUSE to maintain PERB action.	3.25	471.25
02/13/03	GWH	Additional research re: permitted or classified child care workers issue and lack of standing by FUSE to persue action.	5.1	739.50
02/13/03	GWH	Preparation of email to Ron Martinez and Darlene		

40.15 →

May 8, 2003

Sierra Community College District

Our File Number 01700-02087

Invoice Number 10873

Matter Name: F.U.S.E. Local 1212 v. Sierra CCD (PERB) (\*)

Date	Atty	Services rendered	Hours	Amount
		Jackson re: letter sent to Pat Hallahan re: status of day care workers.	0.1	14.50
02/13/03	GWH	Telephone conference with Ms. Susan E. McVay re: Board minutes showing authorization to sign MOU with Grass Vally USD for child development center.	0.1	14.50
02/13/03	GWH	Telephone conference with Darlene Jackson re: permitted child care employees as part of certificated service.	0.2	29.00
02/13/03	GWH	Telephone call to Mr. Patrick Hallahan re: possible continuance of PERB hearing to allow District to bring motion to dismiss.	0.1	14.50
02/13/03	GWH	Telephone conference with Darlene Jackson re: obtaining Grass Valley employees' child development permits.	0.1	14.50
02/13/03	GWH	Telephone conference with Darlene Jackson re: possible motion to dismiss.	0.1	14.50
02/13/03	GWH	Telephone conference with Mr. Patrick Hallahan re: possible motion to dismiss and settlement.	0.25	36.25
02/13/03	GWH	Telephone conference with Mr. Les Chisholm of PERB re: settlement conference.	0.1	14.50
02/13/03	GWH	Telephone conference with Mr. Patrick Hallahan re: standing research.	0.1	14.50

40.15

May 8, 2003

Sierra Community College District

Our File Number 01700-02087  
Invoice Number 10873

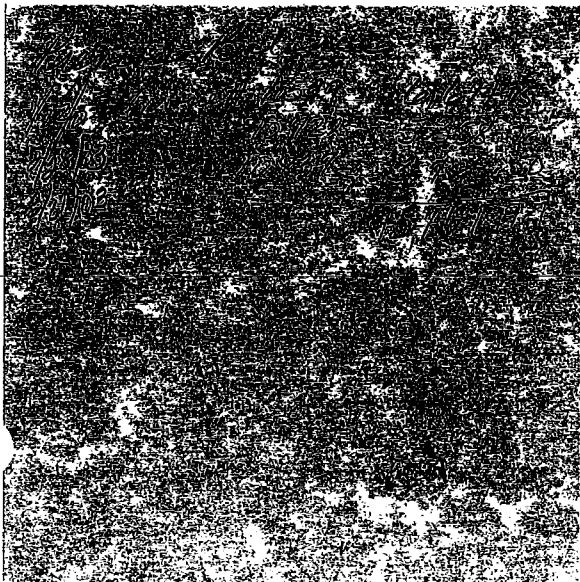
Matter Name: F.U.S.E. Local 1212 v. Sierra CCD (PERB) (\*)

Date	Atty	Services rendered	Hours	Amount
02/13/03	GWH	Telephone conference with Darlene Jackson re: status of PERB hearing and settlement conference.	0.1	14.50
02/14/03	GWH	Preparation of extensive correspondence to Patrick Hallahan containg research re: standing issue.	0.75	108.75
02/14/03	GWH	Preparation of email to Ron Martinez and Darlene Jackson re: status of permitted child care workers.	0.1	14.50
02/14/03	GWH	Research re: status of permitted child care workers.	0.3	43.50
02/18/03	GWH	Initial review and analysis of faxed correspondence from Patrick Hallahan.	0.1	14.50
02/18/03	GWH	Preparation for and attend PERB settlement conference, with travel.	3.0	435.00
02/18/03	GWH	Review of email from Ron Martinez re: Hallahan lawsuit.	0.1	14.50
02/18/03	GWH	Research re: Pat Hallahan wrongful termination lawsuit and preparation of email to Ron Martinez.	0.5	72.50
02/28/03	GWH	Review of Withdrawal of Charge filed by FUSE.	0.1	14.50
03/03/03	GWH	Review of Notice of Withdrawal.	0.1	14.50
Total for professional services			40.15	\$5,821.75

	<u>Hrs/Rate</u>	<u>Amount</u>
03/20/03 GWH (Delta Dental) Initial review of revisions to contract.	0.20 145.00/hr	29.00
GWH (Genuity, Inc.) Initial review of Order re Bankruptcy Court of New York.	0.20 145.00/hr	29.00
03/21/03 GWH Research re: placement of newspaper stands on campus, ability of District to ban or restrict.	0.50 145.00/hr	72.50
GWH Analysis of Mike Dobeck medical condition re: possible reasonable accommodation.	6.00 145.00/hr	870.00
GWH (Alex Wong) Review of faxed correspondence from Ron Martinez.	0.20 145.00/hr	29.00
For professional services rendered	24.70	\$3,581.50
Previous balance		\$15,761.97
<b>Balance due</b>		<b>\$19,343.47</b>

**Timekeeper Summary**

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
George W. Holt	24.70	145.00	\$3,581.50



*[Handwritten Signature]*  
OK to pay

P.D. 032703

		<u>Hrs/Rate</u>	<u>Amount</u>
03/13/03	GWH Preparation of email to Ron Martinez re: March 15 notice.	0.20 145.00/hr	29.00
	GWH Research and preparation of March 15 notice for Alex Wong.	0.80 145.00/hr	116.00
03/21/03	AMS Conference with Ron Martinez regarding personnel/request for accommodation issue; analysis re same and recommendations for handling.	0.50 145.00/hr	72.50
03/24/03	AMS Meeting with investigator Simlick regarding findings of investigation and recommendations regarding further investigation and further handling regarding non-tenured faculty member.	0.50 145.00/hr	72.50
	GWH Review of e-mail from Carla Epting-Davis re: Article 2 and FUSE negotiations.	0.20 145.00/hr	28.96
	GWH Review of e-mail from Carla Epting-Davis re: Education Code section 88003.	0.20 145.00/hr	28.96
03/25/03	GWH Telephone call to Ms. Jeanne Leland re mid-year hiring of faculty.	0.20 145.00/hr	28.96
	GWH Research and analysis re: mid-year hiring of faculty.	2.30 145.00/hr	333.50
03/26/03	GWH E-mail from Carla Epting-Davis re: Education Code section 88003 and Article 2.	0.20 145.00/hr	28.96
	GWH Analysis of e-mail from Mandy Davies re: questions regarding Article 2.	0.20 145.00/hr	29.00
	GWH Prepare detailed e-mail to Mandy Davies requesting information for analysis of Article 2.	0.40 145.00/hr	58.00
	GWH Analysis of detailed e-mail from Mandy Davies re: answers to questions for analysis of Article 2, further analysis and preparation of draft Article 2.	6.30 145.00/hr	913.50

		<u>Hrs/Rate</u>	<u>Amount</u>
03/26/03	GWH Preparation of e-mail to Mandy Davies re: Article 2.	0.20 145.00/hr	28.96
	GWH Analysis of e-mail from Mandy Davies re: Article 2.	0.20 145.00/hr	28.96
03/27/03	GWH Preparation of e-mail to Jeanne Leland re: Article 2.	0.20 145.00/hr	28.96
	AMS Lengthy telephone conference with investigator regarding interview with non-tenured certificated employee, findings based on investigation and further handling.	0.50 145.00/hr	72.50
	GWH Detailed analysis of Article 2 amended for collective bargaining negotiations and preparation of significant amendments. Preparation of e-mail to Mandy Davies.	3.30 145.00/hr	478.50
	GWH Analysis, research and preparation of proposed District response to FUSE's revised Article 2.	3.00 145.00/hr	435.00
	GWH Analysis of e-mail from Jeanne Leland re: Article 2.	0.20 145.00/hr	28.96
	GWH Preparation of e-mail to Jeanne Leland re: amendment to Article 2.	0.20 145.00/hr	28.96
	GWH Analysis of e-mail from Mandy Davies re: Article 2 amendment.	0.20 145.00/hr	28.96
	GWH Preparation of e-mail to Mandy Davies re: negotiations for amended Article 2.	0.20 145.00/hr	29.00
03/31/03	GWH Analysis of second e-mail from Luis Sanchez re: retiree medical benefits.	0.20 145.00/hr	28.96
	GWH Preparation of second e-mail to Luis Sanchez re: retiree medical benefits negotiation.	0.20 145.00/hr	28.96
	GWH Analysis of e-mail from Louise Sanchez re: retiree medical benefits.	0.20 145.00/hr	28.96

	<u>Hrs/Rate</u>	<u>Amount</u>
03/31/03 AMS Telephone conference with Morgan Lynn regarding certificated personnel issue.	0.30 145.00/hr	43.50
GWH Preparation of e-mail to Luis Sanchez re: retiree medical benefits.	0.20 145.00/hr	28.96
AMS Telephone conference with investigator.	0.30 145.00/hr	43.50
For professional services rendered	<u>37.40</u>	<u>\$5,422.44</u>
Previous balance	<i>Invoices</i> <i>10724 + 10842</i> ←	\$8,112.75
<b>Balance due</b>		<u><u>\$13,535.19</u></u>

**Timekeeper Summary**

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Alesa M. Schachter	5.80	145.00	\$841.00
George W. Holt	31.60	145.00	\$4,581.44

*DSJ*  
*OK to pay*

*P.O. 032703*

# JOHNSON SCHACHTER & COLLINS

A Professional Corporation  
California Plaza  
2180 Harvard Street, Suite 560  
Sacramento, CA 95815  
Telephone: (916) 921-5800  
Tax ID #68-0018049

PRIVILEGED & CONFIDENTIAL

May 12, 2003

SIERRA JOINT COMMUNITY COLLEGE  
PETER KOLSTER  
5000 ROCKLIN RD  
ROCKLIN CA 95677

Invoice No. 20130

In Reference To: Eriksen, Torben v. Sierra Community College District (PERB) (\*)  
Our File No. 02035

## Final Statement for Professional Services Rendered

	<u>Hrs/Rate</u>	<u>Amount</u>
03/03/03 GWH Review of email from Ron Martinez re Appeals Committee hearing.	0.20 145.00/hr	29.00
GWH Preparation of email to Robin Wesley of PERB re: status of appeal.	0.20 145.00/hr	29.00
03/12/03 GWH E-mail from Jeanne Leland re: date of appeal hearing.	0.20 145.00/hr	29.00
03/13/03 GWH E-mail from Robin Wesley (PERB).	0.20 145.00/hr	29.00
GWH E-mail to Robin Wesley (PERB) re: appeal.	0.20 145.00/hr	29.00
GWH E-mail to Jeanne Leland re: appeal.	0.20 145.00/hr	29.00
For professional services rendered	1.20	\$174.00
Previous balance		\$406.00

*w/ check paid  
09062083  
on 3/20/03*

*Invoice #10386 - \$275.50  
Invoice #10523 - \$130.50  
\$406.00*



8/2/03

# JOHNSON SCHACHTER & COLLINS

A Professional Corporation  
California Plaza  
2180 Harvard Street, Suite 560  
Sacramento, CA 95815  
Telephone: (916) 921-5800  
Tax ID #68-0018049

PRIVILEGED & CONFIDENTIAL  
SIERRA JOINT COMMUNITY COLLEGE  
ROBERT WICKSTROM  
5000 ROCKLIN RD  
ROCKLIN CA 95677

June 04, 2003

Invoice No. 20205

In Reference To: Sierra CCD - labor  
Our File No. 00046

## Interim Statement for Professional Services Rendered

		<u>Hrs/Rate</u>	<u>Amount</u>
04/01/03	GWH Preparation of e-mail to Luis Sanchez re: retiree medical benefits negotiation.	0.20 145.00/hr	28.96
	GWH Analysis of e-mail from Luis Sanchez re: retiree medical benefits negotiations.	0.20 145.00/hr	28.96
04/02/03	GWH Additional exchange of email with Luis Sanchez re: retiree benefits negotiations.	0.50 145.00/hr	72.50
04/04/03	GWH Telephone call to Dr. Ron Martinez -- left message re: meeting with Luis Sanchez.	0.10 145.00/hr	14.50
	GWH Preparation for and attend meeting with Luis Sanchez re: negotiations to resolve retiree medical benefits issue.	1.50 145.00/hr	217.50
04/09/03	GWH E-mail from Luis Sanchez re: proposal for medical benefits agreement.	0.30 145.00/hr	43.50
04/25/03	GWH Additional research re: vacation issue.	4.90 145.00/hr	710.50

For professional services rendered

7.70 \$1,116.42

**JOHNSON SCHACHTER & COLLINS**

A Professional Corporation

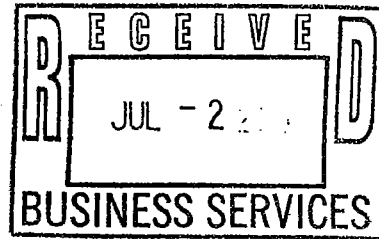
California Plaza

2180 Harvard Street, Suite 560

Sacramento, CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049



PRIVILEGED & CONFIDENTIAL

June 17, 2003

SIERRA JOINT COMMUNITY COLLEGE

ROBERT WICKSTROM

5000 ROCKLIN RD

ROCKLIN CA 95677

Invoice No. 20238

In Reference To: Sierra CCD - labor  
Our File No. 00046

**Interim Statement for Professional Services Rendered**

	<u>Hrs/Rate</u>	<u>Amount</u>
05/23/03 GWH E-mail from George Holt to Doug Smith, et al, re: draft retiree's held benefits settlement document.	0.30 145.00/hr	43.50
For professional services rendered	0.30	\$43.50
<b>Additional Charges :</b>		
05/16/03 WestLaw research charges for April 2003		88.38
Total costs		\$88.38
Total amount of this bill		\$131.88
Previous balance		\$12,751.61
5/5/2003 Payment - Thank You. Check No. 09063690		(\$6,082.75)
Total payments and adjustments		(\$6,082.75)

# JOHNSON SCHACHTER & COLLINS

A Professional Corporation

California Plaza

2180 Harvard Street, Suite 560

Sacramento, CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

PRIVILEGED & CONFIDENTIAL

SIERRA JOINT COMMUNITY COLLEGE

ROBERT WICKSTROM

5000 ROCKLIN RD

ROCKLIN CA 95677

July 31, 2003

Invoice No 20377

In Reference To: Sierra CCD - labor  
Our File No. 00046

## Interim Statement for Professional Services Rendered

	<u>Hrs/Rate</u>	<u>Amount</u>
04/07/03 GWH Correspondence from Jenne' Hallam re: Medical Expenses Reimbursement Plan.	0.20 145.00/hr	29.00
04/29/03 GWH Review of correspondence from Doug Smith re: mandatory vacation for retirees.	0.20 145.00/hr	29.00
06/03/03 GWH Further analysis retiree health benefits issues.	2.30 145.00/hr	333.50
06/05/03 GWH E-mail from Doug Smith re: Section 2 of health benefits release.	0.20 145.00/hr	29.00
GWH Correspondence from George Holt to Robert Wickstrom re: retiree medical benefits draft settlement.	0.20 145.00/hr	29.00
GWH Analysis and research re: Section 2 of health benefits release.	6.50 145.00/hr	942.50
For professional services rendered	9.60	\$1,392.00

		<u>Hrs/Rate</u>	<u>Amount</u>
04/22/03	GWH Telephone call to Robert Wickstrom; left extensive message re: student body coffee cart.	0.20 145.00/hr	29.00
	GWH Telephone conference with Robert Wickstrom re: Education Code section 72253 and expenditures of student funds, research and analysis re: same.	4.50 145.00/hr	652.50
04/23/03	GWH Additional research and preparation of lengthy email opinion re: ASSC coffee cart issues.	3.20 145.00/hr	464.00
	GWH Preparation of extensive email correspondence to Robert Wickstrom re: ASSC use of funds.	0.80 145.00/hr	116.00
04/24/03	GWH Telephone conference with Ms. Millie Roberts re: vacation time of retiring classified employees.	0.20 145.00/hr	29.00
	GWH Research and analysis re: whether classified employees can be required to take accumulated vacation time before retiring.	4.10 145.00/hr	594.50
	GWH Email correspondence from Ron Martinez re: introduction to wine course	0.20 145.00/hr	29.00
	GWH Research re: whether District can require prospective retirees to expend accumulated vacation time.	1.10 145.00/hr	159.50
	ALS Initial review of documents regarding contract for MARS project	0.20 145.00/hr	29.00
	ALS Reviewed and discussed revisions to Sierra Community College District opinion letter.	0.50 145.00/hr	72.50
	ALS Telephone conference with Division of labor Standards Enforcement offices regarding ability of employer to require employee to use vacation time before retiring.	0.20 145.00/hr	29.00

		<u>Hrs/Rate</u>	<u>Amount</u>
04/24/03	ALS Research whether a public entity employer can force an employee to take vacation prior to retiring.	1.20 145.00/hr	174.00
	ALS Research California constitution regarding no gifts of public funds.	0.90 145.00/hr	130.50
	ALS Review of case law regarding contracts not ratified by Board of Trustees.	0.20 145.00/hr	29.00
	ALS Preparation of opinion letter regarding Sierra CCD's liability and obligation to pay for services rendered that were not ratified by the board of trustees.	1.10 145.00/hr	159.50
04/25/03	GWH Analysis of Tax Deferred Services contract and preparation of email correspondence to Jenne' Hallam.	0.50 145.00/hr	72.50
	GWH Preparation of email correspondence to Ron Martinez re: Introduction to Wine course.	0.20 145.00/hr	29.00
	GWH Preparation of email correspondence to Doug Smith re: opinion letter re: mandatory vacation for retirees.	0.20 145.00/hr	29.00
04/28/03	GWH Preparation for and attend meeting re: Student Funds at Sierra College, with travel time.	1.80 145.00/hr	261.00
	ALS Attended Sierra CCD meeting	1.70 145.00/hr	NO CHARGE
04/29/03	GWH Review of email correspondence from Millie Roberts re: campus center.	0.20 145.00/hr	29.00
	ALS Initial review of ability to spend student fees to enhance student activities area / center.	0.20 145.00/hr	29.00
04/30/03	GWH Review of email correspondence from Millie Roberts re: use of student fees.	0.20 145.00/hr	29.00

# JOHNSON SCHAUCHTER & LEWIS

A Professional Law Corporation

California Plaza

2180 Harvard Street, Suite 560

Sacramento, CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

PRIVILEGED & CONFIDENTIAL

SIERRA JOINT COMMUNITY COLLEGE

ROBERT WICKSTROM

5000 ROCKLIN RD

ROCKLIN CA 95677

September 08, 2003

Invoice No.20494

In Reference To: Sierra CCD - labor  
Our File No. 00046

## Interim Statement for Professional Services Rendered

	<u>Hrs/Rate</u>	<u>Amount</u>
07/01/03 GWH Telephone call to Dr. Ron Martinez re:retiree benefits settlement document.	0.20 145.00/hr	29.00
07/07/03 GWH Extensive telephone conference with Ron Martinez re: upcoming Board meeting and retiree medical benefits.	0.30 145.00/hr	43.50
GWH Telephone call to Dr. Ron Martinez -- left extensive message re: Board meeting.	0.10 145.00/hr	14.50
07/15/03 GWH Research and analysis re: whether summer exemption from loading applies to special services faculty; effect of past practice and whether it is subject of mandatory bargaining.	2.50 145.00/hr	362.50

For professional services rendered

3.10

\$449.50

Previous balance

\$1,526.58

7/28/2003 Payment - Thank You. Check No. 09066164

(\$131.88)

Total payments and adjustments

(\$131.88)

P.O. #040769

*X [Signature]*  
OK to pay  
pay this amount

Sierra Community College District  
 Collective Bargaining  
 FY 2002-2003  
 Summary of Reimbursable Legal Services  
 John L. Bukey Attorney at Law

Billing Date	Service Date	Component 3			NT Costs
		NP	NT	NC	
8/31/02	8/5	8.00			
	8/14		5.75		
	8/15		4.50		
	8/19		5.00		
	8/22		4.50		
	8/26	3.00			
	8/29		5.00		
10/31/02	10/3		4.50		
	10/7		5.00		
	10/8		4.00		
	10/10	4.00			
	10/14		5.50		
	10/21		5.25		
	10/24		4.00		
	10/28		5.25		
	10/29			3.25	
	10/30		5.00		
11/30/02	11/30		15.25		
	11/30				\$456.25
1/31/03	1/31		22.25		
2/28/03	2/28		40.75		
3/31/03	3/3		6.75		
	3/6		4.25		
	3/10		4.75		
	3/13		4.50		
	3/20		5.50		
	3/24		5.00		
	3/27			5.25	
4/30/03	4/30		14.00		
5/31/03	5/31		33.00	2.00	
5/31	5/31				\$700.20
<b>Total Attorney Hours</b>		<b>15.00</b>	<b>219.25</b>	<b>10.50</b>	<b>\$1,156.45</b>

Total Attorney hours at \$125 p/h = 244.75

KEY

NP	Negotiation Preparation
NT	At-Table Negotiations
NC	Committee Negotiations

## ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
TOTAL GENERAL		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
08/05/02	Joint Labor Management Benefit Committee Facilitation; Necessary Travel	8.00
08/14/02	FUSE Negotiations; Necessary Travel	5.75
08/15/02	FUSE Negotiations, Necessary Travel	4.50
08/19/02	FUSE Negotiations; Necessary Travel	5.00
08/22/02	SCFA Negotiations; Necessary Travel	4.50
08/26/02	Negotiations Planning Meeting; Necessary Travel	3.00
08/29/02	SCFA Negotiations; Post Negotiation Meeting; Necessary Travel	5.00
TOTAL COLLECTIVE BARGAINING		35.75

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
TOTAL EXPENSES		\$0.00



## ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
TOTAL GENERAL		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
10/03/02	SCFA Negotiations; Necessary Travel	4.50
10/07/02	FUSE Negotiations; Necessary Travel	5.00
10/08/02	Board Closed Session Re: Negotiations; Necessary Travel	4.00
10/10/02	Negotiations Planning Meeting — Part-Time Issues; Necessary Travel	4.00
10/14/02	FUSE Negotiations; Necessary Travel	5.50
10/21/02	FUSE Negotiations; Necessary Travel	5.25
10/24/02	SCFA Negotiations; Necessary Travel	4.00
10/28/02	FUSE Negotiations; Necessary Travel	5.25
10/29/02	Meeting Re: Retirees and Active Benefit Issues; Necessary Travel	3.25
10/30/02	SCFA Negotiations; Necessary Travel	5.00
TOTAL COLLECTIVE BARGAINING		45.75

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
TOTAL EXPENSES		\$0.00

## ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
TOTAL GENERAL		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
11/18/02	FUSE Negotiations; Necessary Travel	5.00
11/21/02	SCFA Negotiations; Necessary Travel	4.50
11/25/02	FUSE Negotiations; Post-Negotiations Meeting; Necessary Travel	5.75
TOTAL COLLECTIVE BARGAINING		15.25

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
08/05/02	Travel — 50 Miles @ \$0.365/Mile	\$18.25
08/14/02	Travel — 50 Miles @ \$0.365/Mile	18.25
08/15/02	Travel — 50 Miles @ \$0.365/Mile	18.25
08/19/02	Travel — 50 Miles @ \$0.365/Mile	18.25
08/22/02	Travel — 50 Miles @ \$0.365/Mile	18.25
08/29/02	Travel — 50 Miles @ \$0.365/Mile	18.25
09/05/02	Travel — 50 Miles @ \$0.365/Mile	18.25
09/09/02	Travel — 50 Miles @ \$0.365/Mile	18.25
09/12/02	Travel — 50 Miles @ \$0.365/Mile	18.25
09/16/02	Travel — 50 Miles @ \$0.365/Mile	18.25
09/23/02	Travel — 50 Miles @ \$0.365/Mile	18.25
09/26/02	Travel — 50 Miles @ \$0.365/Mile	18.25
09/30/02	Travel — 50 Miles @ \$0.365/Mile	18.25
10/03/02	Travel — 50 Miles @ \$0.365/Mile	18.25
10/07/02	Travel — 50 Miles @ \$0.365/Mile	18.25
10/10/02	Travel — 50 Miles @ \$0.365/Mile	18.25
10/14/02	Travel — 50 Miles @ \$0.365/Mile	18.25
10/21/02	Travel — 50 Miles @ \$0.365/Mile	18.25
10/24/02	Travel — 50 Miles @ \$0.365/Mile	18.25

10/28/02	Travel — 50 Miles @ \$0.365/Mile	18.25
10/29/02	Travel — 50 Miles @ \$0.365/Mile	18.25
10/31/02	Travel — 50 Miles @ \$0.365/Mile	18.25
11/18/02	Travel — 50 Miles @ \$0.365/Mile	18.25
11/21/02	Travel — 50 Miles @ \$0.365/Mile	18.25
11/25/02	Travel — 50 Miles @ \$0.365/Mile	18.25
<b>TOTAL EXPENSES</b>		<b>\$456.25</b>

# ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		<b>0.00</b>

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	AMOUNT
01/14/03	Attendance at Board Meeting, Closed Session, Grass Valley; Necessary Travel	4.00
01/17/03	FUSE Negotiations; Necessary Travel	8.00
01/23/03	Joint Labor Management Benefit Committee and SCFA Negotiations; Necessary Travel	4.00
01/27/03	Meeting on Fringe Benefit Negotiations; Necessary Travel	2.75
01/30/03	SCFA Negotiations; Necessary Travel	3.50
<b>TOTAL COLLECTIVE BARGAINING</b>		<b>22.25</b>

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL EXPENSES</b>		<b>\$0.00</b>

## ITEMIZATION

**GENERAL:**

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		<b>0.00</b>

**COLLECTIVE BARGAINING:**

DATE	DESCRIPTION	TIME
02/03/03	FUSE Negotiations; Necessary Travel	7.50
02/06/03	SCFA Negotiations; Necessary Travel	3.75
02/10/03	FUSE Negotiations; Necessary Travel	6.50
02/11/03	Attendance at Board Closed Session; Necessary Travel	2.50
02/13/03	SCFA Negotiations; Necessary Travel	3.50
02/20/03	SCFA Negotiations; Necessary Travel	4.50
02/24/03	FUSE Negotiations; Necessary Travel	8.00
02/27/03	Joint Labor-Management Benefit Committee; Necessary Travel	4.50
<b>TOTAL COLLECTIVE BARGAINING</b>		<b>40.75</b>

**EXPENSES:**

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL EXPENSES</b>		<b>\$0.00</b>

# ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
TOTAL GENERAL		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	AMOUNT
03/03/03	FUSE Negotiations; Necessary Travel	6.75
03/06/03	SCFA Negotiations; Necessary Travel	4.25
03/10/03	FUSE Negotiations; Necessary Travel	4.75
03/13/03	SCFA Negotiations; Necessary Travel	4.50
03/20/03	Meeting to Draft Article 21 Language for FUSE; SCFA Negotiations; Necessary Travel	5.50
03/24/03	FUSE Negotiations; Necessary Travel	5.00
03/27/03	Joint Labor Management Benefit Committee; Necessary Travel	5.25
TOTAL COLLECTIVE BARGAINING		36.00

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
TOTAL EXPENSES		\$0.00

# ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
TOTAL GENERAL		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
04/07/03	FUSE Negotiations; Necessary Travel	5.00
04/10/03	SCFA Negotiations; Necessary Travel	4.00
04/21/03	FUSE Negotiations; Necessary Travel	5.00
TOTAL COLLECTIVE BARGAINING		14.00

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
TOTAL EXPENSES		\$0.00

# ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		<b>0.00</b>

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
05/01/03	SCFA Negotiations; Necessary Travel	4.00
05/05/03	FUSE Negotiations; Necessary Travel	5.50
05/08/03	SCFA Negotiations; Necessary Travel	4.00
05/12/03	FUSE Negotiations; Necessary Travel	4.00
05/14/03	Meeting on Campus Re: Health Benefits	2.00
05/15/03	SCFA Negotiations; Necessary Travel	3.00
05/19/03	FUSE Negotiations; Necessary Travel	5.00
05/22/03	SCFA Negotiations; Necessary Travel	3.00
05/29/03	SCFA Negotiations; Necessary Travel	4.50
<b>TOTAL COLLECTIVE BARGAINING</b>		<b>35.00</b>

## EXPENSES:

DATE	DESCRIPTION	TIME
12/02/02	50 Miles @ \$0.36/Mile	\$ 18.00
12/09/02	50 Miles @ \$0.36/Mile	18.00
12/12/02	50 Miles @ \$0.36/Mile	18.00
12/13/02	50 Miles @ \$0.36/Mile	18.00
12/19/02	50 Miles @ \$0.36/Mile	18.00
01/14/03	145 Miles @ \$0.36/Mile	52.20
01/17/03	50 Miles @ \$0.36/Mile	18.00
01/23/03	50 Miles @ \$0.36/Mile	18.00
01/27/03	50 Miles @ \$0.36/Mile	18.00
01/30/03	50 Miles @ \$0.36/Mile	18.00
02/03/03	50 Miles @ \$0.36/Mile	18.00
02/06/03	50 Miles @ \$0.36/Mile	18.00
02/10/03	50 Miles @ \$0.36/Mile	18.00
02/11/03	50 Miles @ \$0.36/Mile	18.00
02/13/03	50 Miles @ \$0.36/Mile	18.00



02/20/03	50 Miles @ \$0.36/Mile	18.00
02/24/03	50 Miles @ \$0.36/Mile	18.00
02/27/03	50 Miles @ \$0.36/Mile	18.00
03/03/03	50 Miles @ \$0.36/Mile	18.00
03/06/03	50 Miles @ \$0.36/Mile	18.00
03/10/03	50 Miles @ \$0.36/Mile	18.00
03/13/03	50 Miles @ \$0.36/Mile	18.00
03/20/03	50 Miles @ \$0.36/Mile	18.00
03/24/03	50 Miles @ \$0.36/Mile	18.00
03/27/03	50 Miles @ \$0.36/Mile	18.00
04/07/03	50 Miles @ \$0.36/Mile	18.00
04/10/03	50 Miles @ \$0.36/Mile	18.00
04/21/03	50 Miles @ \$0.36/Mile	18.00
05/01/03	50 Miles @ \$0.36/Mile	18.00
05/05/03	50 Miles @ \$0.36/Mile	18.00
05/08/03	50 Miles @ \$0.36/Mile	18.00
05/12/03	50 Miles @ \$0.36/Mile	18.00
05/14/03	50 Miles @ \$0.36/Mile	18.00
05/15/03	50 Miles @ \$0.36/Mile	18.00
05/19/03	50 Miles @ \$0.36/Mile	18.00
05/22/03	50 Miles @ \$0.36/Mile	18.00
05/29/03	50 Miles @ \$0.36/Mile	18.00
<b>TOTAL COLLECTIVE BARGAINING</b>		<b>\$ 700.20</b>

Sierra Joint Community College District  
 Collective Bargaining  
 F/Y 2002-2003  
 Schedule 1A  
 At-Table Negotiations - Certificated

Date	Leland, Jeanne	Martinez, Ron	McKnight, Diane	Smith, Doug
8.22.02		1.50		1.50
8.29.02	2.50	2.50		2.50
9.5.02	2.50	2.50		2.50
9.12.02	2.50	2.50		2.50
9.19.02	1.50	1.50		1.50
9.25.02	2.30	2.30	2.30	2.30
9.26.02		2.50		2.50
10.2.02	1.00	1.00	1.00	1.00
10.3.02	2.50	2.50		2.50
10.9.02	1.50	1.50	1.50	1.50
10.24.02	2.00	2.00		2.00
10.31.02	2.50	2.50		2.50
11.21.02	2.50	2.50		1.00
12.5.02	1.00	1.00		
1.23.03	1.50	1.50		0.50
1.30.03	2.50	2.50		1.30
2.6.03	2.50	2.50		2.50
2.13.03	1.50			0.90
3.6.03	2.00	2.00		2.00
3.13.03	1.00	1.00		
3.20.03	2.00	2.00		2.00
4.3.03	2.00	2.00		
4.10.03	2.00	2.00		2.00
<b>Totals</b>	<b>41.30</b>	<b>43.80</b>	<b>4.80</b>	<b>37.00</b>

## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: August 22, 2002  
Time: 2:30 – 4:00 PM  
Location: J7A

1.5

### FOR THE DISTRICT

John Bukey *-attorney*  
Doug Smith  
Ron Martinez

### FOR THE ASSOCIATION

Don Cosper  
Richard Alman (Absent)  
Wayne Barbee  
Luis Sanchez  
Deb Sutphen

**Facilitator** – Deb Sutphen  
Next Facilitator 8/29 - Don Cosper

### **Check-In**

### **Review of May 23, 2002 Recollections**

#### 1. Department Chair Proposal:

Proposal was ratified and implementation in progress.

Who: Ron

What: Convey need to Deans Council that an evaluation and assessment  
Of the Department Chairs needs to occur this Spring

When: ASAP

*Move this item to the Long-term, In-Progress section*

#### 2. Seniority for Part-Time Faculty/Part-Time Evaluation:

Deans Council has been apprised of the following:

- Must resolved current seniority grievances
- Must propose current contract language revisions
- Visit PT evaluation processes and contract provisions
- Explore the SCFA discussion item relative to the implementation of a PT senior status pool with priority assignment rights.

---

The Deans Council will form a work group co-chaired by Michelle Kalina and Diane McKnight to work toward the development of contract language addressing these concerns.

Discussed the need to begin a formal collaborative process to identify issues and interests relative to these matters. Agreed that we would begin with a dedicated work session (8/29) and invite Tina Ludutsky-Taylor who was the lead last year as well as this year's co-chairs to jointly develop interests.

## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: August 29, 2002  
Time: 2:00-4:30 PM  
Location: J7A

2.5

### FOR THE DISTRICT

John Bukey – *attorney*  
Doug Smith  
Ron Martinez  
Jeanne Leland

### FOR THE ASSOCIATION

Don Cospers  
Richard Alman  
Wayne Barbee (absent)  
Luis Sanchez  
Deb Sutphen

**Stakeholders** – Diane McKnight, Michelle Kalina, Tina Ludutsky-Taylor

**Facilitator** – Don Cospers  
Next meeting 9/5/02

### **Check-In**

### **Review of August 22, 2002 Recollections**

#### 1. ISSUES

- Assigning new instructors due to seniority
- Administration of 60% rule
  - FT on leave and assignment of PTs
  - Assignment as it relates to seniority
  - Bumping
  - Mechanics of administration
  - Entitlement based on seniority
- “As Offered” – assignments according to seniority
- PTs role in Department business – professional
- Managers ability to effectively assign classes
  - “Horsetrade”
  - Assign by other standards than seniority (days of the week, other classes)
- Inconsistency of implementation from division to division as it relates to seniority.
- FT bumping rights
  - Ineffective
  - Doesn't feel good

---

- Role of new Dept Chairs and Depts.
- How to effectively evaluate 700+ part-timers (past practices, inconsistency)
- Hiring process for PTs

**NEGOTIATIONS RECOLLECTIONS – FACULTY  
UNAPPROVED**

Date: September 5, 2002  
Time: 2:00-4:30 PM  
Location: J7A

2.5

**FOR THE DISTRICT**

John Bukey\*  
Doug Smith  
Ron Martinez  
Jeanne Leland

**FOR THE ASSOCIATION**

Don Cospers  
Richard Alman  
Wayne Barbee  
Luis Sanchez\*  
Deb Sutphen (absent)

\*- Chief Negotiator

**Stakeholders** – Diane McKnight, Michelle Kalina, Tina Ludutsky-Taylor,  
Jim Weir (2-3:30)

**Facilitator** – Don Cospers

Next meeting 9/12/02, John Bukey, facilitator

**Check-In**

**Review of August 29, 2002 Recollections**

**OPTIONS**

1. 40% load maximum at first pass, with additional assignment of classes at 2<sup>nd</sup> pass. All courses in the department. Beyond 40% offered in seniority order.
2. Status quo
3. Development of a senior part-time status with enhanced privileges and responsibilities (like two tiers).
4. #1 plus no guarantee of a 60% load based on seniority from semester to semester.
5. First 40% following existing protocols. Beyond that is administrator discretion.
6. No seniority.
7. Guarantee 20% and beyond that at the discretion of the administrator.
8. Existing contract language to eliminate bumping ladder.
9. Lottery
10. Increase rigor of hiring and evaluation procedures and live with the risk.
11. Nobody is hired for 2<sup>nd</sup> semester without an evaluation.
12. No seniority until you've been in the District for five years.
13. No seniority without having received an above average evaluation.
14. Failure to evaluate guarantees, 60% load next semester.
15. No seniority for distance learning (TV, on-line).
16. No seniority until you've taught X number of courses. Each section=one.
17. No seniority without breadth courses taught.

## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: September 12, 2002  
Time: 2:00-4:30 PM  
Location: J7A

2.5

### FOR THE DISTRICT

John Bukey\*  
Doug Smith  
Ron Martinez  
Jeanne Leland

### FOR THE ASSOCIATION

Don Cospier  
Richard Alman  
Wayne Barbee  
Luis Sanchez\*  
Deb Sutphen

\*- Chief Negotiator

**Stakeholders** – Diane McKnight, Michelle Kalina, Tina Ludutsky-Taylor,  
Jim Weir (2-3:30)

**Facilitator** – John Bukey

Next meeting 9/19/02, Luis Sanchez, facilitator

### **Check-In**

**Review of September 5, 2002 Recollections**

**Review Confidentiality Check-Out**

### Themes

- Limited number of earned entitlements - seniority
- Entitlements (multiple semester contract)/privileges /responsibilities (department meetings, hiring committees, evaluation, office hours)
- Who manages?
- 60% Issue
  - How to not exceed 60%
  - How to provide job security
  - What counts toward 60% (Striker case)
- Limited number of entitlements – what are the entitlements?
- Present priority of assignment to be maintained (full-time, emeritus, part-time)
- How earned? (Dept. decision, interview, evaluation performance?)
- Special conditions by which you would set aside seniority
- What's do-able (from Board of Trustees through ratification)
- Need for effective evaluation – part-time faculty
- Some Dept. areas need specialized treatment.

### Interests (additional)

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Process that is manageable at the Dean's level (administratively) and support staff.

## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: September 19, 2002  
Time: 3:00-4:30 PM (after JLMC)  
Location: J7A

1.5

### FOR THE DISTRICT

Doug Smith  
Ron Martinez  
Jeanne Leland

### FOR THE ASSOCIATION

Richard Alman  
Wayne Barbee  
Don Cospers  
Luis Sanchez\*  
Deb Sutphen

\*Chief Negotiator

Facilitator – Luis Sanchez

Ron Martinez will facilitate next meeting 9/26/02,

### Regular Agenda Items

- Check-In
  - Review of September 12, 2002 Recollections
1. **Income Formula**  
Begin discussion of the income formula and its intent. Tina Ludutsky-Taylor to participate.
  2. **Part-Time Faculty Issues**  
Workgroup to meet again on 10/3/02 from 2-3:30.
  3. **Sunshine List:**  
List scheduled for 10/8/02 Board of Trustees agenda.
  4. **New Employee Packets:**  
Ron provided Los Rios packet. Discussion included similar packet for Sierra to include Association/Union information. Don suggested Association letter could be written by Joan Merriam. *Ron will pass materials to Staff Development.*
  5. **On-Line Instruction – Assignment Cap.**  
Luis reported he sent Cliff Burns a more specific email regarding on-line faculty evaluation. *Pending response from Cliff.* The seniority component of this item will be deferred to the current part-time faculty discussion.

---

Who: Ron

What: Invite Suzanne Davenport to discuss on-line instruction for 10/24/02.

When: ASAP, *Item pending.*

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **September 25, 2003**  
Time: 2:00-4:15 PM  
Location: J7A

2-3

**FOR THE DISTRICT**

Atty. John Bukey  
Jeanne Leland  
Ron Martinez\* (facilitator)  
Diane McKnight  
Doug Smith

\*Chief Negotiator

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee (left at 3:00)  
Winsome Jackson (3:15)  
Luis Sanchez\*  
Deb Sutphen  
Jim Weir  
Don Cospers

Guest: Keith Weidkamp

- Check-In  
Meeting on 9/18/03 was canceled.

**1. Income Formula**

Doug presented the formula history (01-02), status (02-03), and future estimates (03-04). Today's presentation will be used to develop a list of interests for further discussion. The goal is to resolve the formula within 6 weeks. A subgroup will be formed to identify and define the issues for an interest-based discussion to begin 10/9. Some issues are: efficiency, retiree benefits, STRS, 77%/23%, 1.52% deficit, retiree deferral (Medicare), PT equity – on or off schedule agreement, retiree attrition savings 02-03 – a 3yr. deal to show in the base, step & column part-time deferral, release time, part-time office hours, FTEF obligation/growth 02-03/03-04, retiree bonus deferral, \$540,000, pre-94 fund withdrawals, 02-03 retiree benefits pushed, and STRS creditable comp.

WWW: Winsome, contact Doug to meet and develop subgroup, to report back 10/9

10/16 formula discussion with Los Rios reps Dennis Smith and John Sharp. Our meeting will extend to 5:00. The group discussed putting together an agenda and any other joint interests.

**2. Evaluation of Tenured and Non-Tenured Faculty (pending)**

Ron reported that the District has an interest in requiring faculty to participate in faculty non-tenure evaluation training. Morgan sent a notice to all managers and faculty regarding the two-hour non-tenured evaluation training will be held on October 2, 3, 9. Training will be with the District's legal firm to instruct on contract compliance. This is not mandated training.

WWW: Winsome, send an email of training endorsement, asap



## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: September 26, 2002  
Time: 2:00-4:30 PM  
Location: J7A

25

### FOR THE DISTRICT

Doug Smith  
Ron Martinez (facilitator)  
Jeanne Leland (absent)  
John Bukey\*

### FOR THE ASSOCIATION

Richard Alman  
Wayne Barbee  
Don Cospers  
Luis Sanchez\*  
Deb Sutphen

\*Chief Negotiator  
Facilitator for next meeting – Deb Sutphen

### Regular Agenda Items

- Check-In
- Review of September 19, 2002 Recollections
- 1. **Income Formula**  
Issues: Attrition savings – Full-time obligation, STRS contribution, Part-time office hour calculations, and deferred medical benefit costs.
- 2. **Part-Time Faculty Issues**  
Workgroup to meet again on 10/3/02 from 2-3:30.
- 3. **Sunshine List:**  
List scheduled for 10/8/02 Board of Trustees agenda. *(Item closed)*
- 4. **New Employee Packets:**  
Ron provided Los Rios packet. Discussion included similar packet for Sierra to include Association/Union information. Don suggested Association letter could be written by Joan Merriam. *Ron will pass materials to Staff Development. (Item Closed).*
- 5. **On-Line Instruction – Assignment Cap.**  
Luis reported he sent Cliff Burns a more specific email regarding on-line faculty evaluation. *Pending response from Cliff.* The seniority component of this item will be deferred to the current part-time faculty discussion.

Ron invited Suzanne Davenport for discussion scheduled 10/24/02 at 2:30 P.M.

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **October 2, 2003**  
Time: 2:00-3:00 PM  
Location: J7A

**FOR THE DISTRICT**

John Bukey  
Jeanne Leland  
Ron Martinez\*  
Diane McKnight  
Doug Smith

\*Chief Negotiator

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson (absent)  
Luis Sanchez\* (absent)  
Deb Sutphen  
Jim Weir  
Don Cospers (facilitator)

Guest: Keith Weidkamp

- Check-In (abbreviated, then suspended)

**1. Income Formula**

Doug presented the formula history (01-02), status (02-03), and future estimates (03-04). Today's presentation will be used to develop a list of interests for further discussion. The goal is to resolve the formula within 6 weeks. A subgroup will be formed to identify and define the issues for an interest-based discussion to begin 10/9. Some issues are: efficiency, retiree benefits, STRS, 77%/23%, 1.52% deficit, retiree deferral (Medicare), PT equity – on or off schedule agreement, retiree attrition savings 02-03 – a 3yr. deal to show in the base, step & column part-time deferral, release time, part-time office hours, FTEF obligation/growth 02-03/03-04, retiree bonus deferral, \$540,000, pre-94 fund withdrawals, 02-03 retiree benefits pushed, and STRS creditable comp.

10/16 formula discussion with Los Rios reps Dennis Smith and John Sharp at 3:00. Our meeting may extend to 5:00. The group discussed putting together an agenda and any other joint interests.

On 10/9 we will "T" up the interests regarding the income formula and begin discussion. Doug requests that Winsome be present for discussions related to formula.

**2. Evaluation of Tenured and Non-Tenured Faculty (item closed)**

Ron reported that the District has an interest in requiring faculty to participate in faculty non-tenure evaluation training. Morgan sent a notice to all managers and faculty regarding the two-hour non-tenured evaluation training will be held on October 2, 3, 9. Training will be with the District's legal firm to instruct on contract compliance. This is not mandated training.

WWW: Winsome, send an email of training endorsement, asap

## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: October 3, 2002  
Time: 2:00-4:30 PM  
Location: J7A

25

### FOR THE DISTRICT

Doug Smith  
Ron Martinez  
Jeanne Leland  
John Bukey\*

### FOR THE ASSOCIATION

Richard Alman  
Wayne Barbee  
Don Cosper (absent)  
Luis Sanchez\*  
Deb Sutphen (facilitator)

\*Chief Negotiator  
Guests: Jim Weir  
Facilitator for next meeting – John Bukey

### Regular Agenda Items

- Check-In
  - Review of September 26, 2002 Recollections
1. **Income Formula**  
Issues: Attrition savings – Full-time obligation, STRS contribution, part-time office hour calculations, and deferred medical benefit costs. Discussed the possibility of scheduling a special meeting or scheduling discussion for 10/24/02 regular meeting. Ron, Don, and Doug may meet to discuss prior to the 24<sup>th</sup>.  
(Discussion pending)
  2. **Part-Time Faculty Issues**  
Jim Weir provided handout and invited others to use his calculations to assist in clarifying their interests/options priorities. File on disc with Jeanne.  
Additional Option – Part-time faculty tenure after completion of four years with certain duties and privileges.  
With the absence of Diane, Michelle, and Tina, further discussion of this item will be deferred until 10/31/02 from 2:00-3:30.
  3. **New Employee Packets:**  
Discussion continued regarding content of employee packet. Interest in developing an Association letter of introduction to be included in new employee materials.  
Who: Jeanne  
What: Provide copies of letter from Los Rios packet.  
When: For 10/24/02

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **October 9, 2003**  
Time: 2:00-4:30 PM  
Location: J7A

1-5

**FOR THE DISTRICT**

John Bukey (facilitator)  
Jeanne Leland  
Ron Martinez\*  
Diane McKnight  
Doug Smith

\*Chief Negotiator

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson  
Luis Sanchez\*  
Deb Sutphen  
Jim Weir  
Don Cospier

Guest: Keith Weidkamp

- Check-In

**1. Income Formula (3:00-5:00)**

10/16 formula discussion with Los Rios reps Dennis Smith and John Sharp at 3:00. Today, we "T'd" up the interests regarding the income formula (see Compensation Formula Discussion attachment).

The group reached **consensus** on the following options:

- Immediately develop a list of the items in question and solve them from top to bottom.
- Create a taskforce of District and Union participants to get proposal on the table for next week.
- Defer consideration of the formula in some improved version – resolve 02-03 asap.
- Include clarity on Ohlone bonus – and medical costs.

**2. Classified Instructors (pending)**

Ron handed out a simulation to determine rate of pay for classified employees. This is not a formula-related expense, but comes from District's bucket. SCFA Exec Board will continue to discuss the issue. There are concerns regarding part-time and full-time faculty assignments, the relationship to classified teaching assignments and expectations of assignments. How does this work with Article 28?

**3. Retiree Arbitration (pending)**

Item to remain for updates.

**4. Department Chair**

**Stipend** - Currently Dept. Chairs receive a stipend. Senior faculty want to include it in their annual reportable income towards creditable compensation with STRS. This change would be done for all Dept. Chairs.

## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: October 24, 2002  
Time: 2:00-4:00 PM  
Location: J7A

2.0

### FOR THE DISTRICT

Doug Smith  
Ron Martinez  
Jeanne Leland  
John Bukey\* (facilitator)

### FOR THE ASSOCIATION

Richard Alman  
Wayne Barbee  
Don Cosper  
Luis Sanchez\*  
Deb Sutphen

\*Chief Negotiator

Guest: Suzanne Davenport (2:30)

Facilitator for next meeting – Luis Sanchez and Wayne Barbee

### Regular Agenda Items

- Check-In
- Review of October 3, 2002 Recollections

#### 1. Income Formula

Issues: Attrition savings – Full-time obligation, STRS contribution, part-time office hour calculations, and deferred medical benefit costs. Discussed the possibility of scheduling a special meeting or scheduling discussion for 10/24/02 regular meeting. Ron, Don, and Doug may meet to discuss prior to the 24<sup>th</sup>.  
*(Discussion pending)*

#### 2. Part-Time Faculty Issues

Jim Weir provided handout and invited others to use his calculations to assist in clarifying their interests/options priorities. File on disc with Jeanne.  
Additional Option – Part-time faculty tenure after completion of four years with certain duties and privileges.  
With the absence of Diane, Michelle, and Tina, further discussion of this item will be deferred until 10/31/02 from 2:00-3:30.

#### 3. New Employee Packets:

Discussion continued regarding content of employee packet. Interest in developing an Association letter of introduction to be included in new employee materials.

Who: Jeanne

What: Provide copies of letter from Los Rios packet.

When: For 10/24/02

Jeanne – No letter in packet, called Los Rios to resend.

(continued)

## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: October 31, 2002  
Time: 2:00-4:30 PM  
Location: J7A

2.5

### FOR THE DISTRICT

Doug Smith  
Ron Martinez  
Jeanne Leland  
John Bukey\*

### FOR THE ASSOCIATION

Richard Alman  
Wayne Barbee (2<sup>nd</sup> facilitator)  
Don Cosper  
Luis Sanchez\* (1<sup>st</sup> facilitator)  
Deb Sutphen (absent)

\*Chief Negotiator  
Guest: Jim Weir, Diane McKnight  
Facilitator for next meeting – Don Cosper

### Regular Agenda Items

- Check-In
- Review of October 24, 2002 Recollections

#### 1. Income Formula

Issues: Attrition savings – Full-time obligation, STRS contribution, part-time office hour calculations, and deferred medical benefit costs. Discussed the possibility of scheduling a special meeting or scheduling discussion for 10/24/02 regular meeting. Ron, Don, and Doug may meet to discuss prior to the 24<sup>th</sup>.  
(Discussion pending)

#### 2. Part-Time Faculty Issues

District workgroup proposal presented and compared with Jim's option ranking list. Discussion continued:

1. Notification of PTers by census (or one week after)
2. Threshold: Time, competence, loyalty
  - PT faculty academy
  - HRfac, PTfac, FTfac
3. Evaluation – do-able – whose fault?
  - PTers performing evaluations – legality?
4. Grandfathering?
5. PTers contractually obligated to notify Dean of assignment – load
6. Define FTfac workload
  - Define two types of PT work: Permanent PT & Hrly PT
7. Equity \$/Parity
8. Phase in of items 6&7

(continued)

## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: November 21, 2002  
Time: 2:00-4:30 PM  
Location: J7A

2.5

### FOR THE DISTRICT

1.0 -  
Doug Smith (left 3:00)  
Ron Martinez  
Jeanne Leland  
John Bukey\*

### FOR THE ASSOCIATION

Richard Alman  
Wayne Barbee  
Don Cospers (left ill)  
Luis Sanchez\* (facilitator)  
Deb Sutphen

\*Chief Negotiator

Guest: Michelle Kalina, Diane McKnight

Facilitator for next meeting – Ron Martinez

### Regular Agenda Items

- Check-In
- Review of October 31, 2002 Recollections

#### 1. Income Formula

Discussion scheduled for 12/17, 8:30-12 and if needed, 12/19, 8:30-12.

#### 2. Part-Time Faculty Issues

District workgroup proposal presented and compared with Jim's option ranking list.

Notification of PTers by census (or one week after)

1. Threshold: Time, competence, loyalty  
PT faculty academy  
HRfac, PTfac, FTfac
2. Evaluation – do-able – whose fault?  
PTers performing evaluations – legality?
3. Grandfathering?
4. PTers contractually obligated to notify Dean of assignment – load
5. Define FTfac workload  
Define two types of PT work: Permanent PT & Hrly PT
6. Equity \$/Parity
7. Phase in of items 6&7

New – Notification within 1<sup>st</sup> month of the 1<sup>st</sup> term for the next term or what is the earliest possible notification time?

Discussion continued regarding District Workgroup proposal.

(Continued)

## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: December 5, 2002  
Time: 3:00-4:00 PM  
Location: J7A

1.0

### FOR THE DISTRICT

Doug Smith (absent)  
Ron Martinez (2:30)  
Jeanne Leland  
John Bukey\* (absent)

### FOR THE ASSOCIATION

Richard Alman  
Wayne Barbee  
Don Cosper (facilitator)  
Luis Sanchez\*  
Deb Sutphen

\*Chief Negotiator

Guest: Neal Allbee, Stephanie Guevara, Michelle Kalina, Diane McKnight  
Facilitator for next meeting – Don Cosper

### Regular Agenda Items

- Check-In

The 12/5/02 meeting began with discussion of Non-Tenure Evaluation Forms.

Discussion recollections – see item 11.

Following Item 11, the committee moved to Item 13, and began Parity discussion.

Discussion recollections – see item 13.

New off-agenda item “Conflict of Contract Language”, see Off-Agenda Item 15, for discussion.

Other than these items above, we did not complete review of 11/21/02 recollections.  
Check-Out and meeting ended 4:00 PM.

- Review of November 21, 2002 Recollections

1. Income Formula

Discussion scheduled for 12/17, 8:30-12 and if needed, 12/19, 8:30-12.

2. Part-Time Faculty Issues

District workgroup proposal presented and compared with Jim’s option ranking list.

Notification of PTers by census (or one week after)

1. Threshold: Time, competence, loyalty  
PT faculty academy  
HRfac, PTfac, FTfac
2. Evaluation – do-able – whose fault?  
PTers performing evaluations – legality?
3. Grandfathering?
4. PTers contractually obligated to notify Dean of assignment – load
5. Define FTfac workload  
Define two types of PT work: Permanent PT & Hrly PT
6. Equity \$/Parity
7. Phase in of items 6&7



## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: January 23, 2003  
Time: 2:00-3:30 PM  
Location: J7A

1.5

### FOR THE DISTRICT

0.5 –  
Doug Smith (left at 2:25)  
Ron Martinez  
Jeanne Leland  
John Bukey\* (facilitator)

### FOR THE ASSOCIATION

Richard Alman  
Wayne Barbee  
Don Cospers  
Luis Sanchez\*  
Deb Sutphen

\*Chief Negotiator

Guests: Jim Weir, Diane McKnight

- Check-In
- Revision of agenda priorities:
  - #1 – Department Chair article – current article ends 6/30/03.
  - #2 – Retirement incentive program
    - W: Ron
    - W: Contact STRS-District buy out, STRS early outs
    - W: For next meeting
  - #3 – Part-time faculty system – two tier system, coordinator, stipends
  - #4 – Income formula – scenario availability estimated at 3 weeks away.

- Review of December 19, 2002 Recollections

1. Income Formula  
(Discussion pending)

2. Part-Time Article  
Parity definition approved by side letter SCFA 02-10. See item 2(b).  
Several part-time issues on the agenda. Currently funding is uncertain, the group will continue to discuss issues, develop processes and language, and set priorities for future funding.

2(a) Assignment and Seniority (Part-Time Faculty Issues)

District workgroup proposal presented and compared with Jim's option ranking list. Notification of PTers by census (or one week after)

1. Threshold: Time, competence, loyalty  
PT faculty academy  
HRfac, PTfac, FTfac
2. Evaluation – do-able – whose fault?  
PTers performing evaluations – legality?
3. Grandfathering?
4. PTers contractually obligated to notify Dean of assignment – load

## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: January 30, 2003  
Time: 2:00-4:30 PM  
Location: J7A

2.5

### FOR THE DISTRICT

1.3° – Doug Smith (left at 3:15)  
Ron Martinez  
Jeanne Leland  
John Bukey\*

### FOR THE ASSOCIATION

Richard Alman  
Wayne Barbee  
Don Cospier  
Luis Sanchez\* (facilitator)  
Deb Sutphen

\*Chief Negotiator  
Guests: Jim Weir

- Check-In
- Review of January 23, 2003 Recollections

#### 1. Department Chair Article

Current article/side letter agreement 01-11 (pg.230) ends 6/30/03. Consensus proposal to extend article for one more year. Poll Deans, Faculty, and Dept. Chairs to discover what is working and what isn't, interests, and amendments. Discussion regarding inclusion of part-time faculty and developing language to invite, not require, participation.

W: Ron

W: Poll the Deans regarding proposal.

W: By Feb 20, 2003 meeting

W: Don

W: Poll Faculty and Dept. Chairs regarding proposal

W: By Feb. 20, 2003 meeting

#### 2. Retirement Incentive Program

District and SCFA presented their proposals. Discussion regarding various scenarios and situations: waiver of FT/PT ratio (if waiver granted-how many years?), longevity, suspension of formula, STRS service credit, two year incentive - 3<sup>rd</sup> year revisit. Doug will calculate potential savings for Board meeting presentation on 2/11/03.

Conditions needed to be in place:

1. For two years forego any salary improvements, current bucket suspended - \$30, 000 attrition savings redirected to District for two years.
  2. Waiver/forgiveness that works
  3. Incentive offered to FUSE and Management. Backfills suspended
- Goal – Savings to the District

## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: February 6, 2003  
Time: 2:00-4:30 PM  
Location: J7A

2.5

### FOR THE DISTRICT

Doug Smith  
Ron Martinez (facilitator)  
Jeanne Leland  
John Bukey\*

### FOR THE ASSOCIATION

Richard Alman  
Wayne Barbee  
Don Cospers (absent)  
Luis Sanchez\*  
Deb Sutphen

\*Chief Negotiator

Guests: Jim Weir, Tina Ludutsky-Taylor, Diane McKnight

- Check-In
- Review of January 30, 2003 Recollections

#### 1. Department Chair Article

Current article/side letter agreement 01-11 (pg.230) ends 6/30/03. Consensus proposal to extend article for one more year. Poll Deans, Faculty, and Dept. Chairs to discover what is working and what isn't, interests, and amendments. Discussion regarding inclusion of part-time faculty and developing language to invite, not require, participation.

2/6/03 - Ron reported that Morgan will be sharing a revised draft of the Dept. Chair provision from May 02. Also, Ron and Don have been invited to the Dept. Chair meeting on 2/24 and will poll then.

W: Don

W: Poll Faculty and Dept. Chairs regarding proposal

W: After 2/24/03

#### 2. Retirement Incentive Program

District and SCFA presented their proposals. Discussion regarding various scenarios and situations: waiver of FT/PT ratio (if waiver granted-how many years?), longevity, suspension of formula, STRS service credit, two year incentive - 3<sup>rd</sup> year revisit. Doug will calculate potential savings for Board meeting presentation on 2/11/03.

Conditions needed to be in place:

1. For two years forego any salary improvements, current bucket suspended - \$30,000 attrition savings redirected to District for two years.
  2. Waiver/forgiveness that works
  3. Incentive offered to FUSE and Management. Backfills suspended
- Goal – Savings to the District

## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: February 13, 2003  
Time: 2:00-3:30 PM  
Location: J7A

1.5

### FOR THE DISTRICT

Doug Smith (left 2:50)  
Ron Martinez (absent)  
Jeanne Leland  
John Bukey\* (facilitator)

### FOR THE ASSOCIATION

Richard Alman  
Wayne Barbee  
Don Cospers (left 2:50)  
Luis Sanchez\*  
Deb Sutphen (absent)

\*Chief Negotiator

Guests: Jim Weir, Neal Allbee, Stephanie Guevara

- Check-In
- Review of February 6, 2003 Recollections

#### 1. Department Chair Article

Current article/side letter agreement 01-11 (pg.230) ends 6/30/03. Consensus proposal to extend article for one more year. Poll Deans, Faculty, and Dept. Chairs to discover what is working and what isn't, interests, and amendments. Discussion regarding inclusion of part-time faculty and developing language to invite, not require, participation. Suggestion to have Dept. Chairs meet with part-time faculty. Ron reported that Morgan will be sharing a revised draft of the Dept. Chair provision from May 02. Also, Ron and Don have been invited to the Dept. Chair meeting on 2/24 and will poll then.

W: Don

W: Poll Faculty and Dept. Chairs regarding proposal

W: After 2/24/03

#### 2. Retirement Incentive Program

District and SCFA presented their proposals. Discussion regarding various scenarios and situations: waiver of FT/PT ratio (if waiver granted-how many years?), longevity, suspension of formula, STRS service credit, two year incentive - 3<sup>rd</sup> year revisit. Doug will calculate potential savings for Board meeting presentation on 2/11/03. Discussion regarding waiver approval lies with the Board of Governors and there is system-wide interest in a waiver.

Conditions needed to be in place:

1. For two years forego any salary improvements, current bucket suspended - \$30,000 attrition savings redirected to District for two years.
  2. Waiver/forgiveness that works – critical it is for at least 2 years.
  3. Incentive offered to FUSE and Management. Backfills suspended
- Goal – Savings to the District

## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: March 6, 2003  
Time: 2:00-4:00 PM  
Location: J7A

2.0

### FOR THE DISTRICT

Doug Smith  
Ron Martinez (facilitator)  
Jeanne Leland  
John Bukey\*

### FOR THE ASSOCIATION

Richard Alman  
Wayne Barbee  
Don Cospers  
Luis Sanchez\*  
Deb Sutphen

\*Chief Negotiator

Guests: Jim Weir, Diane McKnight, Tina Ludutsky-Taylor

- Check-In
- Review of February 27, 2003 Recollections

#### 1. Department Chair Article

Current article/side letter agreement 01-11 (pg.230) ends 6/30/03. Consensus proposal to extend article for one more year. Poll Deans, Faculty, and Dept. Chairs to discover what is working and what isn't, interests, and amendments. Discussion regarding inclusion of part-time faculty and developing language to invite, not require, participation. Suggestion to have Dept. Chairs meet with part-time faculty. Ron reported that Morgan will be sharing a revised draft of the Dept. Chair provision from May 02. Dept. Chair meetings to be held on 2/24 and 2/27.

3/6/03 – Don attended the Dept. Chair meeting(s) and reported the Dept. Chairs interest are more flexibility. They are not interested in release time, supervising classified staff, evaluations, or collegial complaints. Don wants to craft language for those undergoing curriculum review. Due to the increased workload for curriculum review, Chairs may need release time and/or administrative assistant assistance. Don stated District should pay for proposed poll.

W: Don

W: Poll Faculty and Dept. Chairs regarding proposal

W: For 3/6/03

#### 2. Retirement Incentive Program

District and SCFA presented their proposals. Discussion regarding various scenarios and situations: waiver of FT/PT ratio (if waiver granted-how many years?), longevity, suspension of formula, STRS service credit, two year incentive - 3<sup>rd</sup> year revisit. Discussion regarding waiver approval lies with the Board of Governors and there is system-wide interest in a waiver.

Conditions needed to be in place:

## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: March 13, 2003  
Time: 2:00-3:00 PM  
Location: J7A

1.0

### FOR THE DISTRICT

Doug Smith (absent)  
Ron Martinez  
Jeanne Leland  
John Bukey\*

### FOR THE ASSOCIATION

Richard Alman  
Wayne Barbee  
Don Cospier  
Luis Sanchez\* (facilitator)  
Deb Sutphen  
Jim Weir

\*Chief Negotiator

Guests: Diane McKnight, Stephanie Guevara

- Check-In

3/13/03 - Today the group agreed to begin with Evaluations and Part-Time faculty issues. Updates on these discussions are found in items 7 and 3 respectively. Discussions concluded with item 2 Retiree Incentive. Recollections from 3/3/03 have not yet been reviewed by the group.

#### 1. Department Chair Article

Current article/side letter agreement 01-11 (pg.230) ends 6/30/03. Consensus proposal to extend article for one more year. Poll Deans, Faculty, and Dept. Chairs to discover what is working and what isn't, interests, and amendments. Discussion regarding inclusion of part-time faculty and developing language to invite, not require, participation. Suggestion to have Dept. Chairs meet with part-time faculty. Ron reported that Morgan will be sharing a revised draft of the Dept. Chair provision from May 02. Dept. Chair meetings to be held on 2/24 and 2/27.

3/6/03 – Don attended the Dept. Chair meeting(s) and reported the Dept. Chairs interest are more flexibility. They are not interested in release time, supervising classified staff, evaluations, or collegial complaints. Don wants to craft language for those undergoing curriculum review. Due to the increased workload for curriculum review, Chairs may need release time and/or administrative assistant assistance. Don stated District should pay for proposed poll.

W: Don

W: Poll Faculty and Dept. Chairs regarding proposal

W: For 3/6/03

#### 2. Retirement Incentive Program

District and SCFA presented their proposals. Discussion regarding various scenarios and situations: waiver of FT/PT ratio (if waiver granted-how many years?), longevity, suspension of formula, STRS service credit, two year incentive

## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: March 20, 2003  
Time: 2:00-4:00 PM  
Location: J7A

2.0

### FOR THE DISTRICT

Doug Smith  
Ron Martinez  
Jeanne Leland  
John Bukey\*(facilitator)

### FOR THE ASSOCIATION

Richard Alman  
Wayne Barbee  
Don Cosper  
Luis Sanchez\*  
Deb Sutphen (absent)  
Jim Weir

\*Chief Negotiator

Guests: Diane McKnight

- Check-In
- Review of Recollections 3/13/03)

#### 1. Department Chair Article

Current article/side letter agreement 01-11 (pg.230) ends 6/30/03. Consensus proposal to extend article for one more year. Poll Deans, Faculty, and Dept. Chairs to discover what is working and what isn't, interests, and amendments. Discussion regarding inclusion of part-time faculty and developing language to invite, not require, participation. Suggestion to have Dept. Chairs meet with part-time faculty. Ron reported that Morgan will be sharing a revised draft of the Dept. Chair provision from May 02. Dept. Chair meetings to be held on 2/24 and 2/27.

3/6/03 – Don attended the Dept. Chair meeting(s) and reported the Dept. Chairs interest are more flexibility. They are not interested in release time, supervising classified staff, evaluations, or collegial complaints. Don wants to craft language for those undergoing curriculum review. Due to the increased workload for curriculum review, Chairs may need release time and/or administrative assistant assistance. Don stated District should pay for proposed poll.

3/20/03 – Don reported the poll is in draft form to be reviewed by the SCFA E-board and once approved, it will be mailed out.

W: Don

W: Poll Faculty and Dept. Chairs regarding proposal

W: For 3/6/03

#### 2. Retirement Incentive Program

District and SCFA presented their proposals. Discussion regarding various scenarios and situations: waiver of FT/PT ratio (if waiver granted-how many years?), longevity, suspension of formula, STRS service credit, two year incentive

## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: April 3, 2003  
Time: 2:00-4:00 PM  
Location: J7A

2.0

### FOR THE DISTRICT

Doug Smith (absent)  
Ron Martinez  
Jeanne Leland  
John Bukey\*(absent)

### FOR THE ASSOCIATION

Richard Alman (absent)  
Wayne Barbee  
Don Cospers (absent)  
Luis Sanchez\* (facilitator)  
Deb Sutphen  
Jim Weir

\*Chief Negotiator

Guests: Suzanne Davenport, Barbara Battenberg, Mandy Davies

- Check-In
- Review of Recollections – 3/20/03

Today's meeting began with On-Line Instruction, then Calendar Committee, followed by review of the recollections of 3/20/03.

#### 1. Department Chair Article

Current article/side letter agreement 01-11 (pg.230) ends 6/30/03. Consensus proposal to extend article for one more year. Poll Deans, Faculty, and Dept. Chairs to discover what is working and what isn't, interests, and amendments. Discussion regarding inclusion of part-time faculty and developing language to invite, not require, participation. Suggestion to have Dept. Chairs meet with part-time faculty. Ron reported that Morgan will be sharing a revised draft of the Dept. Chair provision from May 02. Dept. Chair meetings to be held on 2/24 and 2/27. Don attended the Dept. Chair meeting(s) and reported the Dept. Chairs interest are more flexibility. They are not interested in release time, supervising classified staff, evaluations, or collegial complaints. Don wants to craft language for those undergoing curriculum review. Due to the increased workload for curriculum review, Chairs may need release time and/or administrative assistant assistance. Don stated District should pay for proposed poll.

3/20/03 – Don reported the poll is in draft form to be reviewed by the SCFA E-board and once approved, it will be mailed out.

W: Don

W: Poll Faculty and Dept. Chairs regarding proposal

W: For 3/6/03 (pending)

#### 2. Retirement Incentive Program

District and SCFA presented their proposals. Discussion regarding various scenarios and situations: waiver of FT/PT ratio (if waiver granted-how many years?), longevity, suspension of formula, STRS service credit, two year incentive



## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: April 10, 2003  
Time: 2:00-4:00 PM  
Location: J7A

2.0

### FOR THE DISTRICT

Doug Smith  
Ron Martinez  
Jeanne Leland  
John Bukey\*

### FOR THE ASSOCIATION

Richard Alman (facilitator)  
Wayne Barbee  
Don Cosper  
Luis Sanchez\*  
Deb Sutphen (absent)  
Jim Weir

\*Chief Negotiator

- Check-In
- Review of Recollections – 4/03/03

#### 1. Department Chair Article

Current article/side letter agreement 01-11 (pg.230) ends 6/30/03. Consensus proposal to extend article for one more year. Poll Deans, Faculty, and Dept. Chairs to discover what is working and what isn't, interests, and amendments. Discussion regarding inclusion of part-time faculty and developing language to invite, not require, participation. Suggestion to have Dept. Chairs meet with part-time faculty. Ron reported that Morgan will be sharing a revised draft of the Dept. Chair provision from May 02. Dept. Chair meetings to be held on 2/24 and 2/27. Don attended the Dept. Chair meeting(s) and reported the Dept. Chairs interest are more flexibility. They are not interested in release time, supervising classified staff, evaluations, or collegial complaints. Don wants to craft language for those undergoing curriculum review. Due to the increased workload for curriculum review, Chairs may need release time and/or administrative assistant assistance. Don stated District should pay for proposed poll.

3/20/03 – Don reported the poll is in draft form to be reviewed by the SCFA E-board and once approved, it will be mailed out.

4/10/03 – Don reported that the poll is completed and he will be sending out through Craig Kelly pending Morgan Lynn's review.

#### 2. Retirement Incentive Program

District and SCFA presented their proposals. Discussion regarding various scenarios and situations: waiver of FT/PT ratio (if waiver granted-how many years?), longevity, suspension of formula, STRS service credit, two year incentive - 3<sup>rd</sup> year revisit. Discussion regarding waiver approval lies with the Board of Governors and there is system-wide interest in a waiver.

Conditions needed to be in place:

Sierra Joint Community College District  
 Collective Bargaining  
 F/Y 2002-2003  
 Schedule 1B  
 At-Table Negotiations - Classified

Date	Epting-Davis, Carla	Leland, Jeanne	Martinez, Ron	Smith, Doug
8.14.02	3.50		3.50	3.50
8.15.02	3.50		3.50	3.50
8.19.02	3.50		3.50	3.50
9.9.02		3.50	3.50	
9.17.02			2.50	2.50
9.23.02			3.50	3.50
9.30.02		3.50	3.50	3.50
10.14.02		3.50	3.50	3.50
10.21.02		3.50	3.50	3.50
10.28.02		3.50	3.50	3.50
11.18.02		3.50	3.50	1.50
11.25.02		3.20	3.20	
12.2.02		3.50	3.50	3.50
12.9.02		2.50	2.50	2.50
1.17.03		7.00	7.00	7.00
2.3.03		7.00	7.00	7.00
2.10.03		6.00	6.00	6.00
3.3.03		6.00	6.00	6.00
3.10.03		4.00	4.00	4.00
3.24.03		7.00	7.00	7.00
4.7.03		5.00	5.00	5.00
4.21.03		3.50		3.50
5.1.03		2.00	2.00	2.00
5.5.03		5.50	5.50	5.50
5.12.03		3.00	3.00	3.00
5.19.03		6.00	6.00	
6.3.03		2.50	2.50	2.50
<b>Totals</b>	<b>10.50</b>	<b>94.70</b>	<b>107.70</b>	<b>96.50</b>

## COLLABORATIVE BARGAINING RECOLLECTIONS – CLASSIFIED

Date: August 14, 2002

Time: 1:30-5:00

Place: LRC 313 3.5

### FOR THE DISTRICT

John Bukey

Carla Epting-Davis

Ron Martinez

Doug Smith (facilitator)

### FOR THE UNION

Sandra Anderson

Jory Hadsell

Pat Hallahan

Tim Kyle

Visitors: Vance Jacobson, Classification Consultant; Jeanne Leland (for Classification Study only)

1. Tentative Agenda:

Check-In: No elephants

Classification/Conversion Update

Review of Recollections 5/13/02 and 6/10/02

Off-Agenda

Future Dates

2. Classification/Conversion Update

Reviewed status report: Board Approved Classified Positions: 8/13/02

Discussed the NCC Custodian position. Concern that the approved Custodian I position is not the position requested.

W – Doug, Ron

W – Discuss with Provost. Return to table with recommendation.

W – ASAP

Consensus

Vacancies and new positions: Whenever possible the conversion process should occur at time of vacancy. Each decision will include a “check-in” at the table. Ron and Jory to confer and report back on all

3. Training of the Negotiations Team

Training for purpose of validation

**COLLABORATIVE BARGAINING RECOLLECTIONS – CLASSIFIED**

**Date: August 15, 2002**

**Time: 1:30-5:00**

**Place: LRC 313**

8/5

**FOR THE DISTRICT**

John Bukey

Carla Epting-Davis

Ron Martinez

Doug Smith (co-facilitator)

**FOR THE UNION**

Sandra Anderson (facilitator)

Jory Hadsell

Pat Hallahan

Tim Kyle

Visitors: Vance Jacobson, Classification Consultant; Jeanne Leland, recorder

Check-In: No elephants

**1. Job Analysis Process**

Vance presented the Job Analysis Process, provided handouts and conversion schedule. He will provide committee with Job Analysis training. Vance will set fixed days to be on-campus. Schedule shows one of the five groups every other month to be reviewed. Only those positions identified on the Sierra College Job Alignment and Conversion Process chart will be reviewed. Job Analysis Process presentation is available in PowerPoint for campus-wide communication.

Successful conversion requires good communication and clearly defined process for appeals. This needs to be revisited and defined. Vance suggests Appeals committee would be a smaller group who would make recommendations and return those recommendations to the table. Appeal time is to be limited. Employee may bring one guest from campus community only (includes union rep.).

New/reorganization positions will be reviewed throughout the conversion process, as needed. Review process will require a completed Job Description Worksheet (JDW). Managers/supervisor will complete JDW for vacant positions.

A preface statement will be included in job descriptions for “cluster” positions to enable assignment within the list of job duties based on proficiency and ability. “Cluster” positions – multiple employees working in same job title.

(continued)

**COLLABORATIVE BARGAINING RECOLLECTIONS – CLASSIFIED**

**Date:** August 19, 2002

**Time:** 1:30-5:00

**Place:** LRC 313

3.5

**FOR THE DISTRICT**

John Bukey

Carla Epting-Davis

Ron Martinez (facilitator)

Doug Smith

**FOR THE UNION**

Sandra Anderson

Jory Hadsell (absent)

Pat Hallahan

Tim Kyle

Visitors: Jeanne Leland, recorder, non-voting

Check-In: No elephants

**1. Personnel Items**

Custodian Replacement (McKenzie) - Promotion of Delores McKenzie from Custodian to Admission & Records Technician II. Discussion ensued regarding the need to replace the position. FUSE is supportive of a replacement

Custodian Replacement (Hernandez) – Discover the status of Custodian replacement position resulting from the promotion of Maria Hernandez from Custodian to Instructional Assistant-ESL.

W - Jeanne

W- Research Custodian replacement status and report back

W – 9/9/02

Limited Short-Term

Process Clarification – Full-Time classified employees may back fill/vacancy replace for LST unit positions.

**2. Review of Recollections**

8/14/02 - approved

8/15/02 - Add to Item #2 Education requirements – Educational requirement will be added to job announcement if determined to be necessary.

**3. Childcare Centers**

Darlene Jackson, Associate Dean-Child Development Centers, described the history of the Early Childhood Education program and its relationship with Head Start, PCAC, PCOE, Grass Valley School District, and Sierra College. Issue of the State of California, Department of Social Services requiring the Business Office must be located in the County of childcare facility. This

(Continued)

**COLLABORATIVE BARGAINING RECOLLECTIONS – CLASSIFIED**

Date: September 9, 2002

Time: 1:30-5:00

Place: LRC 313

3.5

**FOR THE DISTRICT**

John Bukey

Ron Martinez (absent)

Doug Smith (absent)

Jeanne Leland

**FOR THE UNION**

Sandra Anderson

Jory Hadsell (facilitator)

Pat Hallahan

Tim Kyle

Check-In:

Review of Recollections from 8/19/02

Addition needed on item #4. Jeanne will revise and resubmit. FUSE was unaware of District team membership change and requested to be informed of any future changes and visitors.

1. **Personnel Items**

Custodian Replacements (D.McKenzie, M.Hernandez, R.VanZandt)

Currently there are three vacant custodian positions.

W - Ron

W - Find out what is manager's intent regarding filling these positions.

W - For next meeting 9/23/02.

Jeanne distributed Board of Trustees **Personnel Items** scheduled for the 9/10/02 agenda.

2. **Childcare Centers**

Copies of materials provided by Darlene Jackson were distributed.

3. **Conversion- Workgroup**

Committee agreed to form a Conversion Workgroup. Workgroup will work on issues regarding communication, training, scheduling, and implementation.

W - Jeanne

W - Schedule and prepare items for conversion workgroup (1 hr. on Wed. 9/18, time tba)

W - ASAP

**Off Agenda Items**

4. **NCC Custodian**

Provost accepted Custodian I position. *Item closed.*

**DISTRICT/FUSE RECOLLECTIONS**  
**Confidential**

**Date:** September 17, 2003

**Time:** 1:30-4:00 PM

**Place:** Fireside Room

2.5

**FOR THE DISTRICT**

John Bukey (facilitator)

Ron Martinez\*

Doug Smith

Jeanne Leland (absent)

**FOR THE UNION**

Shari Newman\*

Tim Kyle

Jory Hadsell

Bernard Acuna

\*Chief Negotiator

Check-In (Doug received his glasses)

**1. Post-94 Update**

A JLMC meeting is scheduled for 9/18/03 with the trust attorney, Shana Saichuck, by conference call, to assist to resolve pending issues regarding the trust.

WWW: Jeanne, email meeting location, tonight

**2. Status of JLMC (pending)**

Pre-94 fund withdrawals will commence effective July 1, 2003. A draft memo from JLMC to Pre-94 actives and retirees will be prepared. JLMC retiree reps will prepare a cover memo for the Pre-94 retirees.

Pending: Memos for Pre-94 actives and retirees

Pending: Identify Post-94 trustees.

Pending: Opting out SCCP

**3. Transportation & Bus Drivers (pending)**

Began SCCP format to identify interests and issues.

WWW: Jeanne, locate old job descriptions for bus drivers, for next meeting

**4. Formula Status**

Review proposed draft handout. Consensus reached to prepare proposal for tentative agreement.

**5. Returning Retirees (item closed)**

**6. Classified PAR Participation (item closed)**

**7. Temporary Employees (pending)**

Discussion continued regarding the use of temps, Ed Code 88003 and AB500.

Temp employee request must specify the employment start and end date on the Board of Trustees personnel item agenda. Currently the group is discussing the

**COLLABORATIVE BARGAINING RECOLLECTIONS – CLASSIFIED**

**Date:** September 23, 2002  
**Time:** 1:30 – 5:00  
**Place:** LRC 313

3.5

**FOR THE DISTRICT**

Doug Smith  
Jeanne Leland (absent)  
John Bukey (Facilitator)  
Ron Martinez

**FOR THE UNION**

Sandra Anderson  
Jory Hadsell  
Tim Kyle  
Pat Hallahan

Guests: Ray Cunningham, Bill Rogers (1:30 – 2:15)  
Next week (9/30) facilitator: Sandra Anderson

Check-In:

**Review of Recollections from 9/9/02**

1. **Personnel Items**

**Custodian Replacements:** (Cunningham, Rogers present for this discussion item):

The status of the vacant custodial positions:

<u>Name</u>	<u>Year Vacant</u>	<u>Cause</u>	<u>Status</u>
A. Lloyd	00 – 01	Retirement	FTE to Energy
B. VanZandt	01 – 02	Retirement	Vacant
M. Hernandez	02 – 03	Transfer ESL	Vacant
D. Mckenzie	02 – 03	Transfer A&R	Vacant
D. Baskett	02 – 03	Transfer NCC	Vacant

The District intent is to initiate the process immediately to replace the VanZandt, Hernandez and McKenzie positions. The District will return to the table within 30 days to report on the ongoing District workload analysis of custodial assignments and will provide a recommendation regarding the disposition of the Baskett position which will become vacant on 9/30/03. The District will advertise the 3 vacant positions with the intended shift change for hours and workweek schedule.

There was additional discussion regarding the use of Temporary Employees in Custodial and Transportation areas. This matter appears within the FUSE interests on their Sunshine List.

2. **Childcare Centers:**

P.E.R.B. Informal Conference is scheduled: October 7, 2002.



COLLABORATIVE BARGAINING RECOLLECTIONS – CLASSIFIED

Date: September 30, 2002  
Time: 1:30 – 5:00  
Place: LRC 313

35

FOR THE DISTRICT

Doug Smith  
Jeanne Leland  
John Bukey\*  
Ron Martinez

FOR THE UNION

Sandra Anderson (facilitator)  
Jory Hadsell  
Tim Kyle  
Pat Hallahan\*

\*Chief negotiator  
Facilitator for next week (10/7/02): Doug Smith

• **Check-In:**

• Review of Recollections from 9/23/02

• Review of Board of Trustees Personnel Items for 10/8/02 Agenda

1. Personnel Items

Request to commence search to replace three Custodian I positions (VanZandt, Hernandez, McKenzie) is on the 10/8/02 Board of Trustees agenda to approve. NCC advertised In-Position for a Custodian I position. Dana Baskett, Custodian at Rocklin campus transferred NCC. He is keeping his current job title and range (14). Rocklin campus will need to replace Dana with a Custodian I position. He is not required to begin another probationary period. *(Item closed)*

2. Childcare Centers:

P.E.R.B. Informal Conference is scheduled: October 7, 2002. *(Item pending)*

3. Conversion Workgroup

The workgroup met with Vance Jacobson on 9/18. Joint communiqué distributed as hard copy to all classified staff and management. Tim Kyle will sit in on the Technology group interviews. Conversion Training with Vance needs to be scheduled. This item to remain on the agenda as Conversion Update.

4. Bookstore Course Pak

Doug reported that the ad hoc committee met and identified a consensus proposal to include timely work, copyright compliance, and cost containment. Committee is researching vendors for copyright compliance services. Next meeting on 10/9/02.

Who: Doug

What: Ad hoc committee report

When: Report back after ad hoc committee's next meeting

**COLLABORATIVE BARGAINING RECOLLECTIONS - CLASSIFIED**

**Date:** October 14, 2002  
**Time:** 1:30-5:00  
**Place:** LRC 313

3.5

**FOR THE DISTRICT**

John Bukey\*  
Ron Martinez  
Doug Smith  
Jeanne Leland

**FOR THE UNION**

Sandy Anderson  
Jory Hadsell  
Pat Hallahan\* (absent)  
Tim Kyle (resigned)

\*Chief Negotiator

Facilitator for next week (10/21/02): Jory Hadsell

- **Check In:** Jory and Sandy reported that Tim Kyle resigned from the Negotiating Team.
- **Review of Recollection from 9/30/02**

**1. Personnel Items:**

Three Custodian I positions will begin the hiring process with a 5-day In-Range notice to staff. If no suitable candidates are selected, the open recruitment process will continue.  
(Item closed)

**2. Childcare Centers**

PERB hearing scheduled for 2/18-20/02. (Item pending)

**3. Conversion Update**

Vance Jacobson began conversion interviews. Last week he met with 15 employees in the first group (technology). Tim and Sandy sat in on interviews and Sandy reported they are going well. Interviews will continue 10/29-31/02. These interviews should conclude the technology group interviews. (Item to remain on agenda as an update)

**4. Bookstore Course Paks**

Doug reported the ad hoc committee (sub committee of Faculty Senate) met on 10/9/02. Committee is developing a form for faculty to sign stating their course paks do not contain materials to cause copyright infringement. If there is a copyright issue, the course pak will go to the ad hoc committee to read and forward to Xenadu (copyright compliance and printing vendor). There is concern that Xenadu provides the copyright service but also requires printing the course pak and the cost of printing is then passed on to students. The committee and Barnes & Noble are looking into local/internet vendors to provide copyright compliance service only and printing work would remain with

(continued)

**COLLABORATIVE BARGAINING RECOLLECTIONS - CLASSIFIED**

Date: October 21, 2002

Time: 1:30-5:00

Place: LRC 313

35

**FOR THE DISTRICT**

John Bukey\*

Ron Martinez

Doug Smith

Jeanne Leland

**FOR THE UNION**

Sandy Anderson

Jory Hadsell

Pat Hallahan\*

Guest: Robert Wickstrom (2-2:30)

\*Chief Negotiator

Facilitator for next week (10/28/02): Jory Hadsell

- **Check In:** Doug reported the PERS employer rates are increasing.
- **Review of Recollection** from 10/21/02

**1. Childcare Centers**

PERB hearing scheduled for 2/18-20/03. *(Item pending)*

**2. Conversion Update**

Interviews will continue 10/29-31/02. These interviews should conclude the technology group #1 interviews. *(Item to remain on agenda as an update)*

**3. Bookstore Course Paks**

Doug reported the ad hoc committee (sub committee of Faculty Senate) met on 10/9/02. Committee is developing a form for faculty to sign stating their course paks do not contain materials to cause copyright infringement. If there is a copyright issue, the course pak will go to the ad hoc committee to read and forward to Xenadu (copyright compliance and printing vendor). There is concern that Xenadu provides the copyright service but also requires printing the course pak and the cost of printing is then passed on to students. The committee and Barnes & Noble are looking into local/internet vendors to provide copyright compliance service only and printing work would remain with District printshop. Robert Wickstrom and Doug will meet with attorney George Holt to discuss copyright liability exposure. Next committee meeting is 10/23/02. George will attend the meeting.

Who: Doug

What: Report back to table

When: After 10/23/02 meeting

(continued)

**COLLABORATIVE BARGAINING RECOLLECTIONS - CLASSIFIED**

**Date:** October 28, 2002

**Time:** 1:30-5:00

**Place:** LRC 313

3.5

**FOR THE DISTRICT**

John Bukey\*

Ron Martinez

Doug Smith

Jeanne Leland

**FOR THE UNION**

Sandy Anderson

Jory Hadsell

Pat Hallahan\*

Guest: Vance Jacobson (2:15-5:00)

\*Chief Negotiator

Facilitator for next time (11/19/02):

- **Check In:**
- **Review of Recollections - 10/21/02**

Negotiations began by picking up the agenda items missed at last weeks meeting due to lack of time.

(2:15) Vance Jacobson provided the first part of the conversion training for the committee.

**1. Childcare Centers**

PERB hearing scheduled for 2/18-20/03. (Item pending)

**2. Conversion Update**

Interviews will continue 10/29-31/02. These interviews should conclude the technology group #1 interviews. (Item to remain on agenda as an update)

**3. Bookstore Course Paks**

Doug reported the ad hoc committee (sub committee of Faculty Senate) met on 10/9/02. Committee is developing a form for faculty to sign stating their course paks do not contain materials to cause copyright infringement. If there is a copyright issue, the course pak will go to the ad hoc committee to read and forward to Xenadu (copyright compliance and printing vendor). There is concern that Xenadu provides the copyright service but also requires printing the course pak and the cost of printing is then passed on to students. The committee and Barnes & Noble are looking into local/internet vendors to provide copyright compliance service only and printing work would remain with District printshop. Robert Wickstrom and Doug will meet with attorney George Holt to discuss copyright liability exposure. Next committee meeting is 10/23/02. George will attend the meeting.

(continued)

**COLLABORATIVE BARGAINING RECOLLECTIONS - CLASSIFIED**

**Date:** November 18, 2002

**Time:** 1:30 -5:00

**Place:** LRC 434

3.5

**FOR THE DISTRICT**

John Bukey\* (facilitator)

Ron Martinez

1.5° — Doug Smith (left 3:00)

Jeanne Leland

**FOR THE UNION**

Sandy Anderson

Jory Hadsell\* (absent)

Pat Hallahan (absent)

Guest: Sue Keller to replace Tim Kyle for the Union

\*Chief Negotiator

Facilitator for next time (11/25/02): Sandy

- **Check In:**
- **Review of Recollections - 10/28/02**

**1. Childcare Centers**

PERB hearing scheduled for 2/18-20/03. (Item pending)

**2. Conversion Update**

Doug – Discussed confusion regarding conversion and reorganizations. Sandy reported there will be a FUSE general meeting on 12/6/02 (see new off-agenda items #20 & 21 for concerns)

Jeanne - Technology group interviews completed (3 more this week). Technology job description drafts will arrive with Vance in early December. Cte needs to complete 2<sup>nd</sup> phase of conversion training with Vance in order to begin reviewing descriptions.

Who: Jeanne

What: Schedule Part 2 Conversion Training with Vance for early December.

When: ASAP

Conversion workgroup needs to meet to determine Trades Group interviews.

Who: Jeanne

What: Schedule Conversion workgroup with Vance for this week.

When: ASAP

**3. Bookstore Course Paks**

Doug – Consensus to use the old system for producing course paks for Spring 03. Fall 03 will use new process that requires copyright sign-off for faculty. Copyright Cte. is working through issues. There will be a meeting with Faculty Senate to discuss service issues. A communiqué regarding new course pak process will be going out to faculty.

(Continued)

**COLLABORATIVE BARGAINING RECOLLECTIONS - CLASSIFIED**

**Date:** November 25, 2002

**Time:** 1:30 -4:40

**Place:** LRC 313

3.2

**FOR THE DISTRICT**

John Bukey\*

Ron Martinez

Doug Smith (absent)

Jeanne Leland

**FOR THE UNION**

Sandy Anderson (facilitator)

Jory Hadsell\*

Pat Hallahan

Sue Keller (absent)

Guest: Robert Wickstrom (1:50-2:05)

\*Chief Negotiator

Facilitator for next time (12/02/02): Ron

- **Check In:**
- **Review of Recollections - 10/28/02**

**1. Childcare Centers**

PERB hearing scheduled for 2/18-20/03. (Item pending)

**2. Conversion Update**

Conversion Training and job description review is scheduled with Vance on Wednesday, December 11 from 2-5, LRC 434.

Conversion Workgroup meeting to be scheduled via e-mail to determine Trades Group interviews and other issues.

**3. Bookstore Course Paks**

Consensus to use the old system for producing course paks for Spring 03. Fall 03 will use new process that requires copyright sign-off for faculty. Copyright Cte. is working through issues. There will be a meeting with Faculty Senate to discuss service issues. A communiqué regarding new course pak process will be going out to faculty.

(Item closed)

**4. Eriksen - Appeal**

Susan McVay will be out until January. Scheduling pending.

(continued)

**COLLABORATIVE BARGAINING RECOLLECTIONS - CLASSIFIED**

**Date:** December 2, 2002

**Time:** 1:30 -5:00

**Place:** LRC 313

3.5

**FOR THE DISTRICT**

John Bukey

Ron Martinez (facilitator)

Doug Smith

Jeanne Leland

**FOR THE UNION**

Sandy Anderson

Jory Hadsell\*

Pat Hallahan

Sue Keller

\*Chief Negotiator

Facilitator for next time (12/02/02): Pat

- **Check In:**
- **Review of Recollections – 11/25/02**

Group decided to focus 12/9/02 meeting discussion as follows:

1<sup>st</sup> - Release Time, 2<sup>nd</sup> – Summer Schedule, and 3<sup>rd</sup> – Reorgs.

**1. Childcare Centers**

PERB hearing scheduled for 2/18-20/03. (Item pending)

**2. Conversion Update**

Conversion Training and job description review is scheduled with Vance on Wednesday, December 11 from 2-5, LRC 434.

Conversion Workgroup meeting scheduled on Wednesday, December 11 from 10-11:30 to discuss Group II (Trades) interviews and other issues.

**3. Eriksen - Appeal**

Susan McVay will be out until January. Scheduling pending.

**4. CTO Use**

Reminder needs to be sent to managers/supervisors to follow-up with their employees to use up their CTO balances before 6/30/03. Two reminders to be sent, one before Winter break and another to be sent in spring. Millie just received CTO balance sheets up to 10/31/02. She will process and send out reminders. (Item closed)

**5. Summer Schedule**

Discussion continued regarding 4/10s for summer. Agreed to decide before winter break. District proposal to give 4 hour summer schedule floater to be used during the 4/10 schedule on a “use it or lose it” basis. FUSE to consider proposal and report back.

Discussion and Options: Go to a mandatory 5/8 schedule, is 4/10 schedule worth the savings? Make 4/10 a permanent summer schedule or for the next three years. Look into options for the 4<sup>th</sup> of July week.

**COLLABORATIVE BARGAINING RECOLLECTIONS - CLASSIFIED**

**Date:** December 9, 2002  
**Time:** 1:30-4:00  
**Place:** LRC 313

2.5

**FOR THE DISTRICT**

John Bukey\*  
Ron Martinez  
Doug Smith  
Jeanne Leland

**FOR THE UNION**

Sandy Anderson  
Jory Hadsell\*  
Pat Hallahan  
Sue Keller

\*Chief Negotiator

- **Review of Recollections – 12/9/02**
- **Check In**

Today's meeting (12/9/02) began with an elephant and focused on relationships within the group. Concerns were raised regarding issues of trust, confidentiality, rumors, assumptions, leadership, collaboration, and process. Discussion moved to the importance of good relationships and the possibility of rebuilding. There is concern regarding the current budget situation and decisions that will need to be made. FUSE stated they will let District know when they will meet again and requested not to meet until after the first of the year. District will communicate with Jory, as FUSE President, regarding matters in the meantime and provide ACBDs that affect the unit. Doug provided an update on the budget, discussed a recommendation to suspend selected open positions in management, classified, and faculty pending analysis by today's meeting with Executive Committee. Morgan Lynn was to provide information regarding the reorganization in EP&S. Due to the current discussions, FUSE requested she be asked to postpone her ACBD. The Conversion Workgroup is scheduled to meet on Wednesday 12/11. Jory voiced concern regarding continuing with conversion. Sandy handed out information regarding AB500.

(End of 12/9/02 recollections. Group did not review 12/2/02 recollections)

- **Review of Recollections – 12/2/02**

Group decided to focus 12/9/02 meeting discussion as follows:

1<sup>st</sup> - Release Time, 2<sup>nd</sup> – Summer Schedule, and 3<sup>rd</sup> – Reorgs.

**1. Childcare Centers**

PERB hearing scheduled for 2/18-20/03. (Item pending)

**2. Conversion Update**

Conversion Training and job description review is scheduled with Vance on Wednesday, December 11 from 2-5, LRC 434.

Conversion Workgroup meeting scheduled on Wednesday, December 11 from 10-11:30 to discuss Group II (Trades) interviews and other issues.



**COLLABORATIVE BARGAINING RECOLLECTIONS  
CLASSIFIED/DISTRICT RETREAT**

**Date:** January 17, 2003

**Time:** 10:00 -5:00

**Place:** Loomis Library

**FOR THE DISTRICT**

John Bukey\*, Ron Martinez, Doug Smith, Jeanne Leland

**FOR THE UNION**

Bernard Acuna, Sandy Anderson, Jory Hadsell\*, Sue Keller, Diana Kenton, Rick  
McMurtry, Shari Newman

\*Chief Negotiator

• **Check In**

The retreat began with a discussion of the group's relationships and how interpersonal relationships perceived to have broken down. FUSE cited repeated lack of communication which created mistrust. There is interest in repairing the relationships. One suggestion is to identify problem areas and develop additional ground rules for future meetings.

**Communication –**

Communication links need to continue. Ron feels having a FUSE rep full-time is beneficial to communicating and resolving personnel issues in a timely manner. Concern that discussion of certain situations can compromise confidentiality and due process. Shari will use judgment to preserve confidentiality when relaying issues from District to the FUSE Executive Board. Suggested ground rule: Agree to outside guests before meeting. FUSE plans to develop newsletter and brown bag lunch meetings for membership. FUSE reported that a manager told staff that lead and shift differential pay was to stop. Ron stated this is untrue.

**Contract -**

FUSE currently has a subcommittee working on the FUSE contract. Membership includes Shari, Bernard, Rick, Lynn Young, and Maggie Green. Contract changes are both cosmetic and substantive. FUSE interest in removing references to collaboration from certain articles in the contract, such as grievances. Reminder that contract changes must be "sunshined." Discussion concerning using either the collaborative model or traditional bargaining method for wages, working conditions, and benefit issues. ***The group agreed to use a traditional compressed (shorter time period) process for contract issues.*** FUSE requests that District be sensitive to feedback regarding this agreement. FUSE does not want to be perceived as abandoning collaboration. Bernard will identify contract items that need work now and which items can be done later. FUSE interest in setting aside a block of time off-campus to concentrate on contract issues. Scheduled Mondays, February 3 and February 10 from 9-4 in LRC 313. Goal is to resolve contract issues by 6/30/03.

**BARGAINING RECOLLECTIONS - CLASSIFIED**

**Date:** February 3, 2003  
**Time:** 9:00 -4:00  
**Place:** LRC 313

70

**FOR THE DISTRICT**

John Bukey  
Ron Martinez  
Doug Smith  
Jeanne Leland

**FOR THE UNION**

Sandy Anderson  
Jory Hadsell  
Pat Hallahan\*  
Sue Keller

\*Chief Negotiator

Today's negotiations used the traditional negotiation method as agreed to at the 1/17/03 District/FUSE Retreat. Group agreed it would be a hybrid of traditional and collaborative methods. FUSE presented new ground rules (handout) that were discussed but the group decided these were not necessary and would require that the District suspend Article 4. The group decided to use the existing ground rules. Group agreed that Jeanne would continue to write the recollections to record negotiations. Pat Hallahan noted that Jory has been erroneously listed as chief negotiator for FUSE in the last five meeting recollections. Correction to be made in future recollections.

In response to District request the current officers for FUSE are:

- Shari Newman, President/Business Manager
- Bernard Acuna, Vice President
- Sue Keller, Secretary
- Diane Kenton, Treasurer
- Rick McMurtry, Sergeant at Arms, Representative
- Jory Hadsell, Representative
- Sandy Anderson, Representative
- Pat Hallahan, Chief Negotiator

**1. Article 21**

It is unclear in the contract language if seniority is defined as hire date only as stated in Art. 21.2.1a, or as hire date and seniority Art.21.2.1b.

- W: Ron
- W: Contact Peter Kolster for intent of language
- W: For 2/10/03

Job Tracks need updating. Shari gave Jeanne a draft of proposed updated job tracks to review.

- W: Jeanne
- W: Provide FUSE with a revised listing of job tracks based on Shari list
- W: For table discussion on 2/10/03

**BARGAINING RECOLLECTIONS - CLASSIFIED**

**Date:** February 10, 2003

**Time:** 10 :00-4:00

**Place:** LRC 313

b.o

**FOR THE DISTRICT**

John Bukey\*

Ron Martinez

Doug Smith

Jeanne Leland

\*Chief Negotiator

**FOR THE UNION**

Sandy Anderson

Jory Hadsell

Shari Newman\*

Sue Keller

Shari reported that Pat Hallahan is no longer at the table. Shari will be at the table in Pat's place as chief negotiator. The FUSE team in attendance today will be the team through June. The negotiating method to be used will be a hybrid of traditional and collaborative. Today's discussions will be article 21, 2, and "stuff".

**Article 21**

Shari handed out the FUSE proposed language for article 21 for the group to review. Shari reported that classified staff is very concerned about layoffs due to what they heard back from their managers who attended the management retreat. District reported that this was not the message. The message was to look toward possible reassignment and other options to prevent a layoff. Shari reported the message she gave at the Brown Bag was "no layoffs, this year" but that it was interpreted as "no layoffs". She stated the union is interested in being flexible with regard to assignment. Discussion continued regarding messages and how they are interpreted. John stressed the importance of sufficient communication here at the table so the same message goes out. District and FUSE can support each other when messages are misinterpreted and through changing situations and information.

Ron stated we need to anticipate and prepare for layoffs in the event they occur. Preparation can be done in three phases. Phase 1 – Revise article 21 and identify job tracks. Phase 2 – Shore up the workforce – there is legal flexibility to promote from within if the workforce is not increased. Also flexibility of movement/assignment may help to avoid layoffs. Phase 3 – Financial information to determine if layoff is needed.

John stated we should not be concerned with expanding the workforce (i.e. Childcare, temporary employees) in this climate but should focus on protecting the core workforce and moving people around to provide service.

Discussion turned to those employees who may be eligible to retire and possible retirement incentives. Ron reported employees cannot buy STRS/PERS airtime. They would have needed to apply for this already, so retirement incentive may not work. Discussion of giving return rights to new retirees to work up to 960 hours annually.

## BARGAINING RECOLLECTIONS - CLASSIFIED

**Date:** March 3, 2003

**Time:** 10 :00-4:00

**Place:** LRC 313

6.0

### FOR THE DISTRICT

John Bukey\*

Ron Martinez

Doug Smith

Jeanne Leland

\*Chief Negotiator

### FOR THE UNION

Sandy Anderson

Jory Hadsell (resigned)

Shari Newman\*

Sue Keller

Shari reported that Jory Hadsell has resigned from the FUSE Executive Board and Negotiations.

Ron discussed "Friday Letter" dated 2/28/03 as an ACBD to avoid miscommunication with FUSE regarding items purported to be at the tables. He reviewed those items that were discussed at the President's Budget Task Force meeting regarding budget reduction ideas.

### Article 2

Shari will be meeting on Thursday, 3/6/03 with Mandy and others as part of the subcommittee discussing temporary employees. No counterproposal was offered by the District at this time.

### Article 21

District presented its counterproposal to Article 21 (identified as Counterproposal #1 3/3/03). The District and FUSE reviewed the counterproposal, line by line, and compared both FUSE's proposal to the counterproposal.

### Items of Discussion:

- Seniority list – the possibility of including temporary positions held by classified staff as another means of bumping. How long would the temporary position need to be held in order to bump into the position should layoffs occur?
- Bumping vs. Reassignment – term to be used in layoff article. John discussed "bumping" as a having a legal meaning within labor relations and not necessarily a negative term since there is no fault when one is "bumped" out of a position. "Reassignment" can be either voluntary or involuntary, it may be considered a negative term by future employers.
- Job Tracks – FUSE needs time to review job track proposal prepared by consultant Vance Jacobson. FUSE is concerned about some senior employees not having a job track option within the District's proposed version.

## BARGAINING RECOLLECTIONS - CLASSIFIED

**Date:** March 10, 2003

**Time:** 10:00-2:00

**Place:** LRC 313

4.0

### FOR THE DISTRICT

John Bukey\*

Ron Martinez

Doug Smith

Jeanne Leland

### FOR THE UNION

Sandy Anderson

Sue Keller

Shari Newman\*

\*Chief Negotiator

Guest: Vance Jacobson, classification consultant (12:45)

- Review of recollections from March 3, 2003

### Article 2

3/10/03 -Shari reported on the temporary employee workgroup meeting held on 3/6/03. Workgroup members are Shari, Mandy Davies, Carla Epting-Davis, and Tina Ludutsky-Taylor. Discussion included the use of temps and student help. Issues discussed: temps and students doing unit work; concern regarding eligibility change from 6.0 units to .5 units for student workers; and reports of some students working 40 hrs per week. The workgroup discussed developing position descriptions for students, temps, and volunteers, possibly written by or in consultation with the classification consultant. It was decided that the "Pink Book" (temporary employee job descriptions) is the District's charge. Further discussion included: retirees given priority consideration for temporary positions, classified hourly step A pay rate given to someone doing the entire job - a temp would not be doing the entire job and would be paid at a lower rate; and the number and status of current student workforce. The District can continue to hire on a temporary basis as addressed in AB500; temp would not be hired "on a continuous basis" and require a Board approved hire end date. District counterproposal pending.

### Retiree Incentive

3/3/03 - Ron presented a proposal for a retiree incentive for 02-03 and 03-04. The incentive is offered to avoid layoffs through senior classified staff salary savings. This proposal is dependent upon Board approval. The incentive includes grandfathering (up to two years) pre-94s to 15 yrs service credit. FUSE discussed a counterproposal from 25/12.5 to 33/12 or 15 to buy PERS "airtime," or G salary step at 2.5%. FUSE also expressed interest that the incentive package be the same for other units.

3/10/03 - Doug outlined the retiree incentive option, the "Golden Handshake Plan," he will take to the Board seeking authority to offer.

- 33%/11%,
- Attrition savings to District
- District pays incentive
- Notice by 4/30 for 6/30/03, 12/31/03

## BARGAINING RECOLLECTIONS - CLASSIFIED

**Date:** March 24, 2003

**Time:** 10 :00-5:00

**Place:** LRC 313

### FOR THE DISTRICT

John Bukey\* (facilitator)

Ron Martinez

Doug Smith

Jeanne Leland

### FOR THE UNION

Sandy Anderson

Sue Keller

Shari Newman\*

\*Chief Negotiator

Guest: Jory Hadsell, Vance Jacobson (3:00-5:00)

- Review of recollections from March 10, 2003

### Formula

3/24/03 - Jory Hadsell is present for discussions as resource for formula discussions. Jory handed out the FUSE "Bucket Simulation" – FYE 6/30/03 spreadsheet for the group to review. Jory presented the current year status of the FUSE formula in general terms and Doug provided additional explanation.

The following notes on the discussion occur in the order of the 4-page handout:

There are financial reports that come out at different times of the year that effect the formula (P1-Feb, P2-June with a recalculation the following Feb) and will require recalculations made to the 01-02 formula. Sue and Sandy requested copies of the P1 report.

#### Income

(Credits) – Statewide COLA might have been estimated at 2% but will probably go to zero. 20% equity set aside – percs (this may eventually disappear). Historically it was created for faculty, not really used for classified. Per contract – this will be jointly reevaluated after two years. Additional savings is actually attrition savings. 1% on-going funds is a "carryover" from 01-02 off schedule payout.

(Deducts) – Step F will need a recalculation (tune-up)

Medical Cap – recalculate for fiscal/calendar year payments

Step and column, longevity – needs recalculation

PERS – pending (might be less)

#### Growth

(Credits) - 2/3 ½ FUSE allocation agreement for 2 years. District pays difference if it used to buy positions.

#### Efficiency

Estimated at 6.73%

Setting percentages is a critical element of the formula. This will create allocations for FUSE, SCFA, and District (District does not have a "bucket"). An update is needed for

**BARGAINING RECOLLECTIONS - CLASSIFIED**

**Date:** April 7, 2003  
**Time:** 10 :00-3:00  
**Place:** LRC 313

5.0

**FOR THE DISTRICT**

John Bukey\*  
Ron Martinez  
Doug Smith  
Jeanne Leland

**FOR THE UNION**

Sandy Anderson (facilitator)  
Sue Keller  
Shari Newman\*

\*Chief Negotiator  
Guest: Jory Hadsell

- Review of recollections from April 7, 2003

**Check-In**

FUSE will process a Travel and Conference request form for their upcoming travel to Las Vegas and Chicago. Ricky McMurtry, Shari, and Sandy will be traveling to Las Vegas. Ricky and Sandy will be using two days of release time, Sandy will be using one day of vacation. Shari will be using three days of release time.

**Formula**

Jeanne stated that due to the complexity and detail involved in the formula, the recollections will include only general or those items requested to be captured. FUSE membership will need to ratify for contract renewal. The membership wants to know what is the status of last year's agreements. Continuation of the bucket needs to be decided. It will remain in the contract until it is negotiated out. FUSE needs to know from the District by April 9 whether or not the Board approved the additional retirement incentives on April 8<sup>th</sup>. Discussion regarding how the growth formula worked with regard to the bucket.

**Consensus proposal #1**

(Intent to deal with 02-03 & 03-04 issues)

- |    |   |                       |
|----|---|-----------------------|
| A. | New position dollars for 02-03 (includes 50% and 1/3)<br>And exchange for 03-04 PERS deficit  | \$490,000.00          |
| B. | (In anticipation of what to do with 2%)   |                       |
| •  | G Step (part of retiree incentive and offset by \$27,000.00)  | \$75,000.00           |
| •  | Change Longevity language to be changes from<br>"completion of" to "commencement of."   | Cost to be determined |
| •  | Defer 1% to 03-04 (means 1% off schedule payout)<br>1% to possibly fund Post-94 Trust contribution<br>To be replaced next year with 1% across the board | \$100,000.00          |
| •  | Cesear Chavez Day allocated to Spring Break   | \$43,000.00           |

**Cost**

**BARGAINING RECOLLECTIONS - CLASSIFIED**

**Date:** April 21, 2003  
**Time:** 9 :00-12:30  
**Place:** LRC 313

3.5

**FOR THE DISTRICT**

John Bukey\* (facilitator)  
 Ron Martinez (absent)  
 Doug Smith  
 Jeanne Leland

**FOR THE UNION**

Sandy Anderson  
 Sue Keller  
 Shari Newman\*

\*Chief Negotiator

Guest: Jory Hadsell (10-12:30), Mandy Davies (9-10)

- Review of recollections from April 7, 2003

- **Check-In**

Due to confusion regarding start time, FUSE members did not arrive until after 10:00 A.M. (See item 2 for discussion between 9-10:00).

**1. Formula**

Jeanne stated that due to the complexity and detail involved in the formula, the recollections will include only general information and those items requested to be captured. FUSE membership need to ratify contract renewal. The membership wants to know the status of last year's agreement. Continuation of the income formula also needs to be decided. It remains in the contract until it is negotiated out. FUSE needs to know by April 9 whether or not the Board approved the additional retirement incentives on April 8<sup>th</sup>.

**Consensus Proposal #1 by FUSE**

(Intent to deal with 02-03 & 03-04 issues)

- |    |   |                       |
|----|---|-----------------------|
| A. | New position dollars for 02-03 (includes 50% and 1/3)<br>And exchange for 03-04 PERS deficit  | \$490,000.00          |
| B. | (In anticipation of what to do with 2%)   |                       |
|    | • G Step (part of retiree incentive and offset by \$27,000.00)  | \$75,000.00           |
|    | • Change Longevity language to be changes from "completion of" to "commencement of."  | Cost to be determined |
|    | • Defer 1% to 03-04 (means 1% off schedule payout)<br>1% to possibly fund Post-94 Trust contribution<br>To be replaced next year with 1% across the board | \$100,000.00          |
|    | • Cesear Chavez Day allocated to Spring Break   | \$43,000.00           |

**Cost**

	<u>02-03</u>	<u>03-04</u>
G-step	\$75,000	
Longevity	?	
1% deferred Chavez	\$100,000 (1x)	\$100,000 (on-going)
		\$43,000



## NEGOTIATIONS RECOLLECTIONS – FACULTY

Date: May 1, 2003  
Time: 2:00-4:00 PM  
Location: J7A

2.0

### FOR THE DISTRICT

Doug Smith  
Ron Martinez  
Jeanne Leland  
John Bukey\*(facilitator)

### FOR THE ASSOCIATION

Richard Alman  
Wayne Barbee  
Don Cosper  
Luis Sanchez\*  
Deb Sutphen  
Jim Weir

\*Chief Negotiator

Guests: Diane McKnight (2-3:00)

- Check-In: April 17 no meeting – spring break, April 24-meeting canceled
- Review of Recollections – 4/10/03

### 1. Department Chair Article

Current article/side letter agreement 01-11 (pg.230) ends 6/30/03. Consensus proposal to extend article for one more year. Poll Deans, Faculty, and Dept. Chairs to discover what is working and what isn't, interests, and amendments. Discussion regarding inclusion of part-time faculty and developing language to invite, not require, participation. Suggestion to have Dept. Chairs meet with part-time faculty. Ron reported that Morgan will be sharing a revised draft of the Dept. Chair provision from May 02. Dept. Chair meetings to be held on 2/24 and 2/27. Don attended the Dept. Chair meeting(s) and reported the Dept. Chairs interest are more flexibility. They are not interested in release time, supervising classified staff, evaluations, or collegial complaints. Don wants to craft language for those undergoing curriculum review. Due to the increased workload for curriculum review, Chairs may need release time and/or administrative assistant assistance. Don stated District should pay for proposed poll.

3/20/03 – Don reported the poll is in draft form to be reviewed by the SCFA E-board and once approved, it will be mailed out.

4/10/03 – Don reported that the poll is completed and he will be sending out through Craig Kelly pending Morgan Lynn's review.

5/1/03 – Don reported that the meeting was held, the poll is written, and it just needs to be sent out.

### 2. Retirement Incentive Program

District and SCFA presented their proposals. Discussion regarding various scenarios and situations: waiver of FT/PT ratio (if waiver granted-how many years?), longevity, suspension of formula, STRS service credit, two year incentive

**BARGAINING RECOLLECTIONS - CLASSIFIED**

**Date:** May 5, 2003

**Time:** 10:00 -3:30

**Place:** LRC 313

5.5

**FOR THE DISTRICT**

John Bukey\*  
Ron Martinez  
Doug Smith  
Jeanne Leland

**FOR THE UNION**

Sandy Anderson  
Sue Keller  
Shari Newman\* (facilitator)

\*Chief Negotiator

Guest: Mandy Davies (10:15-11:00)

- Review of recollections from April 21, 2003

• **Check-In**

Shari stated FUSE officers have been elected: Bernard Acuna – President, Sandy Anderson, Vice President, Shari Newman, Business Manager, Sue Keller, Secretary, Diana Kenton, Treasurer. There will be a runoff election (5/16/03) for Reps-at-Large. Non-voting auditors are Christina Mancini, John Lervold, Elaine Sturgell. Jory Hadsell will continue as a resource with the formula. Currently Shari Newman and Tim Kyle are FUSE reps on JLMC. Post-94 Trustee Board yet to be determined.

**1. Formula**

Jeanne stated that due to the complexity and detail involved in the formula, the recollections will include only general information and those items requested to be captured. FUSE membership need to ratify contract renewal. The membership wants to know the status of last year’s agreement. Continuation of the income formula also needs to be decided. It remains in the contract until it is negotiated out. FUSE needs to know by April 9 whether or not the Board approved the additional retirement incentives on April 8<sup>th</sup>.

**Consensus Proposal #1 by FUSE**

(Intent to deal with 02-03 & 03-04 issues)

- |    |   |                       |
|----|---|-----------------------|
| A. | New position dollars for 02-03 (includes 50% and 1/3)<br>And exchange for 03-04 PERS deficit  | \$490,000.00          |
| B. | (In anticipation of what to do with 2%)   |                       |
| •  | G Step (part of retiree incentive and offset by \$27,000.00)  | \$75,000.00           |
| •  | Change Longevity language to be changes from<br>“completion of” to “commencement of.”   | Cost to be determined |
| •  | Defer 1% to 03-04 (means 1% off schedule payout)<br>1% to possibly fund Post-94 Trust contribution<br>To be replaced next year with 1% across the board | \$100,000.00          |
| •  | Cesar Chavez Day allocated to Spring Break  | \$43,000.00           |

Cost

02-03

03-04

## BARGAINING RECOLLECTIONS - CLASSIFIED

Date: May 12, 2003

Time: 9:00 -12:00

Place: L-193

3.0

### FOR THE DISTRICT

John Bukey\*

Ron Martinez (facilitator)

Doug Smith

Jeanne Leland

### FOR THE UNION

Sandy Anderson

Sue Keller

Shari Newman\*

\*Chief Negotiator

- Review of recollections from May 5, 2003

- Check-In

#### 1. Formula

Jeanne stated that due to the complexity and detail involved in the formula, the recollections will include only general information and those items requested to be captured. FUSE membership need to ratify contract renewal. The membership wants to know the status of last year's agreement. Continuation of the income formula also needs to be decided. It remains in the contract until it is negotiated out. FUSE needs to know by April 9 whether or not the Board approved the additional retirement incentives on April 8<sup>th</sup>.

#### Consensus Proposal #1 by FUSE

(Intent to deal with 02-03 & 03-04 issues)

- |    |   |                       |
|----|---|-----------------------|
| A. | New position dollars for 02-03 (includes 50% and 1/3)<br>And exchange for 03-04 PERS deficit  | \$490,000.00          |
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| •  | Defer 1% to 03-04 (means 1% off schedule payout)<br>1% to possibly fund Post-94 Trust contribution<br>To be replaced next year with 1% across the board | \$100,000.00          |
| •  | Cesar Chavez Day allocated to Spring Break  | \$43,000.00           |

#### Cost

	<u>02-03</u>	<u>03-04</u>
G-step	\$75,000	
Longevity	?	
1% deferred	\$100,000 (1x)	\$100,000 (on-going)
Chavez		\$43,000
C.	Increase release time by 1.0 FTE (to be paid at 18C) Additional square footage in FUSE office	
D.	Agreement on multi-year on-going position vacancies/replacements	

**BARGAINING RECOLLECTIONS - CLASSIFIED**

**Date:** May 19, 2003

**Time:** 10:00 -4:00

**Place:** LRC-313

6.0

**FOR THE DISTRICT**

John Bukey\* (left 2:45)

Ron Martinez

Doug Smith (absent)

Jeanne Leland

**FOR THE UNION**

Sandy Anderson

Sue Keller (facilitator)

Shari Newman\*

\*Chief Negotiator

- Review of recollections from May 12, 2003

- **Check-In**

Shari reported the new elected FUSE officers are: John Healy, Sergeant at Arms; Joan Basque and Joe Malfa, Executive Board or Reps at Large.

**1. Formula**

Due to the complexity and detail involved in the formula, the recollections will include only general information and those items requested to be captured.

5/19/03 – No discussion because neither Doug nor Jory were able to attend today. Shari said Jory had some changes to the financial sheet from last meeting.

**2. Article 2 – Temps**

Mandy presented the District Article 2 proposal (handout). Revisions to the article were developed by Mandy, Carla Epting-Davis, and Tina Ludutsky-Taylor. Shari Newman met with the group initially to discuss issues and concerns. The article was reviewed and suggestions for editing made. Discussion regarding temporary and student job descriptions and hourly rate. One suggestion was to use the entry level (I) classified job descriptions for temporary positions and pay the corresponding A step. However, not all temporary positions are covered by classified descriptions (model, EMT, interpreter). Decision to have the temporary position brought to the bargaining table to determine how the position is to be classified and whether a new job description is required. According to George Holt, the term “professional experts” refers to contractors, lawyers, architects, etc. and are considered excluded from the classified unit. This additional language was determined to be unnecessary and the group agreed to delete the sentence (Art.2:1.line 14) in the District revisions of Article 2.

W: Ron and Doug

W: Direct Lonnie to continue to provide parking passes to the employees covered by Article 2.

W: Subject to ratification of article language

5/19/03- Discussion regarding the use of District Student Help Program student workers (Sandy handed out Board policy #5420). At one time 6.0 units were required in order to

## BARGAINING RECOLLECTIONS - CLASSIFIED

**Date:** June 3, 2003  
**Time:** 1:30 -4:00  
**Place:** Fireside Room

2.5

### FOR THE DISTRICT

John Bukey\*  
Ron Martinez (facilitator)  
Doug Smith  
Jeanne Leland  
\*Chief Negotiator

### FOR THE UNION

Sandy Anderson  
Sue Keller  
Shari Newman\*

Guest: Jory Hadsell

- Review of recollections from May 19, 2003
- Check-In

#### 1. Formula

(Due to the complexity and detail involved in the formula, the recollections will include only general information and those items requested to be captured.)

The group discussed clarifications regarding the formula concepts/options sheet from May 12, 2003. Revisions will be made to the sheet and distributed separately for further discussion.

#### 2. Article 2 – Temps

Pending - Discussion regarding temporary and student job descriptions and hourly pay rates. One suggestion was to use the entry level (I) classified job descriptions for temporary positions and pay the corresponding A step. However, not all temporary positions are covered by classified descriptions (model, EMT, interpreter). The group agreed to have the temporary positions that don't fit within the classified structure brought to the bargaining table to determine how the position is to be classified and whether a new job description is required.

W: Ron and Doug

W: Direct Lonnie to continue to provide parking passes to the employees covered by Article 2.

W: Subject to ratification of article language (pending)

Discussion regarding the use of District Student Help Program student workers (Sandy handed out Board policy #5420). At one time 6.0 units were required in order to participate in the District Student Help Program. Recently the requirement was changed to .50 units. Ron reported that Mandy Davies is currently working to increase the unit requirement (3.0 units and 32 hours work)

W: Jeanne

W: Invite Mandy to discuss possible changes to number of units and hours worked per week.

W: ASAP – August 2003

Sierra Joint Community College District  
Collective Bargaining  
FY 2002-2003  
Schedule 2  
Dean's Council Activities - Contract Administration

Date	Allbee, Neal	Brazil, Donna	Conway, Mary	Cunningham, Ray	Davies, Mandy	DeCourten, Frank	Dollesin, Ninette	Epting-Davis, Carla	Green, Dolly	Guevara, Stephanie	Haley, Brian	Helwick, Sue	Jackson, Darlene	Jung, Stephen	Kalina, Michelle	Kleinbach, Mary	Lee, Lawrence	Leland, Jeanne	Linde, Karen	Ludutsky-Taylor, Tina	Lynn, Morgan	Mackey, Jennifer	Martinez, Ron
8.1.02	1.20		1.20		1.20			1.20		1.20			1.20	1.20	1.20						1.20		1.20
8.22.02	1.00		1.00		1.00		1.00	1.00		1.00	1.00		1.00	1.00	1.00					1.00	1.00	1.00	1.00
8.29.02	1.20		1.20		1.20		1.20	1.20		1.20			1.20	1.20	1.20					1.20	1.20	1.20	1.20
9.12.02	0.70		0.70		0.70		0.70	0.70		0.70	0.70		0.70	0.70	0.70					0.70	0.70	0.70	0.70
10.10.02	1.30		1.30		1.30		1.30	1.30		1.30			1.30	1.30	1.30					1.30	1.30	1.30	1.30
10.17.02	0.70		0.70		0.70		0.70	0.70		0.70	0.70		0.70	0.70	0.70					0.70	0.70	0.70	0.70
10.24.02		0.30	0.30	0.30	0.30	0.30	0.30	0.30		0.30	0.30		0.30	0.30	0.30					0.30	0.30	0.30	0.30
11.7.02			0.90		0.90	0.90	0.90	0.90		0.90	0.90		0.90	0.90	0.90					0.90	0.90	0.90	0.90
11.14.02	0.50		0.50		0.50	0.50	0.50	0.50		0.50	0.50		0.50	0.50	0.50					0.50	0.50	0.50	0.50
11.21.02			0.50		0.50	0.50	0.50	0.50		0.50	0.50		0.50	0.50	0.50					0.50	0.50	0.50	0.50
1.23.03	0.40				0.40	0.40	0.40	0.40		0.40	0.40		0.40	0.40	0.40					0.40	0.40	0.40	0.40
1.30.03	1.40		1.40		1.40	1.40	1.40	1.40		1.40	1.40		1.40	1.40	1.40					1.40	1.40	1.40	1.40
2.6.03	2.00		2.00		2.00	2.00	2.00	2.00		2.00	2.00		2.00	2.00	2.00			2.00	2.00	2.00	2.00	2.00	2.00
2.6.03	1.00		1.00		1.00	1.00	1.00	1.00		1.00	1.00		1.00	1.00	1.00					1.00	1.00	1.00	1.00
2.13.03	0.60		0.60		0.60	0.60	0.60	0.60		0.60	0.60		0.60	0.60	0.60					0.60	0.60	0.60	0.60
2.20.03					0.80	0.80	0.80	0.80		0.80	0.80		0.80	0.80	0.80					0.80	0.80	0.80	0.80
2.27.03					0.90	0.90	0.90	0.90		0.90	0.90		0.90	0.90	0.90					0.90	0.90	0.90	0.90
3.6.03	1.30				1.30	1.30	1.30	1.30		1.30	1.30		1.30	1.30	1.30					1.30	1.30	1.30	1.30
3.6.03					1.00	1.00	1.00	1.00		1.00	1.00		1.00	1.00	1.00					1.00	1.00	1.00	1.00
3.13.03					1.00	1.00	1.00	1.00		1.00	1.00		1.00	1.00	1.00					1.00	1.00	1.00	1.00
3.20.03	0.50		0.50		0.50	0.50	0.50	0.50		0.50	0.50		0.50	0.50	0.50					0.50	0.50	0.50	0.50
4.3.03	0.50		0.50		0.50	0.50	0.50	0.50		0.50	0.50		0.50	0.50	0.50					0.50	0.50	0.50	0.50
4.10.03					0.70	0.70	0.70	0.70		0.70	0.70		0.70	0.70	0.70					0.70	0.70	0.70	0.70
4.24.03					1.00	1.00	1.00	1.00		1.00	1.00		1.00	1.00	1.00					1.00	1.00	1.00	1.00
5.8.03	0.60		0.60		0.60	0.60	0.60	0.60		0.60	0.60		0.60	0.60	0.60					0.60	0.60	0.60	0.60
5.22.03	1.00		1.00		1.00	1.00	1.00	1.00		1.00	1.00		1.00	1.00	1.00					1.00	1.00	1.00	1.00
Totals	15.90	0.80	7.80	1.60	20.10	16.10	20.80	15.10	2.30	22.00	12.90	1.30	17.90	17.70	8.30	13.30	1.60	4.80	13.10	17.80	20.50	0.50	20.70

Sierra Joint Community College District  
Collective Bargaining  
FY 2002-2003

Schedule 2

Dean's Council Activities - Contract Administration

Date	McKnight, Diane	Michaels, Sue	Nunnally, Delecia	Paulson, Jan	Reader, Vicki	Roberts, Millie	Schneider, Greg	Schwenk, Lonnie	Scott, Sandra	Smalley, Craig	Smith, Doug	Snyder, Scott	Sumner, Joann	Thiers, Laurie	Tsuji, Bill	Velazquez, Nilo	Volek, John	Walters Dunlap, Karen	White, Margaret	Wickstrom, Robert	Wilson, Woodrow	Wollesen, Mary	Yorde, Phil	
8.1.02	1.20		1.20	1.20					1.20				1.20	1.20	1.20									
8.22.02	1.00		1.00						1.00				1.00	1.00	1.00			1.00	1.00					
8.29.02	1.20		1.20						1.20		1.20		1.20	1.20	1.20			1.20	1.20					
9.12.02	0.70		0.70						0.70				0.70	0.70	0.70			0.70	0.70					
10.10.02			1.30							1.30				1.30	1.30			1.30	1.30					
10.17.02	0.70								0.70				0.70	0.70	0.70			0.70	0.70					
10.24.02	0.30		0.30		0.30	0.30	0.30	0.30	0.30		0.30		0.30	0.30	0.30			0.30	0.30		0.30	0.30		
11.7.02																								
11.14.02	0.50		0.50						0.50				0.50	0.50	0.50			0.50	0.50					
11.21.02																								
1.23.03	0.40		0.40						0.40				0.40	0.40	0.40			0.40	0.40					
1.30.03	1.40		1.40						1.40				1.40	1.40	1.40			1.40	1.40					
2.6.03	2.00		2.00						2.00				2.00	2.00	2.00			2.00	2.00					
2.6.03	1.00		1.00						1.00				1.00	1.00	1.00			1.00	1.00					
2.13.03	0.60		0.60						0.60				0.60	0.60	0.60			0.60	0.60					
2.20.03	0.80		0.80		0.80	0.80	0.80		0.80				0.80	0.80	0.80			0.80	0.80					
2.27.03	0.90		0.90		0.90	0.90	0.90		0.90				0.90	0.90	0.90			0.90	0.90					
3.6.03	1.30		1.30						1.30				1.30	1.30	1.30			1.30	1.30					
3.6.03	1.00		1.00						1.00				1.00	1.00	1.00			1.00	1.00					
3.13.03	1.00		1.00						1.00				1.00	1.00	1.00			1.00	1.00					
3.20.03	0.50		0.50						0.50				0.50	0.50	0.50			0.50	0.50					
4.3.03	0.50	0.50	0.50		0.50	0.50	0.50		0.50	0.50			0.50	0.50	0.50			0.50	0.50					
4.10.03	0.70		0.70						0.70				0.70	0.70	0.70			0.70	0.70					
4.24.03	1.00		1.00						1.00				1.00	1.00	1.00			1.00	1.00					
5.8.03	0.60		0.60						0.60				0.60	0.60	0.60			0.60	0.60					
5.22.03	1.00		1.00						1.00				1.00	1.00	1.00			1.00	1.00					
Totals	18.50	0.50	19.20	1.20	2.50	1.60	1.60	0.80	14.20	0.50	6.90	0.80	19.10	20.40	20.20	0.30	2.60	20.80	12.00	3.80	2.10	1.10	0.80	

Dean's Council  
Membership  
2002

OPAK:  
DeCourten Scott  
Guevara Thiers  
High  
Jackson  
Linde  
Nunnally

✓ Neal Allbee	Assoc. Dean, Public Safety
✓ Carla Epting-Davis	Assoc. Dean, Student Services
✓ Mandy Davies	Assoc. Vice President, Student Services
Frank DeCourten	Dean, Tahoe/Truckee
✓ Ninette Dollesin	Program Manager, EP&S (Educational Programs and Services)
Stephanie Guevara	Assoc. Dean, Business and Technology (Interim)
✓ Brian Haley	Dean, Library and Learning Resource Center
Jan High	Consultant-Dean, PE and Athletics
Darlene Jackson	Assoc. Dean, Science and Mathematics (Interim) and Assoc. Dean, Child Development Centers
✓ Stephen Jung	Dean of Business and Technology (Interim)
Karen Linde	Athletic Director (Interim)
✓ Morgan Lynn	Vice President, Educational Programs & Services
✓ Tina Ludutsky-Taylor	Provost, SC/Nevada County Campus.
✓ Diane McKnight	Assoc. Dean, Liberal Arts
Delecia Nunnally	Assoc. Dean, Student Services
Sandra Scott	Director, Economic Development
✓ Jo Sumner	Assoc. Dean, Curriculum & Instructional Support
Laurie Thiers	Program Manager, EP&S (Interim)
✓ Bill Tsuji	Dean, Liberal Arts
✓ Karen Walters Dunlap	Dean of Science and Mathematics (Interim)
✓ Margaret White	Assoc. Dean, Nursing

**Additional Attendees:**

✓ Ron Martinez	Assoc. Vice President, Human Resources (Interim)
✓ Doug Smith	Vice President, Finance and Administration
✓ Mary Kleinbach	Executive Secretary-EP&S

Ad/DC list:3/14/03



Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

1.2°

DATE: AUGUST 1, 2002

- \* Morgan Olyn
- \* J. Paulson
- Jo Summer
- Bill M. Szaj
- \* Michelle Kalina (Michelle Kalina) <sup>Kalina</sup>
- Neal Allbee
- Diane McMight
- \* Darlene Jackson
- \* Delecia J. Nunnally
- Mandy Davis (Mandy Davis)
- Carla Epting-Davis (Carla Epting-Davis)
- \* Stephanie Gu evara (Stephanie Gu evara)
- Stephen Jung (Stephen Jung)
- Larry V. Conway
- \*(Ron Martinez?)
- \* Sandra Scott
- \* Laurel Thuro

ae/mandcostlog

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs : SVCS

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
8/1/02	Deans' Council Meeting And	SCFA	40 Min		
1/1	Discussions of Negotiation	FUSE	30 Min		
1/1	MEETINGS				
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature M. Kleenbad Date 8-2-02

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

1.0°

DATE 8-22-02

June Gudimov

Jo Sumner

Audra Scott

Karyn Conway

Yareil Thurs

Neal Albeda

nette? -  
lesn -  
Shirley Adams

Morgan Ly

Karen Waters Dunlop (Karen Waters Dunlop)

Jianan McKnight

B. Haley

~~Stephen Adams~~

Julia Adams

Delecia Munnally

Mandy Dineen

Maggi Shires

~~M. [unclear]~~ (Ron Martinez?)

Kathleen Jackson

Debrae Guey

Michelle Kalina (Michelle Kalina ← on your sch)

Ben Truji

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs : SVCS

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
8/22/02	Deans' Council Meeting And	SCFA	40 min		
1/1	Discussions of Negotiation	FUSE	20 Min		
1/1	MEETINGS				
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
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Employee Signature M. Klein Date 8-23-02

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

120

DATE AUGUST 29, 2002

Jo Sumner

Mandy Davis

Dianne McAnight

Dee Smith

Stephanie Green

Margaret  
Anne Hedgesky

Ka Ks Dunlap

Ron  
Martinez

~~Al Murray~~  
Paul G. G.

~~Paul G. G.~~

Neal Allbee

Laurel Thuro

Verette Dollesin

Glory S. Conway

Debra Munnally

Barbara Jackson

Michelle Kalina

Studer Scott

Bill Guzzi

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs.

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
8/29/02	Deans' Council Meeting And	SCFA	40 min		
1/1	Discussions of Negotiation	FUSE	30 min		
1/1	MEETINGS				
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					

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Employee Signature M. K. Badi Date 8-30-02

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.7°

DATE SEPTEMBER 12, 2002

<u>Shirley Dolan</u>	<u>Anna Juditsky</u>
<u>Laurel Thiers</u>	<u>Sandra Scott</u>
<u>Brian Haley</u>	<u>Mandy Davier</u>
<u>Stephanie Brewer</u>	<u>Morgan Lynn</u>
<u>Ka Walters Brooks</u>	<u>Mary Kleisner</u>
<u>Pat Marty</u>	
<u>SEP Day</u>	(Stephen Jung)
<u>Neal Allbee</u>	
<u>Debra J. Nunnally</u>	
<u>Ullrich</u>	
<u>Clayton Conway</u>	
<u>Michelle Jackson</u>	
<u>Jo Sumner</u>	
<u>Michelle Kalina</u>	(Michelle Kalina)
<u>Joanna McLaughlin</u>	
<u>Bill M. Tsuji</u>	

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
9/12/02	Deans' Council Meeting And	SCFA	30 min		
1/1	Discussions of Negotiation	FUSE	10 min		
1/1	MEETINGS				
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
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Employee Signature M. Leubke Date 9-13-02

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_



Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

1.3°

OCT. 10, 2002

DATE 10-10-02

<u>M. Lynn</u>	<u>Janette Dolson</u>
<u>J. Subutsky-Casper</u>	<u>Mary Klewinski</u>
<u>Mandy Davies</u>	<u>[Signature]</u>
<u>Bill M. Guzi</u>	
<u>Michelle Kalina</u>	<u>(Michelle Kalina)</u>
<u>Ray S. Conway</u>	
<u>Neal Albee</u>	
<u>[Signature]</u>	
<u>Debra Munnally</u>	
<u>Frank DeCoudre</u>	
<u>Darlene Jackson</u>	
<u>Dary Sweet</u>	
<u>Adriane Gurnea</u>	
<u>Karen Walker Pyle</u>	
<u>ROBERT WICKSTROM</u>	
<u>Laurel Thiers</u>	

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs - SVCS

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
10/20/02	Deans' Council Meeting and	SCFA	1 HR		
1 1	Discussions of Negotiation	FUSE	15 min.		
1 1	MEETINGS				
1 1					
1 1					
1 1					
1 1					
1 1					
1 1					
1 1					
1 1					
1 1					
1 1					
1 1					
1 1					

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Employee Signature M. Klein Date 10-21-02

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.7°

DATE OCT. 17, 2002

Shirley Thiers

Paul Terzi

Janette Dollosin

J. Sumner

Mandy Davies

M. J.

Dianne McLaughlin

Mary K. Korbach

Karen Waters Dr. Gyp

Gloria Conway

Brian Haley

~~Frank DeCoster~~

Frank DeCoster

Lynn Duditsky Taylor

Margaret White

Chloris G. H.

St. Marie Green

M. & Kalina

(Michelle Kalina  
Ralina)

Ned Albee

Audra Scott

### Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs.

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
10/17/02	Deans' Council Meeting And	SCFA	30 min		
1 / 1	Discussions of Negotiation	FUSE	10 min		
1 / 1	MEETINGS				
1 / 1					
1 / 1					
1 / 1					
1 / 1					
1 / 1					
1 / 1					
1 / 1					
1 / 1					
1 / 1					
1 / 1					
1 / 1					
1 / 1					

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature Mary Kleisen Date 10-18-02

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

DATE 10/24/02

Morgan Lopez Elizabeth Green  
Mark Davis Mellie Roberts

John Smith Greg Schneider  
Frank DeCosta Brian Blake

Nels Lopez Harold J. Conway \* Ray  
Will [unclear] [unclear] Cunningham

Michelle Kalina LONNIE SCHWENK  
Debra Munnally Mary Wollesen

Kan Walters Dwyer [unclear] \*  
Vicki Reader Sandra Scott

ROBERT WICKSBOM Lauren [unclear]  
Bin Terzi Anna Brazil

Steve McLaughlin Margaret Price  
Alma Jackson Mary Klenck

Janette Dolan M. W. Wilson  
Janet Thies Jana Suditsky

FLT  
Wk

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.3°

DATE 10/24/02

<u>Morgan Lepore</u>	<u>Stephanie Green</u>
<u>Maria Davis</u>	<u>Thelie Roberts</u>
<u>Jimmy Smith</u>	<u>Greg Schneider</u>
<u>Frank DeCout</u>	<u>Brian Haley</u>
<u>Nils Udys</u>	<u>Harold J. Conway</u>
<u>Michelle Kalina</u>	<u>Ray Cunningham</u>
<u>Debra Munnally</u>	<u>LONNIE SCHWENK</u>
<u>Karen Walters Duly</u>	<u>Mary Wollesen</u>
<u>Vicki Reader</u>	<u>David Scott</u>
<u>ROBERT WICKSTROM</u>	<u>Lauren Lee</u>
<u>Bruce Tuzi</u>	<u>Donna Craig</u>
<u>Diana McLaughlin</u>	<u>Maggie Price</u>
<u>Anne Jackson</u>	<u>Mary Kleinbach (Mary Kleinbach)</u>
<u>Shirley Dolan</u>	<u>M. W. Wilson (Woody Wilson)</u>
<u>Laurel Thues</u>	<u>Jana Dudutsky-Paper</u>

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs : SVCS

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
10/24/02	Deans' Council Meeting And	SCFA	10 min		
1 / 1	Discussions of Negotiation	FUSE	5 min		
1 / 1	MEETINGS				
1 / 1					
1 / 1					
1 / 1					
1 / 1					
1 / 1					
1 / 1					
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1 / 1					
1 / 1					
1 / 1					
1 / 1					

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature M. Heuser

Date 10-25-02

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.9°

DATE Nov. 7, 2002

Morgan Lynn

Nancy Klemoch

Laurel Thiers

Yvonne Dolbin

Ed DelConte

Kara Waters Dwyer

Steph A. J.

Suzanne Overman

Chelle G. Dwyer

Barlene Jackson

Mary Conway

J. Sumner

Michelle Kalina (Michelle Kalina)

Pat M.

Bill G. G.



**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs : SVCS

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
11/7/02	Deans' Council Meeting And	SCFA	30 min		
1/1	Discussions of Negotiation	FUSE	20 min		
1/1	MEETINGS				
1/1					
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**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature 11-7-02 Mary Kleinsch Date \_\_\_\_\_

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.5°

DATE NOV. 14, 2002

Morgan Ryan  
Chelle Kelly  
Monee Davis  
Zm Truji  
M. Phee  
M. Kalina  
Darlene Jackson  
J. Sumner  
Neal Alber  
Diane McLaughlin  
Delecia J. Nunnally  
Toni D'Antonio  
Stephanie Coover  
Steph A. J  
Landra Scott  
M M M M  
Maggie Klein Bich  
Laural Thiers  
Scott Pollock  
Frank DeCuster  
Karen Walters Polyo

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs : SVCS

916 781-0543

12mo/11mo/10mo/hrly  
Work year length

Dept. & Location #

Telephone #

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
11/14/02	Deans' Council Meeting And	SCFA	15 min		
1/1	Discussions of Negotiation	FUSE	15 min		
1/1	MEETINGS				
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Employee Signature Mary Kienzich Date 11-15-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.5°

DATE NOV. 21, 2002

Morgan Lynn

Laurel Thiers

Shelley Dollan

Mary Klemm

\* Woody Wilson

~~W. Wilson~~

Maggie Price

M. Kalina

Shelene Jackson

Jo Sumner

Clayton Conway

Sandra Scott

Mandy Davis

Keller [Signature]

Bill [Signature]

Karen Waters [Signature]

Stephanie [Signature]

Brian Haley

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
11/21/02	Deans' Council Meeting And	SCFA	10 min		
1/1	Discussions of Negotiation	FUSE	15 min		
1/1	MEETINGS				
1/1					
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Employee Signature Mary Kewzich Date 11-22-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.4°

DATE JAN. 23, 2003

<u>Morgan Rynning</u>	<u>Ann High</u>
<u>Lina Sudutsky - Gumpor</u>	<u>Shirley Dolson</u>
<u>Mandy Davis</u>	<u>Laurel Thiers</u>
<u>Gail [unclear]</u>	<u>Bill M. Tsuji</u>
<u>Jane McLaughlin</u>	
<u>Frank DeBoutier</u>	
<u>MA [unclear]</u>	
<u>Sandra Selt</u>	
<u>Neal Albee</u>	
<u>Alicia Munnally</u>	
<u>Jo Summer</u>	
<u>Sydney Greer</u>	
<u>[unclear]</u>	
<u>Karen Walters Durlap</u>	
<u>Brian Haley</u>	
<u>Karen Linde</u>	

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs.

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
1/23/03	Deans' Council Meeting And	SCFA	15 min		
1/1	Discussions of Negotiation	FUSE	5 min		
1/1	MEETINGS				
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Employee Signature Mary Klewsch Date 1-24-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

**Deans' Council**  
Thursday, January 30, 2003  
8:00 am to 12:00 Noon

Created  
Allbee +  
Martinez  
w/1.4<sup>o</sup>

***Fireside Room***

**A G E N D A**

**WORKSESSION**

1. Part-Time Instructor Issues, Evaluations and Related Forms N.Allbee/All

**INFORMATION / UPDATE**

2. Executive Council/Strategic Council Updates M.Lynn  
3. Negotiations Update R. Martinez  
4. Tahoe/Truckee Center Update F. DeCourten  
5. Calendar Committee Update D.McKnight/M.Davies

**DISCUSSION / ACTION**

6. Budget: Round #3 Reduction Discussion M.Lynn  
7. Other

**NOTE: Upcoming Joint OSC/DC/IIT Meeting Dates:**

February 20  
April 24

ad/DCAGNJan302003



1.40

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

DATE January 30, 2003

<u>Michelle Dollesin</u>	[	<u>Morgan Lynn</u>
<u>Sarah Thiers</u>		<u>Jane Ruditsky</u>
<u>Frank DeCouta</u>		<u>Mary Klenzsch</u>
<u>Brian Haley</u>		
<u>Maggie Price</u>		
<u>Arlene Johnson</u>		
<u>Steph D.J.</u>		
<u>Debra Munnally</u>		
<u>Diane McInight</u>		
<u>Karen Walters Dunlap</u>		
<u>Stephanie Green</u>		
<u>Neal Allen</u>		
<u>KAREN LINDE</u>		
<u>JAN HIGH</u>		
<u>K. Sumner</u>		
<u>MAURICE DODGES</u>		

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
1/30/03	Deans' Council Meeting And	SCFA	1hr/15 min		
1/1	Discussions of Negotiation	FUSE	5 min		
1/1	MEETINGS				
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Employee Signature M. Kleinbach Date 1-30-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

2.0°

DATE Feb. 6, 2003 (9-11:00 MTG Time)

Ami Duditsky Garfo

Neal Allbee

Jeanne Ireland

Maggie White

Christina Pollock

Barry Goyi

Spurl Thiers

J. Sundeen

Frank DeCoster

Mandy Davis

Barlene Jackson

Morgan Lynn

B. Haley

M. [Signature]

Steph A. J.

Karen Junde

Delecia Munnally

Andrew Scott

Chela G. [Signature]

Diane McLaughlin

Karen Watters Dunlop

Gregorie [Signature]

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs : SWS

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
2/6/03	Deans' Council Meeting And	SCFA	15 min		
1/1	Discussions of Negotiation	FUSE	15 min		
1/1	MEETINGS				
1/1					
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Employee Signature Mary Kewenoh Date 2-7-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

1.0

DATE FEB. 6, 2003 8am - 9am

Jamie Thiers

Frank DeCourto

Barbara Jackson

Britney

Steph D.

Debra Munnally

Karen Lunde

Diane McLaughlin

Karen Waters Dunlop

Stephanie Green

Neal Albee

Maggie White

Pat Long

J. Sumner

Mandy Daines

Michelle Lafont

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-03

Employee Name: Dean's Council WorkSession Exact Position Title: \_\_\_\_\_  
 EP: S Telephone #: X2543 Work year length: 12mo/11mo/10mo/hrly  
 Dept. & Location #: \_\_\_\_\_

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
2/6/03	NEGOTIATIONS WorkSession	SCFA	60min		
1/1	ON PART-TIME and Full-Time				
1/1	Evaluations				
1/1					
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Employee Signature: Mary Kleusad Date: 2-7-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.6

DATE FEBRUARY 13, 2003

organ Lynn)

Margau Ojeda  
Marg Kleenich  
Dany Smith  
Laural Thiers  
Brian Haley  
Kegan Watters Durkay  
Frank DeCurt  
Aimee Jackson  
Diane McLoughlin  
~~Stephanie~~  
Stephanie Curran  
Delecia Munnally  
Neal Albee  
Lo Sumner  
Sandra Scott  
Maggie White

John Hill  
Karen Linder  
Bill Krizi  
Mary Davis

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
2/13/03	Deans' Council Meeting And	SCFA	30 Min		
1/1	Discussions of Negotiation	FUSE	5 Min		
1/1	MEETINGS				
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Employee Signature Mary Kleinbach Date 2-14-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_



Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

DATE FEB. 20, 2003

Morgan Ryan	<del>Steph...</del>	
Mary Klein	Phil Yorde *	Phil Yorde
A. Indrsky	Jeff Snyder	
M. Woodrow Wilson	Phil Yorde	
Yvonne G. W...	Karen Watts Dulys	mandy Davies
Dawrence Lee	Phil Yorde *	mandy Davies
Debra Munnally	M. Munnally	
Michelle Helwick	Alicia M. Fries	
Joy Schneider	Laurel A. Thiers	
* Carl Smalley	Craig Smalley	
Karen Lunde	Mary Welles	
James High	Vicki Reader	
Stephanie Guzman	Robert Wickstrom *	Robert Wickstrom
Jo Sumner	Ray Cunningham *	Ray Cunningham
Berlene A. Jackson	Melinda Robert	
Sandra Scott		

Verifying Signatures  
 For Deans' Council Activities  
 Time Log for Mandated Costs of  
 961/75 COLLECTIVE BARGAINING

0.8

DATE FEB. 20, 2003

	Morgan Lynn	<del>Steph A. J.</del>	
	Mary Klein	Ed Val	* ?
	A. Indutsky	Steph A. J.	*
copy (?) * Wilson	M. Woodrow Wilson	Ed Val	
	Geeler, G. W.	Karen Watts	Dulys
	Laurence Lee	Ed Val	* ?
	Debra Munnich	M. Munnich	
* ?	Sue B. Melnick	Aileen M. Green	
	Jeg Schneider	Laurel A. Thiers	
* ?	Carl Bradley	Spotts DeFon	
	Karen Lunde	Mary Welles	
	James High	Vicki Reader	
	Stephanie Guevara	Steph A. J.	* ?
	Jo Sumner	Steph A. J.	* ?
	Bulene D. J. J.	Millie Roberts	Millie Roberts
	Sandra Scott		
	Dary Smith		

**Individual Activities Time Log for Mandated Costs of  
96175 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs.

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
2/20/03	Deans' Council Meeting And	SCFA	30 min		
1/1	Discussions of Negotiation	FUSE	15 min		
1/1	MEETINGS				
1/1					
1/1					
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Employee Signature Mary Kleinzel Date 2-21-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

Verifying Signatures  
 For Deans' Council Activities  
 Time Log for Mandated Costs of  
 961/75 COLLECTIVE BARGAINING

D.9

DATE FEBRUARY 27, 2003

<u>Morgan Lynn</u>	<u>Frank DeSauter</u>
<u>Mardy Davies</u>	<u>Shirley Dollwin (Ninelle Dollwin)</u>
<u>Michelle G. [unclear]</u>	<u>Laurel Thies</u>
<u>Jana Rudatsky [unclear]</u>	<u>Dan Smith</u>
<u>Bruce [unclear]</u>	<u>Nicki Reader</u>
<u>Jon High</u>	<u>Robert Wickstrom</u>
<u>Karen Linde</u>	
<u>Jennifer Scott</u>	
<u>Diane McLaughlin</u>	
<u>Jo Sumner</u>	
<u>Delecia Munnally</u>	
<u>[unclear signature]</u>	
<u>[unclear signature]</u>	
<u>[unclear signature]</u>	
<u>Patricia Jackson</u>	
<u>Karen Walters Duntap</u>	

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs = SVCS

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
2/27/03	Deans' Council Meeting And	SCFA	30 Min		
1/1	Discussions of Negotiation	FUSE	20 Min		
1/1	MEETINGS				
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Employee Signature Mary Klenzsch

Date 3-13-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

1.3

DATE March 6, 2003

Laurel Thiers	Jim Kozis
Margaret Lee	Ann Tucker by John
Jo Haley	Deanne McIntosh
Karen Watters Dunn by	Morgan
Barlene Jackson	Mary Klenoch
Stephanie Guern	
<del>Stephanie Guern</del>	
Neal Albee	
Delecia Munnally	
Christie Schaffli	
Debbie O'Byrne	
Allyne Ireland	
W. M. [unclear]	
Sandra Scott	
Jan High	
Karen Lunde	

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs : SVCS

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
3/6/03	Deans' Council Meeting And	SCFA	1 Hr		
1/1	Discussions of Negotiation	FUSE	15 min		
1/1	MEETINGS				
1/1					
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Employee Signature M Kleinbach Date 3-7-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

0.00 - 4.00  
+

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

1.0

8am Worksession

DATE 3-6-03

Jeanne Ireland

MM May

Angela Scott

Don High

Karen Linde

Patricia Benji

Anna Gudets (K. Kelly)

Dolly GREEN

Jane McEnright

Mandy Lewis



**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
3/6/03	Deans' Council Meeting And	SCFA	1 hr		
1/1	Discussions of Negotiation	FUSE	0		
1/1	MEETINGS				
1/1	SPECIFIC WORKSESSION by				
1/1	Deans' Council on				
1/1	Evaluation Process				
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Employee Signature M Klewadi Date 3-7-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

1.0

DATE 3-13-03

Margaret Lynn

Mary Klenz

Mandy Deane

Bill Buzi

Maggie Shea

Esperance Gueson

Bill White

S. Dudotsky

Christina Collins

Jan High

Karen Jorde

Delecia Munnally

Karen Walker Dunlop

Frank DeCoursey

Laurel Thiers

Diane McEnright

Jo Sumner

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs.

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
3/13/03	Deans' Council Meeting And	SCFA	40 min		
1 1	Discussions of Negotiation	FUSE	15 min		
1 1	MEETINGS				
1 1					
1 1					
1 1					
1 1					
1 1					
1 1					
1 1					
1 1					
1 1					
1 1					
1 1					
1 1					

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature Marg Kleinbach Date 3-13-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs - SACS

916 781-0543

12mo/11mo/10mo/hrly  
Work year length

Dept. & Location #

Telephone #

0.5°

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
3/20/03	Deans' Council Meeting and	SCFA	25 <sup>0</sup> minutes		
1/1	Discussions of negotiation	FUSE			
1/1	meetings				
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					

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Employee Signature Marg Klensch Date 3-27-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.5°

DATE 3-20-03 8:30 am - 8:55

<u>Annitta Lollin</u>	<u>Bill Trujillo</u>
<u>Laurel Thiers</u>	<u>Brian Haley</u>
<u>Frank DeCoster</u>	<u>M. M. M.</u>
<u>Karen Walters Dunlap</u>	<u>Dave McLaughlin</u>
<u>Barbara D. Jackson</u>	<u>Mary Klenz</u>
<u>Julie Land</u>	
<u>Steph A. J.</u>	
<u>Stephanie Guerra</u>	
<u>Debecca J. Munnally</u>	
<u>Karen Lunde</u>	
<u>Jaw High</u>	
<u>Julie G. M.</u>	
<u>J. Tarditsky</u>	
<u>Neal Allbee</u>	
<u>Jo Sumner</u>	
<u>Nancy Davis</u>	

### Verifying Signatures For Deans' Council Activities Time Log for Mandated Costs of 961/75 COLLECTIVE BARGAINING

DATE: APRIL 3, 2003

Roy  
Hannington \*

<del>Morgan Lynn</del>	<del>John High</del>
<del>Barbara Gorman</del>	<del>Lolly McPhee</del>
<del>Will Matney</del>	<del>Joe Belwick</del>
<del>Lorrie Schwab</del>	<del>Karen Watts Dwyer</del>
<del>Grady Jones</del>	<del>Frank DeGrueter</del>
<del>Millie Roberts</del>	<del>Brian Hally</del>
<del>Vase Michaels</del>	<del>Smith R. Pallen</del>
<del>Jay Sanders</del>	<del>Laurel Thiers</del>
<del>Andrea Scott</del>	<del>Klay Kleinrich</del>
<del>Dawn Smith</del>	<del>W. Craig Smalley</del>
<del>J. Roberts by Gaff</del>	<del>Jo Surriner</del>
<del>Anna Bray</del>	<del>Lawrence Lee</del>
<del>Jennifer Mackery</del>	<del>Woody Wilson</del>
<del> Vicki L. Reader</del>	<del>Sandra Scott</del>
<del>Robert White</del>	<del>Phil Yorke</del>
<del>Doug Schneider</del>	<del>Diane McKnight</del>
<del>Michelle G. G.</del>	<del>Bill Tsigi</del>
<del>Alexia Munnally</del>	<del>Wylene Jackson</del>
<del>Karen Lunde</del>	
<del>Neal Allbee</del>	

These manage  
ae/mandcostlog  
attended but  
didn't get the  
opportunity

**Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING**

0.5

DATE: APRIL 3, 2003

<u>Morgan Lynn</u>	<u>John High</u>
<u>Byronne Green</u>	<u>Dolly McKeen</u>
<u>Will Maty</u>	<u>Sue Belnick *</u>
<u>Lenny Schuster</u>	<u>Karen Watts Darlap</u>
? * <u>[Signature]</u>	<u>Frank DeGrueter</u>
<u>Maury Jones</u>	<u>Brian Haley</u>
<u>Millie Roberts</u>	<u>Smith R. Pollin</u>
* <u>Sue Michaels</u>	<u>Laurel Thiers</u>
* <u>Jay Sanders</u>	<u>Mary Klemish</u>
<u>Sandra Scott</u>	* <u>Craig Smalley</u>
<u>Deryn Smith</u>	<u>Jo Sumner</u>
<u>J. Sumner</u>	<u>Lawrence Lee</u>
<u>Anna Bray</u>	<u>Woody Wilson</u>
* <u>Jennifer Mackey</u>	<u>Sandra Scott</u>
<u>Ticki L. Reader</u>	* <u>Phil Yorde</u>
<u>Ralene Wilton</u>	<u>Diane McKnight</u>
<u>Doug Schneider</u>	<u>Bill Tsige</u>
<u>Cheryl [Signature]</u>	<u>Darlene Jackson</u>
<u>Delecia Munnally</u>	
<u>Karen Lunde</u>	
<u>Neal Albee</u>	

These managers  
ae/mandcostlog  
attended but  
didn't get the  
opportunity  
to sign!

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs.

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
4/3/03	Deans' Council Meeting And	SCFA	20 min.		
4/3/03	Discussions of Negotiation	FUSE	5 min		
1/1	MEETINGS				
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature Mary Kleinbach Date 4-3-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_



Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.7°

DATE APRIL 10, 2003

Morgan Lynn  
Bibi Buzi  
Ame Andrews  
Diane McLaughlin  
Maggie Pierce  
Karin Ende  
Jan Hilt  
Vivette Dolan  
~~\_\_\_\_\_~~  
Celia Epting Davis  
Jo Sumner  
Dawn Smith  
Frank DeCorte  
Karen Walters Dunlap  
Dorene Jackson  
Eggarie Thomas

Yvonne Thuro  
Mary Klemm

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs      916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
4/10/03	Deans' Council Meeting And	SCFA	30min		
4/10/03	Discussions of Negotiation	FUSE	10min		
1/1	MEETINGS				
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					

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Employee Signature Mary Klemisch      Date 4-10-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

1.0

DATE APRIL 24, 2003

Morgan Lynn

May Klemm

Money Shier

Maggie Kute

Bill Tsuji

Dianne Melanright

Jo Sumner

Shirley Dolhin

Godwin Twa

~~Joseph D. J.~~

Debra J. Nunnally

Will [Signature]

Erin Haley

Karen Waters Dunlop

Frank DeBente

\* John F. Volk

Karen Jude

**Individual Activities Time Log for Mandated Costs of  
96175 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs : SVCS

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
4/24/03	Deans' Council Meeting And	SCFA	40M		
1/1	Discussions of Negotiation	FUSE	15M		
1/1	MEETINGS				
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					

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Employee Signature Mary Klenzsch Date 4-25-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.6

DATE MAY 8, 2003

Morgan Ryan Debra Munnally  
Wendy Duley Mary Hollis  
J. Inducts by Baker  
Neal Allbee  
Frank D. Bunker  
Karen Walter Dunlop  
Darlene Jackson  
Michelle Dollesin  
Stephanie Gorman  
~~Steph D~~  
Dan Smith  
Sandra Scott  
\* John F. Volek  
Bill [unclear]  
Jo Sumner  
Jane McLoughlin

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs : Svcs -

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
5/8/03	Deans' Council Meeting And	SCFA	20 min		
1/1	Discussions of Negotiation	FUSE	15 min		
1/1	MEETINGS				
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					

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Employee Signature Mary Klenz Date 5-8-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: SIERRA COLLEGE Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached) \_\_\_\_\_ Exact Position Title \_\_\_\_\_  
Ed. Programs & Svcs 916 781-0543 12mo/11mo/10mo/hrly  
 Dept. & Location # \_\_\_\_\_ Telephone # \_\_\_\_\_ Work year length \_\_\_\_\_

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
5/22/03	Deans' Council Meeting And	SCFA	45 min		
1/1	Discussions of Negotiation	FUSE	15 min		
1/1	MEETINGS				
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					

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Employee Signature Mary Klein Date 5-22-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

DATE May 22, 2003

Morgan Lynn  
Laurel Thiers

Karen Walters Dinsley  
Frank DeCorte  
Erin Haley

\* John Volek

~~Step 10~~  
Delecia J. Munnally

Nancy Davis  
Brian Curran

Neal Allbee

Jo Sumner

Michelle L. Ford

M. May  
A. Suditsky



Sierra Joint Community College District  
 Collective Bargaining  
 F/Y 2002-2003  
 Schedule 3  
 RE : Leland, Jeanne's Employee Time Log

Date	Component 3 Contract Negotiations			Component 6 Contract Administration	
	NP Certificated	NP Classified	NT Certificated	AI	Contract Admin.
8/16/02		4.00			
8/22/02		2.00			
8/22/02	0.50		2.00		
8/22/02	1.00				
8/29/02	0.50				
8/29/02	0.50				
8/30/02	2.00				
8/30/02	1.00	1.00			
9/4/02	1.00	1.00			
9/5/02	0.50				
9/5/02	0.50				
9/6/02	4.00				
9/9/02		0.50			
9/10/02		3.00			
9/12/02	1.00	1.00			
9/12/02	2.00				
9/12/02	0.50				
9/13/02	4.00				
9/17/02		2.00			
9/20/02	1.70	1.70			
9/20/02		1.00			
9/30/02		0.50			
9/31/02		4.00			
10/3/02		1.00			
10/3/02	0.50				
10/4/02		4.00			
10/4/02	3.00				
10/11/02	2.00				
10/11/02		1.00			
10/14/02		0.50			
10/15/02					4.00
10/16/02					5.00
10/17/02					5.00
10/18/02					5.00
10/21/02		2.00			
10/21/02	2.00	2.00			
10/21/02		0.50			
10/23/02		1.00			
10/24/02	2.00	2.00			
10/24/02	0.50				
10/25/02	4.00				
10/28/02		0.50			
10/29/02		3.00			
10/29/02	1.00	1.00			
10/31/02		1.00			
10/31/02	0.50				
11/1/02	2.00				
11/5/02		1.00			
11/5/02	1.00	1.00			
11/12/02		2.00			
11/18/02		0.50			
11/21/02	1.00				
11/21/02	1.00				
11/22/02		1.50			
11/22/02	0.50	0.50			
11/22/02		1.00			
11/22/02		0.50			
11/22/02		1.00			
11/22/02	2.00				

Sierra Joint Community College District  
Collective Bargaining  
FY 2002-2003  
Schedule 3  
RE : Leland, Jeanne's Employee Time Log

Date	Component 3 Contract Negotiations			Component 6 Contract Administration	
	NP Certificated	NP Classified	NT Certificated	AI	Contract Admin.
11/26/02		4.00			
11/26/02		1.00			
12/3/02	2.50				
12/3/02		1.00			
12/3/02		2.00			
12/3/02	1.00	1.00			
12/4/02	1.00	1.00			
12/4/02	1.00				
12/4/02		2.00			
12/4/02	2.00				
12/5/02		4.00			
12/6/02	4.00				
12/9/02		0.50			
12/12/02	0.50				
12/12/02			3.00		
12/13/02				2.00	
12/16/02		2.00			
12/16/02				1.50	
12/19/02	0.50				
12/19/02			3.00		
12/19/02			3.00		
1/22/03		1.00			
1/22/03				1.00	
1/22/03		4.00			
1/23/03	2.00				
1/23/03		2.00			
1/23/03				2.00	
1/24/03				2.00	
1/24/03				1.00	
1/24/03				3.00	
1/27/03				2.50	
1/27/03	2.00				
1/29/03		4.00			
1/29/03		3.00			
1/30/03	2.50				
1/30/03		2.00			
1/30/03	0.50				
1/31/03		1.50			
1/31/03				1.00	
1/31/03	3.00				
2/3/03		7.00			
2/5/03		4.00			
2/7/03	1.50	1.50			
2/6/03	0.50				
2/10/03	1.00				
2/11/03				1.00	
2/11/03	3.00				
2/11/03	2.00				
2/12/03		1.50			
2/13/03		3.00			
2/18/03	3.50				
2/20/03	2.00		2.50		
2/21/03	2.00				
2/21/03				1.00	
2/24/03		3.00			
2/24/03		2.00			
2/25/03	4.00	4.00			
2/27/03	2.00	2.00			
3/4/03	1.50				
3/4/03	1.00	1.00			

Sierra Joint Community College District  
 Collective Bargaining  
 FY 2002-2003  
 Schedule 3  
 RE : Leland, Jeanne's Employee Time Log

Date	Component 3 Contract Negotiations			Component 6 Contract Administration	
	NP Certificated	NP Classified	NT Certificated	AI	Contract Admin.
3/5/03	0.50	0.50			
3/6/03	4.00				
3/11/03	4.00				
3/12/03		3.50			
3/13/03		3.50			
3/14/03	2.00	2.00			
3/17/03		6.00			
3/18/03	4.00	4.00			
3/19/03		8.00			
3/20/03		2.00			
3/20/03	3.00				
3/21/03	7.00				
3/25/03	3.00	3.00			
3/31/03	1.00	1.00			
4/1/03		1.00			
4/1/03		2.50			
4/3/03	2.00				
4/3/03	1.00				
4/4/03		2.00			
4/8/03	3.00				
4/8/03		2.00			
4/10/03	0.50				
4/14/03	2.50				
4/14/03	1.50	1.50			
4/15/03	4.00	4.00			
4/16/03	2.00	2.00			
4/21/03				0.50	
4/25/03		4.50			
4/28/03	3.00				
4/28/03		2.00			
5/2/03		1.00			
5/5/03		1.00			
5/6/03	0.50	0.50			
5/6/03				4.00	
5/7/03	3.00				
5/13/03		1.00			
5/14/03		1.00			
5/14/03	2.00				
5/14/03				1.00	
5/15/03		1.00			
5/20/03				1.00	
5/21/03				2.00	
5/21/03		2.00			
5/22/03		2.00			
5/22/03	0.50				
5/26/03				2.50	
5/27/03	1.00				
6/9/03		2.00			
6/9/03	1.00				
6/10/03		2.00			
6/12/03	4.00				
6/17/03	1.00	1.00			
6/17/03	1.00	1.00			
6/18/03	1.00	1.00			
6/19/03		4.00			
<b>Totals</b>	<b>153.20</b>	<b>190.70</b>	<b>13.50</b>	<b>29.00</b>	<b>19.00</b>

Key	NP	Negotiation Preparation
	NT	At-Table Negotiations
	AI	Contract Interpretations

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College

Fiscal Year: 2001-2002

Jeanne Leland  
Employee Name

Personnel/Classification Coordinator and  
Exact Position Title Special Projects

Human Resources  
Dept. & Location #

(916) 789-2947  
Telephone #

12mo/11mo/10mo/hrly  
Work year length

	Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
*	8 / 6 / 02	PERB Meeting - Torben Eriksen	FUSE	3 1/2	input und	actually
	8 / 14 / 02	FUSE Negotiations	FUSE	3 1/2	already in Schedule 1 B	
	8 / 15 / 02	FUSE Negotiations	FUSE	3 1/2	"	
NP	8 / 16 / 02	Processed FUSE recollections	FUSE	4		
	8 / 19 / 02	FUSE Negotiations	FUSE	3 1/2	already in Schedule 1 B	
NP	8 / 22 / 02	Processed FUSE recollections	FUSE	2		
NP	8 / 22 / 02	SCFA Prep.	SCFA	1/2		
NT	8 / 22 / 02	SCFA Negotiations	SCFA	2		
NP	8 / 22 / 02	Debrief with Kevin Ramirez RE: SCFA	SCFA	1		
NP	8 / 29 / 02	SCFA Prep.	SCFA	1/2		
	8 / 29 / 02	SCFA Negotiations	SCFA	2 1/2	already in Schedule 1 B	
NP	8 / 29 / 02	Debrief with Kevin Ramirez RE: SCFA	SCFA	1/2		
NP	8 / 30 / 02	Process recollections for SCFA	SCFA	2		
NP	8 / 30 / 02	Answer emails & phone calls	SCFA EUSE	2 ← 1 hr		
NP	9 / 4 / 02	Meet with Ron Martinez & Doug Smith	SCFA FUSE	2 ← ready unit		

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature [Signature] Date 11/22/02

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

\*Smith: 1<sup>o</sup> for FUSE prep on 11/1  
Smith already claimed  
1<sup>o</sup> for SCFA prep on 11/1  
log

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College

Fiscal Year: 2001-2002

Jeanne Leland  
Employee Name

Personnel/Classification Coordinator and  
Exact Position Title Special Projects

Human Resources  
Dept. & Location #

(916) 789-2947  
Telephone #

12mo/11mo/10mo/hrly  
Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
NP 9/ 5 / 02	SCFA Prep.	SCFA	1/2		
9/ 5 / 02	SCFA Negotiations	SCFA	2 1/2	already in Schedule 1B	
NP 9/ 5 / 02	Debrief with Kevin Ramirez RE: SCFA	SCFA	1/2		
NP 9/ 6 / 02	Process recollections for SCFA	SCFA	4		
NP 9/ 9 / 02	FUSE prep.	FUSE	1/2		
9/ 9 / 02	FUSE Negotiations	FUSE	3 1/2	already in Schedule 1B	
NP 9/10 / 02	Process FUSE recollections	FUSE	3		
NP 9/12 / 02	Answer emails & phones messages	FUSE	2 1/2		
NP 9/ 12/ 02	SCFA prep.	SCFA SCFA	2		
9/ 12/ 02	SCFA Negotiations	SCFA	2 1/2	already in Schedule 1B	
NP 9/ 12/ 02	Debrief with Kevin Ramirez RE: SCFA	SCFA	1/2		
NP 9/ 13/ 02	Process SCFA re collections	SCFA	4		
NP 9/ 16/ 02	Joint Labor Management Meeting ✓	SCFA	2 1/2		
NP 9/ 17/ 02	Joint Labor Managment recollections ✓	FUSE SCFA	2		
NP 9/ 17/ 02	Conversion Workgroup	FUSE FUSE	2		

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature [Signature] Date 11/22/02

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College

Fiscal Year: 2001-2002

Jeanne Leland  
Employee Name

Personnel/Classification Coordinator and  
Exact Position Title Special Projects

Human Resources  
Dept. & Location #

(916) 789-2947  
Telephone #

12mo/11mo/10mo/hrly  
Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
9/19/02	Joint Labor Management Meeting	SCFA FUSE	2 1/2	already on schedule	
9/19/02	SCFA Negotiations	SCFA	1 1/2	already on schedule	
NP 9/20/02	Process SCFA & Joint Labor Mgmt.	SCFA FUSE	3 1/2	(1, 7 <sup>th</sup> ed)	
NP 9/20/02	Lunch to discuss Conversion Recollections - Michaels	FUSE	1		
NP 9/30/02	Paulson & Martinez FUSE prep.	FUSE	1/2		
9/30/02	FUSE Negotiations	FUSE	3 1/2	already in schedule 1B	
NP 9/31/02	Process FUSE recollections and Sunshine List	FUSE	4		
NP 10 3/02	Schedule Conversion interviews	FUSE	1		
NP 10 3/02	SCFA prep.	SCFA	1/2		
10 3/02	SCFA Negotiations	SCFA	2 1/2	already claimed	
NP 10 4 /02	Reorg retreat	FUSE	4		
NP 10 4 /02	Process SCFA recollections	SCFA	3		
NP 10 10/02	Part-Time faculty workgroup	SCFA	3	already claimed	
NP 10 11/02	Part-Time faculty workgroup recollections	SCFA	2		
NP 10 11/02	Schedule Conversion interviews	FUSE	1		

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Employee Signature Jeanne Leland Date 11/22/02

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College

Fiscal Year: 2001-2002

Jeanne Leland  
Employee Name

Personnel/Classification Coordinator and  
Exact Position Title Special Projects

Human Resources

(916) 789-2947  
Telephone #

12mo/11mo/10mo/hrly  
Work year length

Dept. & Location #

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
NP 10/14/02	FUSE prep.	FUSE	1/2		
10/14/02	FUSE Negotiations	FUSE	3 1/2	already claimed	
10/15/02	ACHRO Conference - San Diego	FUSE SCFA	4		
10/16/02	ACHRO Conference - San Diego	"	5		
10/17/02	ACHRO Conference - San Diego	"	5		
10/18/02	ACHRO Conference - San Diego	"	5		
NP 10/21/02	FUSE recollections	FUSE	2		
NP 10/21/02	Answer emails & phone messages	FUSE SCFA	4	2 <sup>ea</sup>	
NP 10/21/02	FUSE prep.	FUSE	1/2		
10/21/02	FUSE Negotiations	FUSE	3 1/2	already claimed	
NP 10/23/02	Part-Time Faculty Workgroup	SCFA	2	already claimed	
NP 10/23/02	Meet with Jory Hadsell	FUSE	1		
NP 10/24/02	Research faculty parity issues;	SCFA			
/ /	Schedule conversion appointments;	FUSE			
/ /	Search www	FUSE SCFA	4	2 <sup>ea</sup>	

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**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature *Jeanne Leland* Date 11/22/02

If you have any questions please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College

Fiscal Year: 2001-2002

Jeanne Leland  
Employee Name

Personnel/Classification Coordinator and  
Exact Position Title Special Projects

Human Resources  
Dept. & Location #

(916) 789-2947  
Telephone #

12mo/11mo/10mo/hrly  
Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
NP 10/24 / 02	SCFA prep.	SCFA	1/2		
10/24 / 02	SCFA Negotiations	SCFA	2 1/2	<i>already claimed</i>	
NP 10/25 / 02	Part-time faculty workgroup recollections	SCFA	4		
NP 10/28 / 02	FUSE prep.	FUSE	1/2		
10/28 / 02	FUSE Negotiations	FUSE	3 1/2	<i>already claimed</i>	
NP 10/29 / 02	FUSE Recollections	FUSE	3		
NP 10/29 / 02	VEBA Meeting	FUSE SCFA	2 (1 ea)		
NP 10/31 / 02	PERB follow-up	FUSE	1		
NP 10/31 / 02	SCFA prep.	SCFA	1/2		
10/31 / 02	SCFA Negotiations	SCFA	3	<i>already claimed</i>	
NP 11/ 1 / 02	Process SCFA Recollections	SCFA	2		
NP 11/ 5 / 02	Schedule Conversion Interviews	FUSE	1		
11/ 5 / 02	Answer emails & phone messages	FUSE SCFA	2 (1 ea)		
11/12 / 02	Conversion Planning	FUSE	2		
11/18 / 02	FUSE prep.	FUSE	1/2		

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Employee Signature *Jeanne Leland* Date 11/22/02

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_



## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College

Fiscal Year: 2001-2002

Jeanne Leland  
Employee Name

Personnel/Classification Coordinator and  
Exact Position Title Special Projects

Human Resources  
Dept. & Location #

(916) 789-2947  
Telephone #

12mo/11mo/10mo/hrly  
Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
11/18/02	FUSE Negotiations	FUSE	3 1/2	already claimed	
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Employee Signature Jeanne Leland Date 11/22/02

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Jeanne Leland Personnel/Classification Coordinator and Special Projects  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 789-2947 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
11/21/02	Recovery mandated costs	SCFA/FUSE	1 hr.	MRP claim	
11/21/02	SCFA Prep - Conversion planning	SCFA	1 hr.		
11/21/02	Met with John Bukey, Doug Smith & Ron Martinez	SCFA	1 hr.		
11/21/02	SCFA Negotiations	SCFA	2 hrs.	already claimed	
11/22/02	Work on FUSE recollections	FUSE	1 1/2 hrs.		
11/22/02	Work on correspondence RE: negotiations	SCFA/FUSE	1 hr.	5 ea	
11/22/02	Work on FUSE recollections	FUSE	1 hr.		
11/22/02	Met with Doug Smith & Ron Martinez	FUSE	1/2 hr.		
11/22/02	FUSE recollections ✓	FUSE	1 hr.		
11/22/02	SCFA recollections ✓	SCFA	2 hrs.		
11/25/02	FUSE Negotiations	FUSE	4 hrs.	already claimed	
11/26/02	FUSE recollections	FUSE	4 hrs.		
11/26/02	Work on contract issues for FUSE	FUSE	1 hr.		
12/2/02	FUSE Negotiations	FUSE	4 hrs.	already claimed	
12/3/02	SCFA prep	SCFA	2 1/2 hrs.		
12/3/02	Work on conversion	FUSE	1 hr.		
12/3/02	Work on FUSE recollections	FUSE	2 hrs.		
12/3/02	Work on reorg.	FUSE/SCFA	2 hrs.	1 ea	
12/4/02	Work on reorg.	FUSE/SCFA	2 hrs.	1 ea	
12/4/02	Work on job descriptions with Neal Allbee	SCFA	1 hr.		
12/4/02	Work on FUSE recollections	FUSE	2 hrs.		
12/4/02	SCFA prep	SCFA	2 hrs.		
12/5/02	FUSE formula calculations	FUSE	4 hrs.		

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Employee signature: Jeanne Leland Date: 1/24/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Jeanne Leland Personnel/Classification Coordinator and Special Projects  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 789-2947 12 mon./11 mon./10 mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
12/5/02	Joint Labor Management meeting	JLMC	1 1/2 hrs.	already claimed	
12/5/02	SCFA Negotiations	SCFA	3 hrs.	already claimed	
12/6/02	Work on JLMC & SCFA recollections	JLMC/SCFA	4 hrs.		
12/9/02	Meet with Doug Smith & Ron Martinez both claimed	FUSE	1/2 hr.		
12/9/02	FUSE Negotiations by Martinez	FUSE	3 hrs.	already claimed	
12/12/02	Meet with Doug Smith & Ron Martinez	SCFA	1/2 hr.		
12/12/02	SCFA Negotiations ✓	SCFA	3 hrs.		
12/13/02	Work on JLM side letters	JLMC	2 hrs.		
12/16/02	Work on FUSE recollections ✓	FUSE	2 hrs.		
12/16/02	Work on JLM side letters	JLMC	1 1/2 hrs.		
12/19/02	Meet with Doug Smith & Ron Martinez	SCFA	1/2 hr.		
12/19/02	SCFA Negotiations ✓	SCFA	3 hrs.		
12/19/02	SCFA Negotiations ✓	SCFA	3 hrs.		
1/17/03	FUSE Retreat	FUSE	7 hrs.	already claimed	

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Employee signature: Jeanne Leland Date: 1/21/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003


Jeanne Leland Personnel/Classification Coordinator and Special Projects  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 789-2947 12 mon/11 mon./10mon./hrly  
Dept. & Location Telephone #

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Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
1/21/03	FUSE Retreat recollections	FUSE	8 hrs.	already in	
1/22/03	FUSE seniority list	FUSE	1 hr.		
1/22/03	JLMC side letters	JLMC	1 hr.		
1/22/03	Conversion scheduling	FUSE	4 hrs.		
1/23/03	Prepared for JLMC & SCFA meetings	JLMC/SCFA	2 hrs.		
1/23/03	Worked on HR reorg	FUSE	2 hrs.		
1/23/03	JLMC meeting	JLMC	1 1/2 hrs.	already claimed	sched 2
1/23/03	SCFA Negotiations	SCFA	2 hrs.	already claimed	
1/23/03	JLMC recollections	JLMC	2 hrs.		
1/24/03	Conversion scheduling	FUSE	2 hrs.		
1/24/03	JLMC side letters	JLMC	1 hr.		
1/24/03	JLMC recollections	JLMC	3 hrs.		
1/27/03	Ed. Code research - collective bargaining	JLMC	2 1/2 hrs.		
1/27/03	SCFA recollections	SCFA	2 hrs.		
1/29/03	Worked on conversion	FUSE	4 hrs.		
1/29/03	FUSE research	FUSE	3 hrs.		
1/30/03	SCFA prep	SCFA	2 1/2 hrs.		
1/30/03	Conversion planning	FUSE	2 hrs.		
1/30/03	Met with Ron Martinez & Doug Smith	SCFA	1/2 hr.	both claimed by Martinez	
1/30/03	SCFA negotiations	SCFA	3 1/2 hr.	already claimed	
1/31/03	Conversion workgroup	FUSE	1 1/2 hrs.		
1/31/03	JLMC side letters	JLMC	1 hr.		
1/31/03	SCFA recollections	SCFA	3 hrs.		

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Employee signature:  Date: 2/11/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Jeanne Leland Personnel/Classification Coordinator and Special Projects  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 789-2947 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
2/3/03	Reviewed FUSE contract	FUSE	7 hrs.		
2/5/03	FUSE recollections	FUSE	4 hrs.		
2/7/03	Attended Dean's Council to discuss FUSE job tracks, temp count, PT faculty count, live scan	FUSE/SCFA	3 hrs.		
2/6/03	Met with Doug Smith & Ron Martinez	SCFA	1/2 hr.		
2/6/03	SCFA Negotiations	SCFA	2 1/2 hrs.		already claimed
2/7/03	PT parity meeting with Doug Smith & Ron Martinez	SCFA	1/2 hr.		
2/10/03	Met with Robert Wickstrom RE: PT parity	SCFA	1 hr.		
2/10/03	FUSE Negotiations	FUSE	5 hrs.		already claimed

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Employee signature:  Date: 2/11/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Jeanne Leland Personnel/Classification Coordinator and Special Projects  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 789-2947 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
2/11/03	Meeting to draft JLMC side letter.	SCFA/FUSE	1 hr.		
2/11/03	Work on parity report	SCFA	3 hrs.		
2/11/03	SCFA Recollections	SCFA	2 hrs.		
2/12/03	Work on Reorganizations	FUSE	1 1/2 hrs.		
2/13/03	Work on FUSE Recollections	FUSE	3 hrs.		
2/13/03	SCFA Negotiations /	SCFA	3 1/2 hrs.		already claimed
2/18/03	SFCA Recollections	SCFA	3 1/2 hrs.		
2/20/03	SCFA Preparation and SCFA negotiations ✓	SCFA	4 1/2 hrs.		
2/21/03	SCFA Recollections	SCFA	2 hrs.		
2/21/03	Meeting with Ron Martinez and Shari Newman Re: AB500 temps and contracting out.	FUSE	1 hrs.		
2/24/03	Work with Vance on Conversion	FUSE	3 hrs.		
2/24/03	Work with w/Ron Martinez and John Bukey on Article 21 & Article 2.	FUSE	2 hrs.		
2/25/03	Work with Vance on job tracks. Work on both FUSE & SCFA negotiations; Article 29, retiree spreadsheets and negotiations.	SCFA/FUSE	8 hrs.	1 <sup>ea</sup>	
2/27/03	Prepare materials for Exec. Committee Mtg.	SCFA/FUSE	4 hrs.	2 <sup>ea</sup>	
2/27/03	JLMC Meeting	SCFA/FUSE	4 hrs.		already claimed
3/3/03	FUSE Negotiations	FUSE	6 hrs.		already claimed
3/4/03	Retiree scenario spreadsheets CBA	SCFA/FUSE	1 1/2 hrs.		
3/4/03	Meet with Ron Martinez and Doug Smith regarding retiree incentives. <i>claimed by Martinez + Smith</i>	SCFA/FUSE	2 hrs.	1 <sup>ea</sup>	
3/5/03	Work on JLMC Recollections	SCFA/FUSE	1 hr.	1.5 ea	
3/6/03	Part-time faculty issue & Meeting w/Vicki Reader	SCFA	4 hrs.		
3/6/03	SCFA Negotiations	SCFA	3 hrs.		already claimed
3/10/03	FUSE Negotiations	FUSE	4 hrs.		already claimed

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Employee signature: *Jeanne Leland* Date: 3/11/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

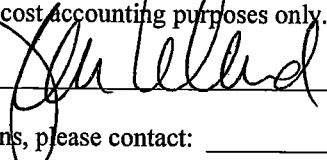
District: Sierra College Fiscal Year: 2002-2003

Jeanne Leland Personnel/Classification Coordinator and Special Projects  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 789-2947 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
3/11/03	Work on SCFA Recollections, side letter/research	SCFA	4 hrs.		
3/12/03	Worked w/Vance on Torben's appeal/conversion. Meet with Appeals Committee for Torben's appeal	FUSE	3 1/2 hrs.		
3/13/03	Worked w/Vance & Shari Newman on job tracks	FUSE	3 1/2 hrs.		
3/13/03	SCFA negotiations	SCFA	3 hrs.	already in	
3/14/03	SCFA Recollections/Torben Erikson report	SCFA/FUSE	4 hrs.	2 <sup>nd</sup> eq	
3/17/03	FUSE Reclass/FUSE recollections	FUSE	6 hrs.		
3/18/03	Working on Position budget savings analysis/Retiree Incentive/Reclass appeal revision/FUSE recollections	SCFA/ FUSE	8 hrs.	4 <sup>th</sup> eq	
3/19/03	Working on job tracks and reorganizations	FUSE	8 hrs.		
3/20/03	Meet w/Dean's Council on PT faculty issues/SCFA recollections	SCFA	1 1/2 hrs.	already claimed	
3/20/03	Work with John Bukey on FUSE Article 21	FUSE	2 hrs.		
3/20/03	SCFA meeting	SCFA	3 hrs.		
3/20/03	SCFA retiree analysis	SCFA	7 hrs.		
3/24/03	FUSE negotiations	FUSE	7 hrs.	already claimed	
3/25/03	Review position descriptions w/Vance. Work on Yuba College retiree incentive analysis/SCFA recollections/research SCFA Title 5	FUSE/ SCFA	6 hrs.	3 <sup>rd</sup> eq	
3/27/03	Work w/Vance on Re-orgs/JLMC meeting	FUSE/SCFA	6 hrs.	already claimed	
3/31/03	Work on JLMC recollections/draft revisions	FUSE/SCFA	2 hrs.	1 <sup>st</sup> eq	

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Employee signature:  Date: 4/1/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Jeanne Leland Personnel/Classification Coordinator and Special Projects  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 789-2947 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
3/11/03	Work on SCFA Recollections, side letter/research	SCFA	4 hrs.		
3/12/03	Worked w/Vance on Torben's appeal/conversion. Meet with Appeals Committee for Torben's appeal	FUSE	3 1/2 hrs.		
3/13/03	Worked w/Vance & Shari Newman on job tracks	FUSE	3 1/2 hrs.		
3/13/03	SCFA negotiations	SCFA	3 hrs		
3/14/03	SCFA Recollections/Torben Erikson report	SCFA/FUSE	4 hrs.		
3/17/03	FUSE Reclass/FUSE recollections	FUSE	6 hrs.		
3/18/03	Working on Position budget savings analysis/Retiree Incentive/Reclass appeal revision/FUSE recollections	SCFA/ FUSE	8 hrs.		
3/19/03	Working on job tracks and reorganizations	FUSE	8 hrs.		
3/20/03	Meet w/Dean's Council on PT faculty issues/SCFA recollections	SCFA	1 1/2 hrs.		
3/20/03	Work with John Bukey on FUSE Article 21	FUSE	2 hrs.		
3/20/03	SCFA meeting	SCFA	3 hrs.		
3/20/03	SCFA retiree analysis	SCFA	7 hrs.		
3/24/03	FUSE negotiations	FUSE	7 hrs.		
3/25/03	Review position descriptions w/Vance. Work on Yuba College retiree incentive analysis/SCFA recollections/research SCFA Title 5	FUSE/ SCFA	6 hrs.		
3/27/03	Work w/Vance on Re-orgs/JLMC meeting	FUSE/SCFA	6 hrs.		
3/31/03	Work on JLMC recollections/draft revisions	FUSE/SCFA	2 hrs.		
4/1/03	Work with consultant, Vance Jacobson, on reorgs & conversions	FUSE	1 hr.		
4/1/03	Work on FUSE recollections	FUSE	2 1/2 hrs.		
4/3/03	Work on SCFA release time research	SCFA	2 hrs.		
4/3/03	SCFA prep work	SCFA	1 hr.		
4/4/03	FUSE prep - review and research	FUSE	2 hrs.		
4/8/03	SCFA recollections (retiree incentive)	SCFA	3 hrs.		
4.8.03	FUSE recollections	FUSE	2 hrs.		

*See previous sheet*

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: *Jeanne Leland* Date: 6/28/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_



Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Jeanne Leland Personnel/Classification Coordinator and Special Projects
Employee Name Exact Position Title

Human Resources, Rocklin (916) 789-2947 12 mon./11 mon./10mon./hrly
Dept. & Location Telephone #

Table with 6 columns: Date, Description of Activities, Bargaining Unit, Time, # of Copies, Leave Blank. Contains 23 rows of activity data with handwritten notes on the left and right margins.

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement.

Employee signature: [Signature] Date: 6/23/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Jeanne Leland Personnel/Classification Coordinator and Special Projects  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 789-2947 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

NP  
NP  
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Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
5/22/02	SCFA prep	SCFA	½ hr.		
5/26/03	JLMC recollections	JLMC	2 ½ hrs.		
5/27/03	Met with Suzanne Davenport regarding online instruction SCFA contract language	SCFA	1 hr.		
6/9/03	FUSE recollections	FUSE	2 hrs.		
6/9/03	Worked on SCFA faculty evals	SCFA	1 hr.		
6/10/03	Worked on revising temp. form and job tracks	FUSE	2 hrs.		
6/12/03	SCFA recollections	SCFA	4 hrs.		
6/17/03	Strategic Council to discuss job vacancies	SCFA/FUSE	2 hrs.	10 ea	
6/17/03	Post 94 meeting	SCFA/FUSE	2 hrs.	10 ea	
6/18/03	Post 94 planning	SCFA/FUSE	2 hrs.	10 ea	
6/19/03	FUSE classification on pending position descriptions	FUSE	4 hrs.		

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: Jeanne Leland Date: 6/23/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

Sierra Joint Community College District  
 Collective Bargaining  
 FY 2002-2003  
 Schedule 4  
 RE : Martinez, Ron  
 Negotiation Preparation

	<b>Component 3</b>	
	<b>Contract Negotiations</b>	
<b>Date</b>	<b>NP Certificated</b>	<b>NP Classified</b>
7/1/02	1.00	1.00
7/17/02	4.50	
7/18/02		1.00
8/14/02	2.00	
8/16/02	2.00	
8/27/02		0.80
8/30/02	1.50	
9/12/02	2.00	
9/13/02	4.00	
9/16/02		1.00
9/20/02		1.00
9/23/02	1.00	1.00
9/26/02	0.50	
9/27/02	2.00	2.00
10/3/02	0.50	
10/4/02		7.00
10/8/02	0.40	
10/10/02	3.00	
10/14/02		1.50
10/21/02	2.00	
10/23/02	1.00	1.00
10/23/02	2.00	
10/24/02	0.50	
10/29/02		2.00
10/30/02	1.00	
10/31/02	0.50	
11/1/02		1.00
11/2/02		1.00
11/5/02	3.00	3.00
11/6/02	2.50	2.50
11/12/02	1.00	
11/15/02		1.00
11/19/02		1.00
11/20/02	1.00	
11/21/02		0.50
11/21/02	0.50	
11/25/02	0.50	
12/2/02	0.50	
12/4/02	2.00	
12/6/02		1.00
12/9/02	0.50	
12/13/02	1.20	1.20
12/16/02	1.50	
12/16/02	1.00	
12/19/02	2.00	
12/19/02	2.00	
1/7/03		1.50
1/7/03		1.50
1/8/03		2.00
1/9/03	0.50	0.50
1/10/03	0.50	
1/10/03	1.50	
1/10/03	2.00	
1/14/03	0.90	
1/14/03	2.00	
1/15/03		1.00

Sierra Joint Community College District  
 Collective Bargaining  
 F/Y 2002-2003  
 Schedule 4  
 RE : Martinez, Ron  
 Negotiation Preparation

	<b>Component 3</b>	
	<b>Contract Negotiations</b>	
<b>Date</b>	<b>NP Certificated</b>	<b>NP Classified</b>
1/16/03		1.00
1/16/03		1.00
1/17/03		7.00
1/21/03		1.00
1/22/03		1.00
1/22/03		1.00
1/24/03		1.00
1/27/03	1.00	
1/27/03	1.00	1.00
1/29/03		1.00
1/29/03		1.00
1/30/03	0.50	
2/3/03		0.50
2/4/03	1.00	
2/5/03		3.00
2/5/03	1.00	1.00
2/6/03	0.50	
2/7/03	0.50	
2/7/03		2.00
2/10/03	1.00	
2/11/03	0.50	
2/11/03	0.50	0.50
2/18/03		5.00
2/19/03		1.00
2/20/03	4.00	
2/21/03		3.00
2/24/03		3.00
2/24/03		4.00
2/25/03	0.50	0.50
2/26/03	1.50	
3/4/03	0.50	0.50
3/6/03	1.00	
3/6/03	1.00	
3/6/03	1.00	
3/7/03	1.00	
3/10/03	1.00	
3/11/03	0.10	
3/11/03		2.00
3/11/03	0.50	0.50
3/12/03	2.00	
3/12/03		2.00
3/13/03	3.50	
3/14/03		1.00
3/17/03	1.00	1.00
3/19/03	0.50	
3/19/03		0.50
3/20/03	2.00	
3/20/03	2.50	
3/26/03		0.50
3/27/03	0.50	0.50
3/28/03	2.00	
4/2/03	1.00	
4/3/03	0.50	
4/8/03	0.40	
4/8/03		1.00

Sierra Joint Community College District  
 Collective Bargaining  
 F/Y 2002-2003  
 Schedule 4  
 RE : Martinez, Ron  
 Negotiation Preparation

<b>Component 3</b>		
<b>Contract Negotiations</b>		
<b>Date</b>	<b>NP Certificated</b>	<b>NP Classified</b>
4/9/03	1.00	
4/9/03		0.50
4/22/03		2.00
4/23/03		3.00
4/25/03	1.00	
4/29/03		1.00
4/30/03		0.50
4/30/03	0.50	
5/6/03		1.00
5/6/03	1.50	1.50
5/8/03	0.50	
5/12/03		1.50
5/13/03		1.00
5/14/03		1.00
5/14/03	0.50	0.50
5/15/03	0.50	
5/16/03	1.00	
5/16/03	1.50	
5/22/03	1.50	
5/22/03	0.50	
5/27/03	1.00	
5/27/03	1.00	
5/29/03	0.50	
6/11/03		1.00
6/11/03	1.00	
<b>Totals</b>	<b>107.00</b>	<b>101.50</b>
<b>Key</b>	NP	Negotiation Preparation

## Employee Time Record Sheet for Mandate Cost of 961/75 Collective Bargaining

District: Sierra Joint Community College

Fiscal Year: 2002-2003

Ron Martinez  
Employee Name

Interim Associate Vice President, Human Resources  
Exact Position Title

Rocklin Campus  
School/Department/Location

(916) 781-0520  
Telephone #

12mo/11mo/10mo/hrly  
Work year length

**Reimbursable Activities:**

- Code 1: Determining Bargaining Units and Exclusive Representation
- Code 2: Election of Unit Representation
- Code 3: Negotiations (Preparation and "At-table")
- Code 4: Impasse Proceedings
- Code 5: Agreement Disclosure
- Code 6: Contract Administration (except "Grievances")
- Code 7: Unfair Labor Practice Charges

NOTE: Only one code entry per line.

Date	Activity Code (Circle One)	Activity (List Topic)	Barg. Unit	Duration Hrs/min	Sub Req'd?
8/27/02	1 2 <b>3</b> 4 5 6 7	Closed Sessions of the Board of	FUSE	45 min	Y <b>N</b>
10/8/02	1 2 <b>3</b> 4 5 6 7	Trustees - Conference with District	SCFA	25 min	Y <b>N</b>
11/12/02	1 2 <b>3</b> 4 5 6 7	Labor Negotiator		59 min	Y <b>N</b>
1/14/03	1 2 <b>3</b> 4 5 6 7			55 min	Y <b>N</b>
2/11/03	1 2 <b>3</b> 4 5 6 7	FUSE = Federation of United School		28 min	Y <b>N</b>
3/11/03	1 2 <b>3</b> 4 5 6 7	Employees (Classified		10 min	Y <b>N</b>
4/8/03	1 2 <b>3</b> 4 5 6 7	Bargaining Unit)	✓	25 min	Y <b>N</b>
/ /	1 2 3 4 5 6 7	SCFA = Sierra College Faculty			Y N
/ /	1 2 3 4 5 6 7	Association (Faculty			Y N
/ /	1 2 3 4 5 6 7	Bargaining Unit)			Y N
/ /	1 2 3 4 5 6 7				Y N
/ /	1 2 3 4 5 6 7				Y N
/ /	1 2 3 4 5 6 7				Y N
/ /	1 2 3 4 5 6 7				Y N

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Employee Signature Sue Fisher for Ron Martinez

Date 9/30/03

If you have any questions, please contact Sue Fisher at (916) 781-0539

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_.

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Ron Martinez Interim Associate Vice President, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

UP  
AG  
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NP

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
6/5/02	P.E. Coaches meeting with Kevin Ramirez	SCFA	1 hr.		
6/19/02	ACHRO Conference – Lake Tahoe	FUSE/SCFA	6 hrs.		
6/20/02	ACHRO Conference – Lake Tahoe	FUSE/SCFA	6 hrs.		
6/25/02	Meet with Vance Jacobson	FUSE	1 hr.		
7/1/02	Meet with George Holt	FUSE/SCFA	2 hrs.	(1 <sup>ea</sup> )	
7/15/02	Grievance – campus police vehicle	FUSE	1 hr.		
7/16/02	Meet with Robert Wickstrom – medical benefits	JLMC	1 hr.		
7/17/02	Meet with Don Cosper	SCFA	4 ½ hrs.		
7/18/02	Meet with Carole Perry & Karen Walters Dunlap	FUSE	1 hr.		
8/5/02	JLMC Meeting	JLMC	8 hrs.		
8/6/02	PERB Hearing – Torben Erickson	FUSE	4 hrs.		
8/14/02	Meet with Doug Smith and Don Cosper	SCFA	2 hrs.		
8/16/02	Meet with Morgan Lynn, Don Cosper, Michelle Kalina RE: HD/ECE both claimed by Lynn	SCFA	2 hrs.		
8/30/02	Meet with Don Cosper and Doug Smith claimed	SCFA	1 ½ hrs.		
9/12/02	Meet with John Bukey, Jeanne Leland & Doug Smith	SCFA	2 hrs.		
9/13/02	Meet with Morgan Lynn and George Holt	SCFA	4 hrs.		
9/16/02	Meet with Vance Jacobson and Jeanne Leland	FUSE	1 hr.		
9/20/02	Web career ladder meeting	FUSE	1 hr.		
9/23/02	Meet with Don Cosper and Jory Hadsell	FUSE/SCFA	2 hrs.	(1 <sup>ea</sup> )	
9/26/02	Meet with Doug Smith & Jeanne Leland	SCFA	½ hr.		
9/27/02	Meet with George Holt	FUSE/SCFA	4 hrs.	(2 <sup>ea</sup> )	
10/4/02	HR Retreat	FUSE	7 hrs.		
10/7/02	PERB Hearing – Torben Erickson	FUSE	3 ½ hrs.		
10/10/02	Meet with John Bukey	SCFA	3 hrs.		

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Employee signature: *Ron Martinez* Date: 12/12/02

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

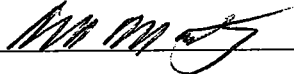
Ron Martinez Interim Associate Vice President, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

NP  
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Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
10/03/02	Meet with Doug Smith & Jeanne Leland	SCFA	½ hr.		
10/24/02	Meet with Doug Smith & Jeanne Leland	SCFA	½ hr.		
10/31/02	Meet with Doug Smith & Jeanne Leland	SCFA	½ hr.		
12/2/02	Meet with Doug Smith & Jeanne Leland	SCFA	½ hr.		
12/4/02	Meet with Don Cosper	SCFA	2 hrs.		
12/6/02	Meet with Jory Hadsell	FUSE	1 hr.		
12/9/02	Meet with Doug Smith & Jeanne Leland	SCFA	½ hr.		
12/13/02	Meet with John Bukey	SCFA/FUSE	2 ½ hrs.	1.20	

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Employee signature:  Date: 12/12/02

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

COPYRIGHT 1998 SixTen and Associates



**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Ron Martinez Interim Associate Vice President, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
10/14/02	Hartford Fund meeting with retirees	JLMC	3 hrs.		
10/14/02	Discipline Hearing – Community Ed.	FUSE	1 ½ hrs.		
10/15/02	Hartford Fund meeting with retirees in NCC	JLMC	2 hrs.	} 4 <sup>o</sup>	
10/15/02	Hartford Fund meeting with retirees	JLMC	2 hrs.		
10/16/02	ACRHRO Conference – San Diego	SCFA/FUSE	8 hrs.		
10/17/02	ACRHRO Conference – San Diego	SCFA/FUSE	8 hrs.		
10/18/02	ACRHRO Conference – San Diego	SCFA/FUSE	8 hrs.		
10/21/02	SCFA Headcount	SCFA	2 hrs.		
10/22/02	School Service Workshop – Employee Benefits & Collective Bargaining	JLMC	6 ½ hrs.		
10/23/02	Meet with Dennis Lee & Dennis Daugherty	JLMC	2 hrs.	1 <sup>o</sup> ea	
10/23/02	Part-time faculty issues	SCFA	2 hrs.		
10/29/02	FUSE Benefits meeting – VEBA Trust Fund	FUSE	2 hrs.		
10/30/02	Meeting with Doug Smith & Don Cosper	SCFA	1 hr.		
11/1/02	Meet with Doug Smith & Jory Hadsell – FUSE release time <u>claimed</u>	FUSE	1 hr.		
11/2/02	FUSE Formula Detail with Doug Smith & Jory Hadsell	FUSE	1 hr.		
11/5/02	Granlibaken – spoke on negotiations	FUSE/SCFA	6 hrs.	3 <sup>o</sup> ea	
11/6/02	Granlibaken – spoke on negotiations	FUSE/SCFA	5 hrs.	2.5 <sup>o</sup> ea	
11/15/02	District Vehicle Use Meeting	FUSE	1 hr.		
11/19/02	Meet with Vance Jacobson – conversion	FUSE	1 hr.		
11/20/02	Meet with Morgan Lynn & Don Cosper – ECE	SCFA	1 hr.		
11/21/02	Meet with Scott Snyder & Paul Wiley	FUSE	½ hr.		
11/21/02	Meet with Doug Smith & Jeanne Leland	SCFA	½ hr.		
11/25/02	Meet with Doug Smith & Jeanne Leland	SCFA	½ hr.		

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Employee signature: *Ron Martinez* Date: 12/12/02

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Ron Martinez Interim Associate Vice President, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon/11 mon./10mon./hrly  
Dept. & Location Telephone #

NP ↓

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
12/16/02	Met with Tina Ludutsky-Taylor, Neal Allbee and Morgan Lynn RE: Heather McColgan	SCFA	1 1/2 hrs.		
12/16/02	Met with Mandy Davies on Campus Life job description and evaluation	SCFA	1 hr.		
12/19/02	Met with Doug Smith & Don Cosper	SCFA	2 hrs.		
12/19/02	Met with Darlene Jackson & Morgan Lynn on job assignment	SCFA	2 hrs.		
1/7/03	Met with Vicki Reader RE: Jill Simuro	FUSE	1 1/2 hrs.		
1/7/03	Met with Vance Jacobson RE: conversion	FUSE	1 1/2 hrs.		
1/8/03	Met with Shari Newman	FUSE	2 hrs.		
1/9/03	Met with Doug Smith RE: closed session for Board Meeting	SCFA/FUSE	1 hr.	5ea	
1/10/03	Met with Don Cosper & Doug Smith	SCFA	1/2 hr.		
1/10/03	Met with Don Cosper, Morgan Lynn & Doug Smith	SCFA	1 1/2 hrs.		
1/10/03	SCFA Caucus (Doug Smith, Morgan Lynn, Mandy Davies)	SCFA	2 hrs.		
1/14/03	Met with part-time faculty in Grass Valley	SCFA	2 hrs.		
1/15/03	Met with Shari Newman	FUSE	1 hr.		
1/16/03	Met with Ray Cunningham to evaluate Tim Kyle in complying with contract	FUSE	1 hr.		
1/16/03	Met with Ray Cunningham to evaluate Dan Brown in complying with contract	FUSE	1 hr.		
1/17/03	FUSE Retreat	FUSE	7 hrs.		
1/21/03	Met with Shari Newman	FUSE	1 hr.		

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: [Signature] Date: 2/10/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Ron Martinez Interim Associate Vice President, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
1/22/03	Met with Ray <u>Cunningham</u> to evaluate Steve Clarkson in complying with contract	FUSE	1 hr.		
1/22/03	Met with Ray <u>Cunningham</u> to evaluate Mike Conley in complying with the contract	FUSE	1 hr.		
1/24/03	Met with Morgan <u>Lynn</u> , Steve <u>King</u> Stephanie <u>Guevara</u> RE: Pam Sessions	FUSE	1 hr.		
1/27/03	Met with Don Cosper	SCFA	1 hr.		
1/27/03	Met with SCFA & FUSE staff on Post-94 Hires	SCFA/FUSE	2 hrs.	<u>1 ea</u>	
1/29/03	Met with Vance <u>Jacobson</u> & Kevin <u>Ramirez</u>	FUSE	1 hr.		
1/29/03	Met with Ray <u>Cunningham</u> , Carla <u>Epting-Davis</u> , Jon <u>Hamblen</u> to discuss Housing Personnel issues	FUSE	1 hr.		
1/30/03	Met with Doug <u>Smith</u> & Jeanne <u>Leland</u>	SCFA	1/2 hr.		
2/3/03	Met with Mandy <u>Davis</u> , Shari Newman to discuss FUSE issue - classified assignments	FUSE	1/2 hr.		
2/4/03	Met with Neal <u>Albee</u> & Stephanie <u>Guevara</u> on faculty eval revisions	SCFA	1 hr.		
2/5/03	Met with George Holt and Darlene <u>Jackson</u> to discuss PERB hearing RE: child care center	FUSE	3 hrs.		
2/5/03	Met with Kevin Ramirez, Morgan <u>Lynn</u> , Doug <u>Smith</u> to discuss possible lay offs	FUSE/SCFA	2 hrs.	<u>1 ea</u>	
2/6/03	Met with Doug <u>Smith</u> & Jeanne <u>Leland</u>	SCFA	1/2 hr.		
2/7/03	Met with Doug <u>Smith</u> & Jeanne <u>Leland</u> to discuss part-time parity <u>Smith claimed on Leland's log</u>	SCFA	1/2 hr.		
2/7/03	Met with Shari Newman to discuss retirement incentives, A&R AA, and release time	FUSE	2 hrs.		
2/10/03	Met with Michelle <u>Kalina</u> & Morgan <u>Lynn</u> on faculty evaluation process	SCFA	1 hr.		

NP ↓

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: [Signature] Date: 2/10/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_  
PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Ron Martinez Interim Associate Vice President, Human Resources  
Employee Name Exact Position Title

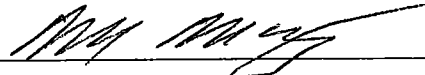
Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
2/11/03	Meet w/Jeanne Leland to draft JLMC side letter	SCFA/FUSE	1 hr.	5 ea	
2/18/03	PERB Hearing in Sacramento Re: FUSE vs. Sierra	FUSE	5 hrs.		
2/19/03	Meeting w/Morgan Lynn, Darlene Jackson and Karen Walters-Dunlap Re: HD/ECE	FUSE	1 hr.		
2/20/03	SCFA Negotiations	SCFA	4 hrs.		
2/21/03	Meeting w/Jeanne Leland and Shari Newman Re: AB500 temps and contracting out.	FUSE	3 hrs.		
2/24/03	Work group w/Consultant on conversion	FUSE	3 hrs.		
2/24/03	Work w/Jeanne Leland and John Bukey on FUSE Articles 2 & 21	FUSE	4 hrs.		
2/25/03	Work on retiree Incentive Program w/Don Cospier and Doug Smith <i>claimed by Smith</i>	SCFA/FUSE	1 hr.	5 ea	
2/26/03	P/T Head Coach stipend meeting with Jan High, Karen Linde and Wayne Barbie	SCFA	1 1/2 hrs.		
2/27/03	JLMC Meeting	SCFA/FUSE	2 hrs.	already taken	
3/3/03	FUSE Negotiations	FUSE	6 hrs.	already taken	
3/4/03	Meeting w/Jeanne Leland and Doug Smith regarding retiree incentives. <i>claimed by Leland + Smith</i>	SCFA/FUSE	1 hr.	5 ea	
3/6/03	Workgroup for part-time faculty issues	SCFA	1 hr.		
3/6/03	HD/ECE meeting with Darlene Jackson, Morgan Lynn and Karen Walters-Dunlap	SCFA	1 hr.		
3/6/03	SCFA Negotiations	SCFA	3 hrs.	2° already taken so	Pherc
3/7/03	Meeting with Doug Smith and Don Cospier regarding negotiations.	SCFA	1 hr.		
3/10/03	FUSE Negotiations	FUSE	4 hrs.	already taken	
3/10/03	Meeting w/Morgan Lynn, Judy McClymonds & Ninette Dollesin regarding faculty evaluations.	SCFA	1 hr.		

ND

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**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature:  Date: 3/15/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Ron Martinez Interim Associate Vice President, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
3/11/03	Meeting w/NCC staff/Morgan Lynn/Doug Smith regarding staff issues	FUSE	2 hrs.		
3/11/03	NCC Board meeting closed session for update on District Negotiations/personnel issues	SCFA/ FUSE	1 hr.	15 ea	
3/12/03	Meeting w/Morgan Lynn on debrief on FERC mtg.	SCFA	2 hrs.		
3/12/03	Torben Eriksen appeal	FUSE	2 hrs.		
3/13/03	SCFA negotiations/pre-meeting w/Doug Smith - 3.5 <sup>o</sup>	SCFA	4 1/2 hrs.	1 hr already taken	
3/14/03	Meeting w/George Holt and Sue Melwick regarding personnel issue.	FUSE	1 hr.		
3/17/03	Meet w/Doug Holt/Robert Wickstrom/Vicki Reader re: 403b/457 Tax Deferred Services and Mandated Costs	SCFA/FUSE	2 hrs.	10 ea	
3/19/03	Meeting w/Alex Wong re: personnel issue	SCFA	1/2 hr.		
3/19/03	Meeting w/Shari Newman re: retirement incentive	FUSE	1/2 hr.		
03	Work w/Jeanne Leland/John Bukey on Article 21	SCFA	2 hrs.		
3/20/03	SCFA negotiations/pre-meeting w/Doug Smith	SCFA	4 1/2 hrs.	2 hrs already taken	
3/21/03	Shalita Blackburn deposition in Sacramento w/Schacter/Collins SCB = DFFH ISSUE	SCFA	7 hrs.		
3/24/03	FUSE Negotiations	FUSE	6 hrs.	already taken	
3/26/03	Meet with Doug Smith & Shari Newman regarding retiree incentive	FUSE	1/2 hr.		
3/27/03	JLMC Committee and preparation	SCFA/FUSE	5 hrs.	4 hrs already taken so 15 ea	

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Employee signature: *Ron Martinez* Date: 4/12/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

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**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Ron Martinez Interim Associate Vice President, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

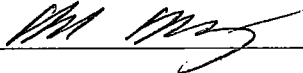
NP  
↓

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
3/28/03	Faculty Forum for part- and full-timers	SCFA	2 hrs.		
4/2/03	Met with Don Cosper	SCFA	1 hr.		
4/3/03	Met with Morgan Lynn	SCFA	½ hr.		
4/8/03	Met with Michelle DeVol, Joan Basque, and Chris Benn to discuss job vacancies on campus	FUSE	1 hr.		
4/9/03	Met with Faculty Senate to discuss Retirement Planning Workshop	SCFA	1 hr.		
4/9/03	Met with David Hay, Sue Helwick, Sue Drennon, Bernard Acuna to discuss David's sick leave	FUSE	½ hr.		
4/22/03	Met Mandy Davies, Vicki Reader, Lawrence Lee regarding Adaptive Technology position	FUSE	2 hrs.		
4/23/03	Met with Jeanne Leland, Vance Jacobson, Sandra Anderson and Shari Newman regarding career ladders and reorg. prep	FUSE	3 hrs.		
4/25/03	Met with Morgan Lynn, Don Cosper & Wayne Barbee regarding PT coaches	SCFA	1 hr.		
4/29/03	Reorg. Prep with Jeanne Leland	FUSE	1 hr.		
4/30/03	Met with Shirley Martindale regarding job description	FUSE	½ hr.		
4/30/03	Met with Sean Booth to discuss his tenured evaluation committee	SCFA	½ hr.		
5/6/03	Met with Rod Nix, Lonnie Schwenk, Steve Jung, Brian Haley to discuss weekend responsibility position	FUSE	1 hr.		
5/6/03	Post 94 meeting	SCFA/FUSE	3 hrs.	(1.5ea)	
5/8/03	Met with Doug Smith & Jeanne Leland to prep for faculty negotiations	SCFA	½ hr.		
5/12/03	Met with Shari Newman & Vance Jacobson, Conversion Consultant	FUSE	1 ½ hrs.		
5/13/03	Met with Tina Sier, Vance Jacobson & Jeanne Leland regarding job description both claimed by	FUSE	1 hr.		
5/14/03	Transportation SCCP with Diane McKnight, Jeanne Leland, Shari Newman & Joyce Kelley	FUSE	1 hr.		
5/14/03	Met with Doug Smith, Jeanne Leland, John Bukey, Robert Wickstrom, Dennis Lee to discuss Post 94	SCFA/FUSE	1 hr.	(1.5ea)	
5/15/03	Met with Doug Smith & Jeanne Leland to prep for faculty negotiations	SCFA	½ hr.		
5/16/03	Met with Don Cosper and Doug Smith to discuss SCFA Formulas	SCFA	1 hr.		

MP

5/16/03	Met with Don Cospers to discuss Heather McColgan Evaluation criteria	SCFA	1 1/2 hrs.		
5/21/03	Blackburn Deposition	SCFA	<del>9 hrs.</del>		
5/22/03	Met with Neal Allbee to discuss Heather McColgan Evaluation process	SCFA	1 1/2 hrs.		

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature:  Date: 5/4/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

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**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Ron Martinez Interim Associate Vice President, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10 mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
5/22/03	Met with Doug Smith & Jeanne Leland to prep for SCFA negotiations	SCFA	1/2 hr.		
5/23/03	Blackburn Deposition	SCFA	<del>9 hrs.</del>		
5/27/03	Met with Suzanne Davenport & Jeanne Leland to discuss distance learning contract language	SCFA	1 hr.		
5/27/03	Met with Neal Allbee, Dolly Green, Karen Parker, Deb Sutphen to discuss Heather McColgan's Eval on Grievance Log	SCFA	1 hr.		
5/28/03	Blackburn Deposition	SCFA	<del>9 hrs.</del>		
5/29/03	Prep for Blackburn Deposition with attorneys	SCFA	<del>4 hrs.</del>		
5/29/03	Prep for negotiations with Doug Smith & Jeanne Leland	SCFA	1/2 hr.		
6/4/03	Blackburn Deposition	SCFA	<del>9 hrs.</del>		
6/5/03	Blackburn Deposition	SCFA	<del>9 hrs.</del>		
6/6/03	Blackburn Deposition	SCFA	<del>8 hrs.</del>		
6/9/03	Blackburn Deposition	SCFA	<del>9 hrs.</del>		
6/11/03	Met with Vance Jacobson, Jeanne Leland, Tina Siler, Shari Newman regarding Tina's job description	FUSE	1 hr.		
6/11/03	Met with Don Cosper and John Volek regarding grievance	SCFA	1 hr.		

NP  
↓

Did we take Blackburn in legals? Check + then see me

I: The State of California requires that school district personnel maintain a timesheet in order for the district to receive reimbursement. Your signature on this timesheet is required for the activity and that you have reported actual time and cost or cost. This information is used for cost accounting purposes only.

[Signature] Date: 8/4/03

Primary contact: \_\_\_\_\_ at \_\_\_\_\_

FOR INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

Notes



## JOINT LABOR MANAGEMENT COMMITTEE – RECOLLECTIONS

Date: September 16, 2002  
Time: 1:00 p.m.  
Place: LRC 313

1.3?

Individual  
Entry

### Members Present:

Classified: Jory Hadsell, Tim Kyle  
Faculty: Don Cosper, Deb Sutphen  
Management: ~~Doug Smith~~, Ron Martinez, John Bukey  
Retirees: Linda Hansen, Leland Mansuetti

NY

### Guests:

Jill Cook, Hartford  
Cindy Green, Kaiser  
Dennis Lee  
Robert Wickstrom

### Hartford Overview (Retirees)

Jill Cook from Hartford gave an informational overview of the Hartford Life SMIP Plan.  
References: Imperial College and Zion Bank.

### Kaiser Overview (Retirees)

Cindy Green from Kaiser gave an informational overview of Senior Advantage.

Who: Dennis Lee  
What: Contact Jill Cook to validate whether the rate is single or composite  
When: ASAP

Who: Ron  
What: Ask Jeanne Leland to join the Management Team for JLMC  
When: ASAP

Who: Ron  
What: Contact Management Senate to secure a Management rep to JLMC  
When: ASAP

Who: Ron  
What: Contact Imperial CCD, Zion Bank, Escondido USD as Hartford references. Ask for a contact with a retiree at one of these locations and provide that information to Leland.  
When: ASAP

Dennis Lee provided the booklet titled: "2003 Group Medical and Dental Record"

## JOINT LABOR MANAGEMENT COMMITTEE – RECOLLECTIONS

Date: September 19, 2002  
Time: 1:00 p.m.  
Place: J7A

1-2:40 = 1.70

Individual  
entry

### Members Present:

Classified: Jory Hadsell  
Faculty: Don Cosper, Deb Sutphen, Luis Sanchez  
District: Doug Smith, Ron Martinez, Jeanne Leland  
Management: Vacant  
Retirees: Linda Hansen, Leland Mansuetti  
Absent: Tim Kyle, John Bukey

### Guests:

Dennis Lee, John Lervold

### PRMF Contribution Options

John Lervold provided handouts and explained his calculations regarding pre and post-1994 PRMF contribution options as requested by the committee.

### Hartford Overview (Retirees)

Ron contacted Imperial CCD, Zion Bank, and Escondido USD to provide references for Hartford. He provided a handout of the response from Imperial regarding their experience with Hartford, Plan F. *Other responses pending.*  
Ron gave Leland a retiree reference to contact regarding the Hartford plan.

### Kaiser Overview (Retirees)

Dennis Lee contacted Jill Cook to verify the rate information presented last meeting is a single – not composite rate. *Item closed.*

### JLMC Membership

- Ron asked Jeanne Leland to join the Management Team for JLMC. Accepted. *Item closed.*
- Ron contacted Bill Rogers, Management Senate President, to secure a Management rep to JLMC. Bill sent out an e-mail. *Response pending.*

### Consensus Proposal #1

Roll over current plans for actives and begin open enrollment process. State intent to go with Hartford plan at 65 yrs. of age.

Who: Ron

What: Set up meeting for all retirees to talk with Hartford and US Script reps.

When: ASAP

**Consensus achieved.**

## JOINT LABOR MANAGEMENT COMMITTEE – RECOLLECTIONS

Date: December 5, 2002  
Time: 1:00 p.m. - 2:15  
Place: J7A (see pg 3)

1.30

Individual  
entry

### Members Present:

Classified: Jory Hadsell, Tim Kyle  
Faculty: Don Cospers, (facilitator) Deb Sutphen, Luis Sanchez  
District: Doug Smith, Ron Martinez, Jeanne Leland, Sue Drennon  
Management: Vacant  
Retirees: Linda Hansen, Leland Mansuetti  
Absent: John Bukey

### Guests:

Robert Wickstrom, Dennis Lee, John Lervold, Dennis Daugherty

### 1. PRMF Contribution Options

The meeting began with a presentation from Dennis Daugherty of Nicolay Consulting Group (Pension Consultants and Actuaries). Using data provided by John Lervold, Mr. Daugherty presented three fund projections specific to employees hired prior to July 1, 1994. Mr. Daugherty also presented a 30 yr. cash-flow model providing three fund projections to fund a postretirement medical benefit for District employees hired on, or after, July 1, 1994.

After much discussion the following proposals were accepted:

1. Beginning 03-04, 04-05, 05-06  
Adopt the \$50.00 scenario – First course correction within three years.  
Get feedback from constituencies, vote, ratification  
Counsel language by 1/20/03 meeting
2. Set-up Post-94 separate trust  
1%/1% District/employee match  
  
Hire consultant, B. Shana Saichek, to begin trust set-up process. District pays.  
To be in place by Jan. 04.  
Counsel to draft language to incorporate and adopt into both contracts.  
Recommendations go back to constituencies.

Discussion continued regarding using separate trust funds for both post & pre 1994s, each with different payouts.

Who: Doug  
What: Contact Ms. Saichek to find out trust fund cost  
When: ASAP

**JOINT LABOR MANAGEMENT COMMITTEE – RECOLLECTIONS**

Date: January 23, 2003  
Time: 1:00 p.m. - 2:15 : 1.30  
Place: J7A (see pg 2)

Individual  
Quincy

**Members Present:**

Classified: Jory Hadsell, Tim Kyle  
Faculty: Don Coper,  
District: Doug Smith, Ron Martinez, Jeanne Leland, Sue Drennon,  
John Dukey (facilitator)  
Management: Maggie White  
Retirees: Linda Hansen, Leland Mansuetti  
Absent: Deb Sutphen, Luis Sanchez  
Guests: Jim Weir

Already  
claimed  
in attys  
schedule

• **Review of Recollections from 12/5/02**

1. **PRMF Contribution Options**

Group reviewed proposals (JLM side letters JLM 02-01 and JLM 02-02) and suggested several revisions. Revision of 02-02 letter needs to be reviewed by the attorney. No ratification will take place until management poll comes back. Side letters can be signed before poll.

- W: Maggie White
- W: Poll management team by sending email with attached revised side letters (from Jeanne) and proposal (from Millie/Doug)
- W: Poll out by Monday, 1/27/03 and results by Thursday, 1/30/03 for SCFA meeting.

- Buyback rules to be determined by the trust. – (consensus)
- Since JLM is not a collective bargaining group, Doug pointed out that the contractual relationship between the attorney, Ms. Saichek should be with the District/Board of Trustees, not this group.
- Correspondence from the attorney needs to come to Doug, Jory, and Don
- Deb Sutphen has organized a post-94 informational meeting on Monday, January 27, 2003 in the Fireside Room. If FUSE would like to invite their membership, please work with Deb to let her know and to locate a larger room.

Contract for attorney, Ms. Saichek needs to be approved by the Board.

- W: Doug
- W: Agendize for Board approval
- W: Board meeting following ratification

**MANDATED COST TRACKING FORM**  
Complete a separate form for each activity

Date: <b>2/27/03</b>	Time: <b>1:00 - 4:00 PM</b> (nearest 1/4 hour) <b>3 Hours</b>		
Parties Present:  <b>SEE ATTACHED</b>			
Grievant's Name: <b>N/A</b>			
Description (include section of contract being discussed):  <b>JOINT LABOR MANAGEMENT CTE. MEETING - PROVIDING INSTRUCTIONS TO CONSULTANT TO SET UP POST-94 EMPLOYEE TRUST</b>			
Unions (circle one):  <div style="display: flex; justify-content: space-around; align-items: center;"> <span style="border: 1px solid black; border-radius: 50%; padding: 2px 10px;">SCFA</span> <span style="border: 1px solid black; border-radius: 50%; padding: 2px 10px;">FUSE</span> </div>			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	<span style="border: 1px solid black; border-radius: 50%; padding: 2px 5px;">OO</span>	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds			

## JOINT LABOR MANAGEMENT COMMITTEE – RECOLLECTIONS

Date: February 27, 2003  
Time: 1:00 p.m. – 4:00 (3.0)  
Place: Boardroom (see previous green sheet)

Individual  
entry

### Members Present:

Classified: Shari Newman, Tim Kyle  
Faculty: \*Don Cosper, Luis Sanchez  
District: Doug Smith, \*Ron Martinez, Jeanne Leland, Sue Drennon,  
John Bukey (facilitator)  
Management: Sue Fisher and Sue Michaels (for Maggie White)  
Retirees: Linda Hansen  
Absent: Deb Sutphen, Maggie White, Leland Mansuetti Jory Hadsell  
Guests: Robert Wickstrom, Shana Saichek

- Left meeting

John Bukey introduced Shana Saichek, employee benefits attorney, to the assembled group. Today's goal is to begin work on the development of the Sierra College Retiree Medical Trust for post 94 hires. Ms. Saichek provided two hand outs for the purpose of developing a proposal for the structure of the trust fund.

Ms. Saichek described the employee medical trust as a tax exempt separate legal entity that enables benefit withdrawals to be tax exempt as well. She advises hiring a professional investment manager. She also stressed that this trust is not a pension plan but a retiree medical trust based on two principles: 1) The funding of the plan must be done on a group basis, without individual choices about the amount of contribution and 2) The Trustees must ensure that benefit payments are spent on medical care or coverage. Otherwise the Trust runs the risk that the plan will be deemed a pension plan by the IRS.

Unions will need to ratify. First, the side letter will need to be ratified, and second the trust package will need to be ratified too. Unions plan to ratify within two weeks.

Discussion included the following: Shana stated her duty is to the Trust not unions or management – she will not take sides. She asked about the Grand Jury complaint. John stated that this Trust is absolutely separate.

Shana asked why Pre-94s are paying their 1% in post tax dollars. She felt that even though the PRMF is not a true trust, Knox Keane may apply. She will review this option and bill hourly to the District; this work will be separate from the Post-94 work.

There is an option that exists to use sick leave and/or vacation leave balances to contribute to the

- **Review of Recollections from 1/23/03**

### 1. PRMF Contribution Options

already  
claimed  
Attys  
Schedule

## JOINT LABOR MANAGEMENT COMMITTEE – RECOLLECTIONS

Date: March 27, 2003  
Time: 1:00-5:00 P.M.  
Place: Boardroom

40

Individual  
Entry

### Members Present:

Classified: Shari Newman  
Faculty: Deb Sutphen, Jim Weir (for SCFA reps)  
District: Doug Smith, Ron Martinez, Jeanne Leland, Sue Drennon,  
John Bukey (facilitator)  
Management:  
Retirees: Leland Mansuetti  
Absent: Tim Kyle, Don Cosper, Luis Sanchez, Linda Hansen, Maggie White  
Guests: Robert Wickstrom, Vicki Reader, Dennis Lee, Doug Holt, Shana Saichek

Already  
Claimed  
Any's  
Scheduled

### Deferred Compensation 3<sup>rd</sup> Party Administrator

Robert Wickstrom spoke with several 403(b)/457 plan administrators and invited Doug Holt of TDS (Tax Deferred Services) to present his company's services.

Mr. Holt described services that would relieve Sierra College of the administration and potential liability of these increasingly complex tax deferred plans. Mr Holt described services that provide the greatest benefit out of these plans for the employee. TDS offers employee retirement planning classes and individual counseling, PERS/STRS expertise, access to a greater number of investment plans vendors and vehicles, local offices, and an 800 number service center. As administrator, TDS would receive one check from the District and insure payroll deductions are dispersed in a timely manner to individual employee plans and in compliance with IRS regulations and contribution limitations. The District will receive electronic historical files from TDS and TDS will maintain individual employee records. The District will continue to provide the salary deduction agreement to TDS and TDS will provide the administration from that point. TDS also offers retiree incentive plans such as PARS and Keenan.

**Consensus:** To use TDS as 3<sup>rd</sup> party administrator. (John Bukey did not vote due to a working relationship with TDS.)

Two general information meetings are planned in the Boardroom on Thursday, April 10 from 3:00-5:00 PM and Friday, April 11 from 9:00-11:00. STRS information will be presented during the first hour and PERS during the second hour of each meeting. Individual meetings will also be available. Personnel will be sending out a memo to announce these meetings.

### Post-94 Trust Fund

Shana Saichek, trust attorney for Carney Badley & Spellman, handed out a Draft (#1) "Medical Expense Reimbursement Plan of the Sierra College Employees Benefit Trust" and a draft of "Trust Agreement governing the Sierra College Employees Benefit Trust" for review today by JLMC.

## JOINT LABOR MANAGEMENT COMMITTEE – RECOLLECTIONS

Date: May 20, 2003  
Time: 10:00-12:00 P.M.  
Place: L-193

2.0

Individual  
Entry

### Members Present:

Classified: Shari Newman, Tim Kyle, Jory Hadsell  
Faculty: Deb Sutphen, Luis Sanchez, Don Cosper  
District: ~~Doug Smith~~, Ron Martinez, Jeanne Leland, Sue Drennon,  
John Bukoy (facilitator)  
Management: Maggie White  
Retirees: Leland Mansuetti, Linda Hansen  
Absent: Doug Smith  
Guests: Dennis Lee, John Lervold, Shana Saichuk, Dennis Daugherty by  
conference call (ended 11:15)

### 1. Post-94 Trust Fund

The meeting began with a conference call with Dennis Daugherty and Shana Saichuk. Dennis presented the actuarial information using 16 different scenarios (handouts provided to committee) according to the current Post-94 Trust Plan design.

Using Exhibit 11 as the basis for most of the discussion, Shana felt the investment rate might be too conservative. She raised the question: what is a sufficient fund balance to feel secure that the fund is able to pay liabilities? What is the fund able to provide as a benefit rather than pre-establishing a benefit amount? Shana felt administration fees would be higher initially (6-8%) and level out to 3-4% annually as the fund matures. The Post-94 Trust will grow as more pre-94 employees retire. Shana stated that refunds are not possible, legally required.

The group agreed, by consensus, to have Dennis to run additional actuarial scenarios based on the following assumptions: Investment rate 4%, COLA 5% - unstated (growth of benefit is 5%), survivor benefits, both with and without, administrative fee of 3% averaged out over the life of the fund, a 2% employee growth rate, and a 2 to 1 benefit based on pre and post-Medicare eligible retirees. Additionally run another scenario with a 2%/2% match contribution rate for the purposes of projection only and possibly to double the benefit amount. The committee requested that Dennis add columns to scenarios that would show the value of future benefits (growth of benefit) and the percentage to full funding (responsible fund balance). Actuarial data is to answer the question regarding what benefit amount is the fund able to provide and still maintain a responsible fund balance.

W: Dennis Daugherty

W: Provide actuarial data as requested by June 10<sup>th</sup> with a preview copy to Shana by June 4<sup>th</sup>.

W: See above

FUSE has not yet ratified the Post-94 Trust due to concerns raised at the Open Forums in May. Shari is concerned that a \$200.00 monthly benefit will not be sufficient to pass. Shari plans to go for ratification July 1<sup>st</sup> and needs two weeks time for a vote. Shana



**PART-TIME FACULTY WORKGROUP RECOLLECTIONS**

AC

Date: October 10, 2002 30  
 Time: 1:00-4:00  
 Location: Fireside

→ already claimed on Atty's Schedule

John Bukey (facilitator), Doug Smith, Ron Martinez, Jeanne Leland, Roberta McKinney, Christina Culley, Tina Kudutsky-Taylor, Neal Allbee, Mary Conway, Michelle Kalina, Karen Walters-Dunlap, Bill Tsuji

Part-time faculty issue on the table with discussions regarding evaluations, assignment, seniority and the 60% rule among other issues.

Ron passed out copies of Jim Weir's proposal and informed group that a spreadsheet program he developed is available to assist workgroup in ranking their options.

Purpose of meeting is to develop a consensus of what this group can live with. Otherwise, what is in the contract currently will remain unless we establish a substitute or an alternative.

Workgroup discussed part-time concerns: skill level, seniority, site specific seniority, process varies division to division; treatment of seniority issues varies within divisions, current contract doesn't speak to effectiveness, suitability based on criteria, determining suitability at hire, seniority (#of semesters) vs. suitability (skill) = evaluation system part of seniority; suitability tied to outcome - success rate/effectiveness, no one likes backdoor hires, more flexibility, right of assignment based on experience and background, an evaluation that works.

OPTIONS - Winnowing of Options by Workgroup

1. 40% load maximum at first pass, with additional assignment of classes at 2<sup>nd</sup> pass. All courses in the department. Beyond 40% offered in seniority order.
2. Status quo
3. ~~Development of a senior part-time status with enhanced privileges and responsibilities (like two-tiers).~~
4. #1 plus no guarantee of a 60% load based on seniority from semester to semester.
5. First Input Individually that is administrator discretion.
6. No s
7. Guar → Smith
8. #2 pl → Martinez ✓
9. Lotte → Leland ✓
10. Inere
11. Nobe → McKinney X
12. No se → Culley X  
 → Ludutsky ✓

(Continued) → Allbee ✓  
 → Conway ✓  
 → Kalina ✓  
 → Walters-Dunlap ✓  
 → Tsuji ✓

Contract Admin

on PHR list  
 of the  
 impin  
 sent? (at least not been sent for mem)  
 fund  
 McKinney  
 or  
 Culley

## PART-TIME FACULTY WORKGROUP RECOLLECTIONS

Date: October 23, 2002  
Time: 9:00-11:00 AM  
Location: LRC 313

Ron Martinez, Jeanne Leland, Michelle Kalina, Diane McKnight

Purpose of meeting is to develop a proposal regarding part-time faculty issues currently under discussion at negotiations.

### OPTIONS – Further Winnowing of Options by Workgroup

1. 40% load maximum at first pass, with additional assignment of classes at 2<sup>nd</sup> pass. All courses in the department. Beyond 40% offered in seniority order.
2. Status quo.
8. #2 plus Existing contract language to eliminate bumping ladder.  
(**Changed #8 to “eliminate bumping ladder for full-time faculty”.**)
12. No seniority until you've been in the District for five years a number/units
15. No seniority for distance learning (TV, on-line).
51. #1 plus no *new part-time* hiring until completion of second pass.
52. Avoid inadvertent loss of seniority due to no fault of part-timers. Seniority is maintained if load is less-no fault of part-timer.
54. Set aside seniority in emergency situations where someone has left assignment.
56. Exempt all Public Safety, Contract Ed., Nursing, and noncredit courses from seniority.
58. Develop specialized system for PE and Athletics.
61. More flexibility division by division

Note: Diane will check with Mary to clarify her option regarding PE & Athletics

### PROPOSAL:

Each semester part-time faculty assignment is as close as possible to 40% maximum load by seniority at first pass. At second pass the remaining courses up to a maximum of 60% are assigned in seniority order. No new part-time hires will occur until completion of the second pass.

For new part-time faculty only, seniority will not accrue until the completion of two successful evaluations and five years of service.

Due to the nature of the curriculum Public Safety, Contract Education, Nursing, non-credit, and Distance Learning courses are exempt from all part-time seniority. (PE pending)

Seniority will not be affected by circumstances beyond the control of the part-time faculty member.

Input Individually  
→ Martinez  
→ Leland  
→ Kalina  
→ McKnight

Contract Administration

**NICOLAY  
CONSULTING**

**NICOLAY CONSULTING GROUP**  
Pension Consultants & Actuaries  
333 Hegenberger Road, Suite 800  
Oakland, California 94621  
Tel (510) 567-0610 ♦ Fax (510) 567-0629

**TO: Mr. Douglas R. Smith**  
Vice President, Finance and Administration  
Sierra Community College District  
500 Rocklin Road  
Rocklin, California 95677

**Date: December 26, 2002**

**Invoice No.: 343-2002-11**

Job Descriptions	Fees and Expenses
<p>Billing for actuarial and consulting services rendered from October, 2002 through December, 2002 in connection with the postretirement healthcare program sponsored by Sierra College.</p> <p>These services included the following:</p> <ol style="list-style-type: none"> <li>1. Preparation for and attendance by Dennis Daugherty at an October 23, 2002 meeting to discuss the current plan and proposed changes that would extend benefits to employees hired after July 1, 1994.</li> <li>2. Review the work completed by the postretirement task force.</li> <li>3. The preparation of multi-year Fund Balance projections for the current program under a variety of withdrawal assumptions.</li> <li>4. The preparation of multi-year Fund Balance projections for employees hired since July 1, 1994.</li> <li>5. Preparation for and attendance by Dennis Daugherty at a December 5, 2002 meeting with the Joint Labor Management Team to discuss the projections.</li> <li>6. The preparation of final letters, dated December 19, 2002.</li> <li>7. Several telephone conversations with District personnel to discuss assumptions and the projections.</li> </ol> <p style="text-align: center;"><b>Total amount due</b></p> <p><i>Please return the consultant's copy with your remittance at the above address.</i></p>	<p style="text-align: right;">\$7,900.00</p> <p style="text-align: right;">SIX TEN &amp; ASSOC. JAN 2</p>

Input  
individually  
→ Nicolay Consulting  
Gp.

Signature  
AN 10 27 02

MT

**CATHERINE HARRIS** Esq.  
Arbitrator • Factfinder • Mediator

Post Office Box 221427  
Sacramento, CA 95822  
(916) 444-3317 Fax (916) 443-4635

February 28, 2003

GEORGE W. HOLT, Esq.  
Johnson Schachter & Collins  
2180 Harvard Street Suite 560  
Sacramento, CA 95815

Re: Sierra College Faculty Retirees' Arbitration  
Our: 59871750

check this  
did not  
feature in  
legals  
If  
Did not (CB)

STATEMENT FOR SERVICES

FOR PROFESSIONAL SERVICES	PER DIEM	\$	800.00
2/27/03 cancellation fee (1 day)	\$ 950.00		
2/28/03 cancellation fee (1 day)	\$ 950.00		
Total Per Diem:		\$	1,900.00
Expenses:	Input	\$	0.00
Total Per Diem and Expenses:	individually	\$	1,900.00
DUE:	-> Harris, Catherine		

GEORGE W. HOLT, Esq.  
Johnson Schachter & Collins  
Attorneys for SIERRA JOINT  
COMMUNITY COLLEGE  
DISTRICT .....

\$ 1,900.00

*[Signature]*  
OK to pay

Thank you.

Federal Tax I.D. Number: 68-0074878

P.O. Coming  
Reg. # 330988

**PROVED**

Wmelle 3/10/04

**Employee Time Record Sheet for Mandate Cost of  
961/75 Collective Bargaining**

District: Sierra Joint Community College Fiscal Year: 2002-2003

Employee Name: John Bukey Atty. Legal Counsel: \_\_\_\_\_  
Exact Position Title: \_\_\_\_\_

School/Department/Location: Rocklin Campus Telephone #: (916) 371-4691 Work year length: 12mo/11mo/10mo/hrly

**Reimbursable Activities:**

- Code 1: Determining Bargaining Units and Exclusive Representation
- Code 2: Election of Unit Representation
- Code 3: Negotiations (Preparation and "At-table")
- Code 4: Impasse Proceedings
- Code 5: Agreement Disclosure
- Code 6: Contract Administration (except "Grievances")
- Code 7: Unfair Labor Practice Charges.

**NOTE: Only one code entry per line.**

Date	Activity Code (Circle One)	Activity (List Topic)	Barg. Unit	Duration Hrs/min	Sub Reg'd?
10/8/02	1 2 <b>3</b> 4 5 6 7	Closed Sessions of the Board of	FUSE	25 min	Y <b>N</b>
1/14/03	1 2 <b>3</b> 4 5 6 7	Trustees - Conference with District	SCFA	55 min	Y <b>N</b>
2/11/03	1 2 <b>3</b> 4 5 6 7	Labor Negotiator		28 min	Y <b>N</b>
3/11/03	1 2 <b>3</b> 4 5 6 7		↓	10 min	Y <b>N</b>
/ /	1 2 3 4 5 6 7	FUSE = Federation of United School			Y N
/ /	1 2 3 4 5 6 7	Employees (Classified	all		Y N
/ /	1 2 3 4 5 6 7	Bargaining Unit)	claimed on		Y N
/ /	1 2 3 4 5 6 7	SCFA = Sierra College Faculty	Atty's Schedule		Y N
/ /	1 2 3 4 5 6 7	Association (Faculty			Y N
/ /	1 2 3 4 5 6 7	Bargaining Unit)			Y N
/ /	1 2 3 4 5 6 7				Y N
/ /	1 2 3 4 5 6 7				Y N
/ /	1 2 3 4 5 6 7				Y N
/ /	1 2 3 4 5 6 7				Y N

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature: Sue Fisher for John Bukey Date: 9/30/03

If you have any questions, please contact Sue Fisher at (916) 781-0539

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_.

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Neal Allbee Associate Dean of Public Safety  
Employee Name Exact Position Title

Human Resources, Rocklin (916)781-6252 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
10/21/02	Met with Jo <u>Sumner</u> , Steve <u>Jung</u> & Michelle <u>Kalina</u> RE: part-time evals	SCFA	1 1/2 hr.		
10/31/02	Wrote up evaluation proposals	SCFA	1 hr.		
11/23/02	Worked on eval proposal with Stephanie <u>Guevara</u>	SCFA	1 hr.		

NA

} NPcert:  
3.5

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Employee signature: \_\_\_\_\_ Date: \_\_\_\_\_

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

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Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Neal Allbee Associate Dean of Public Safety  
Employee Name Exact Position Title

Human Resources, Rocklin (916)781-6252 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

*MD*

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
1/28/03	Met with Stephanie Guevara to rewrite evaluation forms and Article 19	SCFA	1 hr.		
1/30/03	Met with Stephanie Guevara and Morgan Lynn to discuss changes with faculty evaluation & rewrite	SCFA	½ hr.		

*NP cert:  
1.5*

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: *Neal Allbee* Date: 2/10/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Neal Allbee Associate Dean of Public Safety  
Employee Name Exact Position Title

Human Resources, Rocklin (916)781-6252 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
2/8/03	Work on Article 19 - Part-time instructor evaluations.	SCFA	1 hr.		
2/10/03	Work on evaluation forms - Article 19. E-mails; make phone calls on same issue	SCFA	1 hr.		
2/11/03	Work on Article 19 forms with Stephanie Guevara	SCFA	1 hr.		

NP

NP cert  
3.0

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: Neal Allbee Date: 3/7/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO BUSINESS OFFICE



**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Neal Allbee Associate Dean of Public Safety  
Employee Name Exact Position Title

Human Resources, Rocklin (916)781-6252 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
3/7/03	Met with Richard Alman & Stephanie Guevara to work on Evaluations Articles 17, 18, & 19.	SCFA	1 hr.		
3/18/03	Met with Ninette Dollesin & Stephanie Guevara to for organization/review of new evaluation instruments on Article 17, 18, & 19.	SCFA	1/2 hr.		

*ND*

} NP cert  
1.5

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: Neal Allbee Date: 4/2/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Neal Allbee Associate Dean of Public Safety  
Employee Name Exact Position Title

Human Resources, Rocklin (916)781-6252 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
4/4/03	Rewriting evaluation process and rating scale with Sue Johnson, Stephanie Guevara, Richard Alman, and Ninette Dollesin	SCFA	1 1/2 hrs.		
6/9/03	Work on improvements of evaluation process as approved at Table and prepare for printing with Stephanie Guevara and Jeanne Leland	SCFA	1 hr.		
	Claimed by Leland				

NP

} NP cert  
2.5

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: Neal Allbee Date: 6/18/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003


Mandy Davies Associate Vice-President, Student Dev. & Services  
Employee Name Exact Position Title

Student Services, Rocklin (916) 781-0525 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
3/27/03	Working on Revisions to Article 2 (FUSE)	FUSE	2 hrs.		

NP

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Employee signature:  Date: 4/1/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

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### Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Sue Drennon Personnel/Benefits Coordinator  
Employee Name Exact Position Title

Human Resources, Rocklin (916)781-0519 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
A) 12/5/02	Joint Labor Mgmt Committee Meeting	FUSE/SCFA/Mgmt.	1.5 hrs.	already taken	

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on schedule  
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EMPLOYEE CERTIFICATION: School district personnel maintain a record of the time spent on mandates in order for the district reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: \_\_\_\_\_ Date: \_\_\_\_\_

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

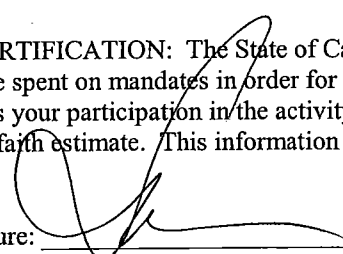
Susan Drennon Personnel/Benefits Coordinator  
Employee Name Exact Position Title

Human Resources (916)781-0519 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
2/27/03	Joint Labor Management Committee Meeting	SCFA/FUSE	3 hrs.	1.3 already	

Ken  
JLMC  
Prep  
1.7

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature:  Date: 3-5-03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO BUSINESS OFFICE

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra Fiscal Year: 2002-03  
 Employee Name: Jusan Drennon Exact Position Title: Personnel/Benefits Coord  
 Dept. & Location #: HR Telephone #: 781-0519 Work year length: 12mo/11mo/10mo/hrly

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
AI 1/23/03	JLMC		1-3p.m.	already taken	
2/27/03	JLMC		1-3p.m.	already taken	
3/27/03	JLMC		1-3p.m.	already taken	
AG 4/19/03	Grievance - David Fay		3-4p.m.		
1/1	Sick Leave				
AI 4/24/03	JLMC		1-3p.m.		
1/1					
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EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature: [Signature] Date: 9-24-03

If you have any questions, please contact (916) 781-0519 at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

### Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Carla Epting-Davis Associate Dean, Student Services  
Employee Name Exact Position Title

Student Services, Rocklin (916) 789-2939 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
12/4/02	Met with Becky (Poland) to discuss lead assignments	FUSE	½ hr.		
1/7/03	Met with Gail (Modde) & Becky Poland RE: lead role opportunities	FUSE	½ hr.		

NP/COS } 1.0

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Employee signature: *Carla Epting-Davis* Date: 2/5/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

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if not duped*

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Carla Epting-Davis Associate Dean, Student Services  
Employee Name Exact Position Title

Student Services, Rocklin (916) 789-2939 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
2/4/03	Researched SCFA contract language regarding assignable days and hours. Needed clarification for meeting with faculty.	SCFA	½ hr.		
2/10/03	Reviewing the proposal from FUSE regarding changes to Article 2 with Mandy Davies and Tina Ludutsky-Taylor via Conference call. <i>claimed by Ludutsky</i>	FUSE	1 hr.		

AI  
↓

} 1.5

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Employee signature: *Carla Epting-Davis* Date: 3/7/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO BUSINESS OFFICE



### Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Carla Epting-Davis Associate Dean, Student Services  
Employee Name Exact Position Title

Student Services, Rocklin (916) 789-2939 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
3/20/03	Work with Mandy Davies & Tina Ludutsky-Taylor on response to proposal for students, temps, volunteers, substitutes.	FUSE	1 hr. 45 min.		

AI

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: [Signature] Date: 3/30/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

for

CB2.2

### Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Carla Epting-Davis Associate Dean, Student Services  
Employee Name Exact Position Title

Student Services, Rocklin (916) 789-2939 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
4/2/03	Article 2 contract interpretation with Mandy Davies	FUES	1 hr.		
4/4/03	Article 2 contract interpretation with Mandy/Davies	FUES	2 hrs.		

AI  
↓

} 3.0

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: Carla Epting-Davis Date: 6/17/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Dolly Green Acting Manager HR/EEO  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 789-2601 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
8/1/02	Met with Jory Hadsell, Ron <u>Martinez</u> , Carla <u>Epting</u> Davis and Dee McKenzie RE: side letter agreement for employee reassignment	FUSE	½ hr.		
8/13/02	Met with Morgan <u>Lynn</u> & Mary <u>Conway</u> - retreat rights from Ed. Admin. to faculty	SCFA	1 hr.		
8/14/02	Met with Mandy <u>Davies</u> and Wendy <u>Rehwald</u> RE: faculty unsafe clinical practices in Health Center	SCFA	2 hrs.		
8/14/02	Met with Michelle <u>Kalina</u> , Don Cosper, Soundera Navadereen RE: part-time evaluation issues	SCFA	1 hr.		
8/30/02	Met with Doug <u>Smith</u> , George Holt, Ron <u>Martinez</u> RE: issues at Roseville Gateway related to classified staff	FUSE	1 ½ hrs.		
11/20/02	Met with Mandy <u>Davies</u> , Morgan <u>Lynn</u> , Wendy <u>Rehwald</u> RE: Nursing issues with faculty in Health Center	SCFA	1 hr.		
11/22/02	Met with Margaret Reineking RE: conflict with supervisor pertaining to evaluation	FUSE	1 ½ hr.		
12/2/02	Met with Margaret Reineking & Neal <u>Allbee</u> - facilitated mediation between manager & classified employee	FUSE	2 ½ hrs.		
1/16/03	Met with Carla Epting-Davis & Mandy Davies RE: classified employee performance	FUSE	1 hr.		
1/19/03	Telephone conversation with Sandra McDonald regarding status of settlement from litigation	SCFA	1 hr.		
1/21/03	Email with George Holt (attorney) & Sandra McDonald. Discussion with Robert Wickstrom & Kevin Ramirez	SCFA	1 ½ hr.		

*Contr. Admin*

*11 total*

*(CCO) X X X*

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: *Dolly M. Green* Date: \_\_\_\_\_

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

### Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Dolly Green Manager HR/EEO  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 789-2601 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
X 1/16/03	Discussion with Sandra McDonald regarding settlement with District and status of action pending	SCFA	½ hr.		
X 1/17/03	Phone discussion with George Holt to discuss Sandra McDonald & Connie Sturm's status of settlement agreement. Left phone message for McDonald regarding overview of Holt's discussion	SCFA	½ hr.		

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: *Dolly Green* Date: 1/27/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

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**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Dolly Green Acting Manager HR/EEO  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 789-2601 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
X 1/22/03	Met with Sandra McDonald to discuss status of pending settlement	SCFA	½ hr.		
X 1/30/03	Continued follow-up on McDonald/Sturm settlement; phone contact with Sandra McDonald	SCFA	½ hr.		

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: *Dolly Green* Date: \_\_\_\_\_

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

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**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Dolly Green Acting Manager HR/EEO  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 789-2601 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
2/4/03	Phone discussion w/George Holt regarding message from Mia Sinclair about settlement agreement status. Follow-up with Robert Wickstrom and Sandra McDonald.	SCFA	1 hr.		
2/5/03	Phone discussion with Sandra McDonald regarding settlement issue. E-mail correspondence from Sandra McDonald regarding attorney information forward.	SCFA	½ hr.		
2/19/03	Discussion with Sandra McDonald regarding status of settlement.	SCFA	½ hr.		
2/20/03	E-mail to attorney regarding McDonald and Sturm settlement and follow-up.	SCFA	½ hr.		
2/28/03	Phone discussion with Sandra McDonald regarding settlement agreement.	SCFA	½ hr.		

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: *Dolly M Green* Date: 3/5/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Dolly Green Acting Manager HR/EEO  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 789-2601 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
3/19/03	Meeting w/Eunis Benecke regarding Fact Finding related to ADA issues and potential grievance.	FUSE	1.5 hrs.		
3/20/03	Meeting w/Morgan Lynn & Heather McClogan regarding tenure issues.	SCFA	1/2 hr.		
3/20/03	Meeting w/Tina Ludutsky-Taylor & Heather McClogan regarding tenure issue for fact finding	SCFA	1 hr.		
3/21/03	Meet w/Heather McClogan and Neal Allbee regarding tenure process issues for fact finding	SCFA	1 hr.		
3/21/03	Meet w/Lawrence Lee & David Hay regarding fact finding related to confidential memo/grievance.	FUSE	1 hr.		
3/24/03	Performance & tenure evaluation discussion regarding issues/concerns with Heather McClogan.	SCFA	2 hr.		
3/28/03	Meeting w/Neal Allbee & Health McClogan to discuss faculty tenure process and issues.	SCFA	1 hr.		

FP Total  
3.5

AI Total  
3.0

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FP  
AI  
AI

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: *Dolly Green* Date: 4/3/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Dolly Green Manager HR/EEO  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 789-2601 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
3/14/03	<i>both claimed by Martinez</i> Met with Ron Martinez, George Holt, Sue Helwick, Lawrence Lee regarding David Hay's sick leave	FUSE	1 hr.		
3/21/03	Met with Lawrence Lee regarding David Hay	FUSE	1 hr.		
3/21/03	Met with Neal Allbee regarding Heather McColgan	SCFA	1 ½ hrs.		
3/24/03	Met with Heather McColgan	SCFA	2 hrs.		
3/27/03	Met with Shari Newman regarding David Hay & Eunice Benecke	FUSE	1 hr.		
3/28/03	Met with Neal Allbee regarding Heather McColgan	SCFA	1 hr.		
4/3/03	Met with Neal Allbee & Heather McColgan	SCFA	2 hrs.		
4/3/03	Facilitated meeting between Neal Allbee & Heather McColgan	SCFA	2 hrs.		
4/23/03	Met with Deb Sutphen regarding Heather McColgan	SCFA	1 ½ hrs.		
5/1/03	Met with Steve Jung regarding Alex Wong	SCFA	1 hr.		
5/7/03	Met with Morgan Lynn	SCFA	½ hr.		
5/9/03	Met with Morgan Lynn, Tina Ludutsky-Taylor, Neal Allbee & Ron Martinez regarding Heather McColgan	SCFA	2 hrs.		
5/12/03	Met with Karen Parker regarding Heather McColgan	SCFA	1 hr.		
5/22/03	Met with Shari Newman regarding employee's reassignment to another position/promotional concerns	FUSE	½ hr.		
5/27/03	Met with Neal Allbee & Heather McColgan	SCFA	2 hrs.		
5/28/03	Met with Sandra Scott and Maggie Green	FUSE	1 hr.		
5/28/03	Met with Sue Keller and Maggie Green	FUSE	½ hr.		

AI

Total:  
21.5

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: *Dolly Green* Date: \_\_\_\_\_

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_



**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Stephanie Guevara Interim Associate Dean, Business Tech.  
Employee Name Exact Position Title

Human Resources, Rocklin (916)789-2635 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
12/13/02	Met with Craig (Kelly) RE: Evaluation forms	SCFA	¼ hr.		

*Cont Admin*

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EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: \_\_\_\_\_ Date: \_\_\_\_\_

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Stephanie Guevara Interim Associate Dean, Business Tech.  
Employee Name Exact Position Title

Business Tech, Rocklin (916)789-2635 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
2/17/03	Changes to customized student surveys.	SCFA	3 hrs.		
2/24/03	Preliminary work on Department Chair evaluation process.	SCFA	1 hr.		
2/24/03	Changes to customized student surveys.	SCFA	1 hr.		
2/26/03	Changes to customized student surveys.	SCFA	3 hr.		

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**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: *Stephanie Guevara* Date: 3/10/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Darlene Jackson Associate Dean, Child Development Centers  
Employee Name Exact Position Title

Child Dev. Centers, Rocklin (916) 789-7158 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
10/1/02	Worked with Dianne <del>Malfa</del> <sup>claimed by Malfa</sup> to prepare and organize documents for meeting with George Holt regarding FUSE vs. Sierra College on CDC.	FUSE	2 hrs.		
10/4/02	Met with George Holt in Auburn regarding case preparation for FUSE vs. Sierra College CDC.	FUSE	2 hrs.		
10/7/02	Traveled to Sacramento with Ron <del>Martinez</del> for hearing for FUSE vs. Sierra College CDC.	FUSE	7 hrs.		
10/14/02	Worked with Dianne <del>Malfa</del> reading and responding to George Holt's E-mails regarding FUSE vs. Sierra College CDC.	FUSE	1/2 hr.		
2/4/03	Phone discussion with George Holt regarding FUSE vs. Sierra College upcoming meeting. Faxing documents.	FUSE	1/2 hr.		
2/10/03	Working with Dianne <del>Malfa</del> composing information for meeting with George Holt and Jon Byerrum.	FUSE	2 hrs.		
2/12/03	Met with George Holt and Jon Byerrum to prepare for hearing for FUSE vs. Sierra College CDC	FUSE	3 hrs.		
2/13/03	Phone calls to George Holt and Ron <del>Martinez</del> regarding FUSE vs. Sierra College CDC.	FUSE	1/2 hr.		
2/18/03	Court hearing in Sacramento with Ron <del>Martinez</del> re: FUSE vs. Sierra College CDC	FUSE	5 hrs.		

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Total:  
NP class  
22.5

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: *Darlene A Jackson* Date: 3/11/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Tina Ludutsky-Taylor Provost  
Employee Name Exact Position Title

Nevada County Campus (530) 274-5320 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
12/12/03	Meeting w/SCFA Negotiating Team re: faculty seniority/equity	SCFA	2 hrs.		
2/6/03	Meeting w/SCFA Negotiating Team re: faculty seniority/equity	SCFA	2.5 hrs.		
2/10/03	Working w/Mandy Davies & Carla Epting-Davis on Article 2 <i>Both claimed by Epting-Davis</i>	FUSE	1.5 hrs.		
2/20/03	Meeting w/SCFA Negotiating Team re: faculty seniority/equity	SCFA	1 hr.		
3/6/03	Meeting w/SCFA Negotiating Team re: faculty seniority/equity	SCFA	½ hr.		
3/20/03	Working w/Mandy Davies & Carla Epting-Davis on Article 2 <i>Both claimed by Epting-Davis</i>	FUSE	1 ¼ hrs.		

TOTALS  
NP cert: 6.0  
NP class: 2.8

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: *Tina Ludutsky-Taylor* Date: 4/2/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

### Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Morgan Lynn Assist. Superintendent/Vice President, Educational Programs and Services  
Employee Name Exact Position Title

Human Resources, Rocklin (916)781-0543 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
5/22/02	Met with Ron Martinez RE: ECE & HD	SCFA	½ hr.		
5/22/02	Met with Gary Guckel & Don Cospere	SCFA	½ hr.		
6/19/02	Met with Don Cospere, Ninette Dollesin & Alex Amigo RE: increasing efficiency	SCFA	2 hrs.		
6/19/02	Met with Don Cospere RE: Gary Guckel	SCFA	1 hr.		
8/12/02	Met with Ron Martinez & Doug Smith RE: productivity	SCFA	2 hrs.		
8/26/02	Met with Don Cospere RE: Gary Guckel	SCFA	½ hr.		
8/16/02	Met with Ron Martinez, Michelle Kalina, Tina Ludutsky-Taylor, Darlene Jackson	SCFA	2 hrs.		
12/11/02	Met with Don Cospere RE: James Maxey	SCFA	½ hr.		

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Contract  
Admin  
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Total  
5.0

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: \_\_\_\_\_ Date: \_\_\_\_\_

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Morgan Lynn Assist. Superintendent/Vice President, Educational  
Employee Name Programs and Services  
Exact Position Title

Human Resources, Rocklin (916)781-0543 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

AI

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
1/10/03	Meeting with Jim Weir & Don Coper to discuss process used for canceling part-time sections	SCFA	½ hr.		

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: Morgan Lynn Date: \_\_\_\_\_

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Dianne Malfa A.A. Child Development Centers  
Employee Name Exact Position Title

Child Dev. Centers, Rocklin (916)781-6252 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
9/30/02	Called George Holt as directed by Ron Martinez to set up meeting between Darlene Jackson and George Holt to discuss FUSE vs. Sierra College CDC case.	FUSE	½ hr.		
10/1/02	Phone calls to secure vehicle for Ron Martinez and Darlene Jackson to drive to preliminary hearing in Sacramento. Call to re-arrange calendar for Darlene Jackson.	FUSE	½ hr.		
10/4/02	Time on phone with George Holt; doing research on whether GVSD is unionized. FUSE vs. Sierra College CDC.	FUSE	½ hr.		
1/24/03	Calls to Ron Martinez's office to set up meeting with George Holt at NCC and follow-up correspondence.	FUSE	½ hr.		

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**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: Dianne Malfa Date: 3/10/03  
If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College

Fiscal Year: 2001-2002

Judy McClymonds

Admin. Assist., Personnel

Employee Name

Exact Position Title

Human Resources

(916) 781-0572

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
/ /	See attached appointments for Vance	FUSE	classified		
/ /	Jacobson dealing with Conversion				
<del>/ /</del>	October 7, 8 & 9, 9-5:00PM	(8)	x 3 days =	(24)	
/ /	October 28, 29, 30 & 31, 9-5:00PM	(8)	x 4 days =	(32)	
/ /	November 19, 21, 9-5:00PM	(8)	x 2 days =	(16)	
/ /					
/ /				Total	(72)
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NP

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature Judy McClymonds

Date 11/20/02

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_



## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College

Fiscal Year: 2001-2002

Judy McClymonds

Admin. Assist., Personnel

Employee Name

Exact Position Title

Human Resources

(916) 781-0572

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
11/ 20/ 02	See attached - Negotiation Recollections,				
/ /	Faculty (SCFA)				
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*Did we  
send a <sup>yes</sup>  
doc Req + we  
have  
for times?*

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature Judy McClymonds

Date 11/20/02

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College

Fiscal Year: 2001-2002

Judy McClymonds  
Employee Name

Admin. Assist., Personnel  
Exact Position Title

Human Resources  
Dept. & Location #

(916) 781-0572  
Telephone #

12mo/11mo/10mo/hrly  
Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
11/20/02	See attached - Collective Bargaining				
/ /	Recollections, Classified (FUSE)				
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EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature Judy McClymonds

Date 11/20/02

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College

Fiscal Year: 2001-2002

Judy McClymonds

Admin. Assist., Personnel

Employee Name

Exact Position Title

Human Resource

(916) 781-0572

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
11/20/02	See attached recollections for Joint				
/ /	Labor Management Committee				
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EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature Judy McClymonds

Date 11/20/02

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

### Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Diane McKnight Assoc. Dean, Liberal Arts  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 789-2603 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
5/22/03	SCFA Negotiations	SCFA	2		
5/29/03	SCFA Negotiations	SCFA	1.5		

*Already claimed?  
NO*

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: Diane McKnight Date: 6/18/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

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## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Vicki Reader Business Services Supervisor  
Employee Name Exact Position Title

Business Services, Rocklin (916) 789-2610 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
4/3/03	Met with Shari Newman to discuss grievance filed regarding Article 2 and Article 29	FUSE	1 hr.		

AG

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: Vicki Reader Date: 4/3/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

## Employee Time Record Sheet for Mandated Costs of 486/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

Beverly Wharff Personnel/Recruitment Coordinator, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 789-2970 12 mon./11 mon./10mon./hrly  
School/Dept./Location Telephone # Work year length

- Reimbursable Activities:** *Annual Reimbursement Claims Only.*
- Code 1: Staff time to collect and organize data to be used for claim preparation.
  - Code 2: Staff time and/or consultant cost to prepare state claim forms.
  - Code 3: Staff time and/or consultant cost for district inservice mandate reimbursement training
  - Code 4: Staff time, seminar fees, travel and lodging expenses for outside of District mandate reimbursement training
  - Code 5: Staff time to resolve payment disputes with the State Controller's Office
  - Code 6: Other - describe fully

**NOTE: Only one code entry per line.**

Date	Activity Code (circle one):	Describe Activity	Claim worked on:	Hrs./Min.	Materials Costs & Expenses
May 20, 2003	1 2 3 4 5 6	Scheduling, canceling and rescheduling appts. with classified staff and Vance Jacobson to discuss job descriptions.	5/01/03	1 hr.	5.0
May 20, 2003	1 2 3 4 5 6	Scheduling, canceling and rescheduling appts. with classified staff and Vance Jacobson to discuss job descriptions	5/02/03	1 hr.	
May 20, 2003	1 2 3 4 5 6	Scheduling, canceling and rescheduling appts. with classified staff and Vance Jacobson to discuss job descriptions	5/05/03	1 hr.	
May 20, 2003	1 2 3 4 5 6	Scheduling, canceling and rescheduling appts. with classified staff and Vance Jacobson to discuss job descriptions	5/06/03	1 hr.	
May 20, 2003	1 2 3 4 5 6	Scheduling, canceling and rescheduling appts. with classified staff and Vance Jacobson to discuss job descriptions.	5/07/03	1 hr.	
	1 2 3 4 5 6				

*Don't Admin*

**Attach:** All documentation available to substantiate reported time and expenses. This can include meeting agendas, seminar agendas, calendar notes, seminar expenses, travel expense and reimbursement, and supplies

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the data for state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you have reported actual data or have provided a good faith estimate. This information is used for ~~don't~~ accounting purposes only.

Employee signature: *Beverly Wharff* Date: 5/20/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_; TO \_\_\_\_\_

### Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2002-2003

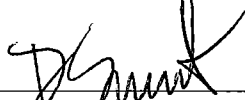
Doug Smith Assistant Superintendent/Vice President,  
Employee Name Finance & Administration  
Exact Position Title

Human Resources, Rocklin (916) 781-0546 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
12/18/02	Meet with Shana Saichek, benefit consultant, to discuss JLMC side letter language and contract Proposal	SCFA/FUSE	½ hr.		
1/10/03	Meet with Don Cospoer & Ron Martinez to discuss SCFA Negotiation Planning <i>claimed by Martinez</i>	SCFA	1 ½ hrs.		

AI  
NP

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature:  Date: 10/1/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2002-2003

Doug Smith VP Finance & Administration  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0546 12 mon/11 mon./10mon./hrly  
Dept. & Location Telephone #

NP  
NP  
NP  
↓  
NP

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
8/14/02	Meeting with Don Cosper, & Ron Martinez to discuss faculty salary issues <i>claimed</i>	SCFA	1 ¼ hrs		
8/26/02	Meeting with Ron Martinez to prepare to update Board of Trustees on negotiations and retiree benefits	SCFA/FUSE	1 ¼ hr .6 ea		
8/28/02	Recalculate faculty salary formula	SCFA	2 ½ hr		
8/30/03	Meeting with Ron Martinez and Don Cosper to discuss faculty negotiation issues	SCFA	1 ½ hr		
9/4/02	Meeting with Ron Martinez and Jeanne Leland to discuss faculty negotiations <i>both claimed on Leland's log</i>	SCFA	1 hr		
9/5/02	Meeting with Ron Martinez, Jeanne Leland, John Bukey and health benefit consultant	SCFA/FUSE	1 hr .5 ea		
9/6/02	Recalculate faculty salary formula document	FUSE	4 hrs		
9/16/02	Meeting with Ron Martinez for conference call with benefits actuary for JLMC	SCFA/FUSE	1 hr .5 ea		
9/16/02	Meeting with Ron Martinez and Don Cosper to discuss retiree and faculty issues	SCFA	1 hr		
9/25/02	Recalculate Faculty salary formula	SCFA	¾ hr		
10/4/02	Recalculate Classified salary formula	FUSE	8 hrs		
10/21/02	Meeting with Jim Weir, Don Cosper, Ron Martinez regarding PT faculty issues	SCFA	½ hr		
10/23/02	Meeting with Dennis Daugherty (actuary), Dennis Lee (health benefits consultant), Ron Martinez Don Cosper, Robert Wickstrom regarding retiree actuarial report	SCFA/FUSE	2 ¾ hr 1.4 ea		
11/1/02	Meeting with Jory Hadsell, Shari Newman, Ron Martinez to discuss classified release time	FUSE	1 hr		
11/1/02	Meeting with Vicki Reader to discuss PERS (classified staff retirement) calculations	FUSE	¾ hr		
11/11/02	Recalculate faculty and classified salary formulas for 02-03 and 03-04	FUSE/SCFA	2 ½ hrs 1.2 ea		
11/4/02	Meeting with Jory Hadsell, Robert Wickstrom and Vicky Reader to review classified salary formula	FUSE	1 hr		
11/14/02	Recalculate faculty and classified salary formulas 02-03 and 03-04	FUSE/SCFA	3 hrs 1.5 ea		
12/4/02	Meeting with Ron Martinez and Don Cosper regarding faculty negotiations issues	SCFA	¾ hr		
12/19/02	Meeting with Don Cosper, Ron Martinez and Morgan Lynn regarding faculty negotiations issues	SCFA	1 ¾ hrs		
1/27/03	Meeting with Don Cosper and Ron Martinez for	SCFA	1 ¼ hr		

Total: NP cat. - 18.7  
1/1/03 NP class. - 30.5



NP  
NP

	faculty negotiations planning				
2/12/03	Meeting with Jory Hadsell regarding classified salary formula	FUSE	2 ¼ hr		
2/25/03	Meeting with Shari Newman and Ron <del>Martinez</del> to discuss retiree incentive	FUSE	1 ¼ hr		
3/4/03	Meeting with Ron <del>Martinez</del> , Jeanne <del>Leland</del> , Vicki <del>Reade</del> for negotiations prep <i>claimed by Mart. + Leland</i>	FUSE	1 hr		
3/26/03	Meeting with Shari Newman and Ron <del>Martinez</del> to discuss retirement incentive	FUSE	1 hr		
3/27/03	Meeting with Ron <del>Martinez</del> , Robert <del>Wickstrom</del> and Dennis Lee (health benefit consultant) to discuss health benefits	FUSE/SCFA	1 ¾ hr 900		
4/2/03	Meeting with Shari Newman to discuss retirement incentive	FUSE	¼ hr		
4/2/03	Meeting with Don Cospers to discuss retirement incentive	SCFA	½ hr		
4/11/03	Meeting with Jory Hadsell to discuss classified negotiation issues	FUSE	1 ¾ hr		
5/1/03	Meeting with Jory Hadsell to discuss classified salary formula	FUSE	1 ¼ hr		
5/8/03	Meeting with Jory Hadsell and Shari Newman regarding classified salary formula	FUSE	1 ¾ hr		
5/16/03	Meeting with Don Cospers and Ron <del>Martinez</del> regarding faculty formula and retirement incentive	SCFA	1 ½ hr		
6/12/03	Meeting with Jory Hadsell regarding classified salary formula	FUSE	¾ hr		
6/17/03	Meeting with Jory Hadsell regarding classified salary formula	FUSE	1 ¼ hr		

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: *[Signature]* Date: 10/1/03  
 If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_  
 PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

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Total NP cert - 2.9  
 1/1/03 NP class - 14.8

Doug Smith's  
Logs

**MANDATED COST TRACKING FORM**

Complete a separate form for each activity

Date: <u>2/10/03</u>		Time: <u>30 min</u> 0.5 (nearest 1/4 hour)	
Parties Present: <u>Doug Smith</u> <u>Ron Martinez</u> <u>Jeanne Selmond</u> <u>John P. Kelly Atty.</u>			
Grievant's Name:			
Description (include section of contract being discussed): <u>Prep for FUSE negotiations</u>			
Unions (circle one): SCFA <u>FUSE</u>			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	<u>NN</u>	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds			

NP

**MANDATED COST TRACKING FORM**  
Complete a separate form for each activity

<b>Date:</b> 2/24/03	<b>Time:</b> 9:15 - 10:20 (nearest 1/4 hour)		
<b>Parties Present:</b> Doug Smith, Jeanne [unclear], Ron [unclear], John [unclear] already claimed on Leland's and Martinez			
<b>Grievant's Name:</b>			
<b>Description (include section of contract being discussed):</b> <i>Negotiation Prep</i>			
<b>Unions (circle one):</b>			
<input checked="" type="radio"/> SOFA <input type="radio"/> FUSE			
<b>Activity Codes (circle one):</b>			
<b>Code</b>	<b>Description</b>	<b>Code</b>	<b>Description</b>
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	<input checked="" type="radio"/> NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds			

MP

**MANDATED COST TRACKING FORM**  
 Complete a separate form for each activity

Date: <u>3/16/03</u>	Time: <del>11:30</del> <u>2:00 pm</u> (nearest 1/4 hour) <span style="float:right">0.5</span>		
Parties Present: <u>Don Cooper</u> <u>Doug Smith</u> <u>Ron Masturcy</u> <u>Jeanne [unclear]</u> <u>John Byley</u>			
Grievant's Name:			
Description (include section of contract being discussed): <u>Negotiating</u> <span style="float:right">NF</span>			
Unions (circle one): <input checked="" type="radio"/> SCFA <input type="radio"/> FUSE			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	<input checked="" type="radio"/> NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds			

**MANDATED COST TRACKING FORM**  
Complete a separate form for each activity

Date: <u>3/20/03</u>	Time: <u>1:00 - 2:00 pm</u> (nearest 1/4 hour) <span style="float:right;">①</span>		
Parties Present: <u>Don Coffey</u> <u>Doug Smith</u> <u>Ron Martinez</u> claimed			
Grievant's Name: <u>by Martinez</u>			
Description (include section of contract being discussed):  <u>Prep for negotiations</u>			
Unions (circle one):  <u>SCFA</u> FUSE			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	<u>NN</u>	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds			

NP

## Employee Time Record Sheet for Mandated Cost of 961/75 Collective Bargaining

08 1.00

District: Sierra Joint Community College

Fiscal Year: 2002-2003

Doug Smith  
Employee Name

Vice President, Finance & Administration  
Exact Position Title

Rocklin Campus                      (916) 781-0546  
School/Department/Location      Telephone #

12mo/11mo/10mo/hrly  
Work year length

**Reimbursable Activities:**

- Code 1: Determining Bargaining Units and Exclusive Representation
- Code 2: Election of Unit Representation
- Code 3: Negotiations (Preparation and "At-table")
- Code 4: Impasse Proceedings
- Code 5: Agreement Disclosure
- Code 6: Contract Administration (except "Grievances")
- Code 7: Unfair Labor Practice Charges

NOTE: Only one code entry per line.

NP  
↓

Date	Activity Code (Circle One)	Activity (List Topic)	Barg. Unit	Duration Hrs/min	Sub Req'd?
08/27/02	1 2 (3) 4 5 6 7	Closed Sessions of the Board of	FUSE	45 min	Y (N)
10/8/02	1 2 (3) 4 5 6 7	Trustees - Conference with District	SCFA	25 min	Y (N)
11/12/02	1 2 (3) 4 5 6 7	Labor Negotiator		59 min	Y (N)
1/14/03	1 2 (3) 4 5 6 7			55 min	Y (N)
2/11/03	1 2 (3) 4 5 6 7	FUSE = Federation of United School		28 min	Y (N)
3/11/03	1 2 (3) 4 5 6 7	Employees (Classified		10 min	Y (N)
4/8/03	1 2 (3) 4 5 6 7	Bargaining Unit)	✓	25 min	Y (N)
/ /	1 2 3 4 5 6 7	SCFA = Sierra College Faculty			Y N
/ /	1 2 3 4 5 6 7	Association (Faculty			Y N
/ /	1 2 3 4 5 6 7	Bargaining Unit)			Y N
/ /	1 2 3 4 5 6 7				Y N
/ /	1 2 3 4 5 6 7				Y N
/ /	1 2 3 4 5 6 7				Y N

NP class:  
.8  
1/1/03  
NP cert:  
3.4°

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature *Doug Smith*                      Date 9/30/03

If you have any questions, please contact Sue Fihser at (916) 781-0539

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_.

6

**MANDATE REIMBURSEMENT SERVICES**

**PRODUCTIVE HOURLY RATE UPDATE**

Note: Please provide the rates for the FY: 02-03 the missing rates for FY: 01-02.

COMMUNITY COLLEGE DISTRICT Sierra Joint Community College District Fiscal Years:

Name	Title	01-02	02-03
	AVERAGE ADMINISTRATIVE ASSISTANT		
	AVERAGE ADMINISTRATIVE SECRETARY		
	AVERAGE ASSOCIATE DEAN	\$	73.81
	AVERAGE DEAN	\$	78.11
	AVERAGE EXECUTIVE SECRETARY		
	AVERAGE FACULTY		
	AVERAGE PRESIDENT		
	AVERAGE VICE PRESIDENT		
ALLBEE, NEAL	ASSOC. DEAN, PUBLIC SAFETY	\$ 79.32	\$ 79.47
BASQUE, JOAN	ADMINISTRATIVE ASSISTANT	\$ 37.66	\$ 38.76
BATES, MARTY	SR COMPUTER OPERATOR	\$ 48.36	\$ 49.65
BERMAN, NANCY	DEAN OF BUSINESS HIGH TECH.	\$ 88.62	\$ -
BIRDSONG, CYNDIE	PAYROLL TECHNICIAN	\$ -	\$ 25.07
BRIDGES, KAREN	ADMINISTRATIVE SECRETARY	\$ 26.31	\$ 27.32

Pres = Kevin Ramirez

Sierra

## MANDATE REIMBURSEMENT SERVICES

Name	Title	01-02	02-03
CLARKSON, STEPHEN	CLASS/GROUNDS MAINTENANCE, II	\$ 33.23	\$ 35.29
CONWAY, MARY	DEAN OF PHYSICAL EDUCATION	\$ 78.58	\$ 78.73
CORBETT, DIANE	CLASS/ADMINISTRATIVE ASSISTANT I	\$ 46.28	\$ 47.49
COSPER, DONALD	FACULTY	\$ 168.85	\$ 169.17
CUNNINGHAM, RAY	ASSISTANT DIRECTOR OF PLANT OPERATIONS	\$ 45.07	\$ 53.59
DAVIS, MANDY	DEAN, STUDENT SERVICES	\$ 85.85	\$ 86.02
DOLLESIN, NINETTE	PROJECT MANAGER EP&S	\$ 49.38	\$ 51.15
DRENNON, SUE	PERSONNEL ASSISTANT <i>Personnel/Benefits Coordinator</i>	\$ 53.93	\$ 54.04
DUPIUS, JENNIFER	PAYROLL TECHNICIAN	\$ 28.70	\$ 29.22
ECHAVARRIA, RUTH	ADMINISTRATIVE ASSISTANT	\$ 34.72	\$ 37.26
EPTING-DAVIS, CARLA	DIRECTOR	\$ 73.09	\$ 73.23
FISHER, SUE	EXECUTIVE SECRETARY/BOARD RECORDER	\$ 43.02	\$ 43.10
GIESZELMANN, ED	FACULTY	\$ 126.29	\$ 134.55
GIFFORD, NORMAN	ADMINISTRATIVE SERVICE TECH.	\$ 33.34	\$ 44.85
GOFF, ARLENE	FACILITIES PLANNING	\$ 41.74	\$ 43.52
GREEN, DOLLY	MGR OF DIVERSITY PROGRAMS	\$ 47.90	\$ 51.66
HALEY, BRIAN	DEAN; LEARNING RESOURCE CTR	\$ 77.96	\$ 78.11
HUTCHING, SHARON	ADMINISTRATIVE SECRETARY	\$ 44.92	\$ 45.01
JAMISON, DIANNE	ADMINISTRATIVE TECH III/SBDC ECONOMICS DEVELOPMENT	\$ 37.08	\$ 38.02



## MANDATE REIMBURSEMENT SERVICES

Name	Title	01-02	02-03
JUNG, STEPHEN	DEAN OF BUSINESS HIGH TECH.	\$ 75.73	\$ 80.95
KALINA, MICHELLE	ASSOCIATE DEAN, SCIENCE AND MATH	\$ 79.84	\$ 83.83
KLEINBACH, MARY	EXECUTIVE SECRETARY - EP&S	\$ 47.33	\$ 47.42
LEE, KELLY	PAYROLL TECHNICIAN	\$	\$ 25.07
LEE, LAWRENCE	ASST. VP. IT	\$ 85.85	\$ 86.02
LELAND, JEAN	PERSONNEL ASSISTANT	\$ 42.67	\$ 42.75
LUDUTSKY-TAYLOR, TINA	EXEC. DEAN-WNCC	\$ 88.73	\$ 88.90
LYNN, MORGAN	VP, EP & S	\$ 92.87	\$ 93.05
MARTINDALE, SHIRLEY	ADMIN. SECRETARY III	\$ 40.63	\$ 41.67
MARTINEZ, RON	DIRECTOR, HUMAN RESOURCES	\$ 88.62	\$ 94.39
MCCLYMONDS, JUDY	ADMIN. ASST.	\$ 38.70	\$ 39.69
MCDERMID, PATT	FACULTY FACILITATOR	\$ 152.42	\$ 159.22
MCLAUGHLIN, CAROLYN	ACCOUNTING TECHNICIAN	\$ 31.20	\$ 31.95
McKNIGHT, DIANE	ASSOC. DEAN LIBERAL ARTS	\$ 73.67	\$ 73.81
McVAY, SUSAN (WILLIAMS)	EXECUTIVE ASSISTANT OF PUBLICATION	\$ 67.97	\$ 68.11
NEWMAN, SHARI (JONES)	CLASS/COMMUNICATIONS. SERVICE TECH.	\$ 44.30	\$ 45.45
<del>RAMIREZ, KEVIN</del>	<del>PRESIDENT</del>	\$ 121.90	\$ 122.13
READER, VICKI	BUSINESS SERVICES SUPERVISOR	\$ 67.97	\$ 68.11
REHWALD, WENDE	COLLEGE HEALTH NURSE PRACTITIONER	\$ 114.02	\$ 127.49

X.05

894  
8383

## MANDATE REIMBURSEMENT SERVICES

Name	Title	01-02	02-03
REID, CORAL	ADMINISTRATIVE SERVICES TECH II	\$ 35.84	\$ 36.75
ROATH, LYNN	ENVIRONMENT HEALTH & SAFETY SPECIALIST	\$ 48.00	\$ 49.25
ROBERTS, MILLIE	EXECUTIVE SECRETARY	\$ 50.30	\$ 50.40
SANCHEZ, LUIS	FACULTY	\$ 126.79	\$ 129.27
SCHAEFFER, MARCELLE	PROGRAM MANAGER	\$ 49.03	\$ 49.19
SESSIONS, PAM	ADMIN. SERVICE TECH III	\$ 39.70	\$ 41.77
SHIELDS, TRACY	ADMIN SVCS TECH III-RECORDS/EVALUATIONS	\$ 38.70	\$ 39.69
SMITH, DOUG	VP FINANCE ADMIN.	\$ 85.75	\$ 85.93
SUMNER, JOANN	ASSOC DEAN CURRIC.	\$ 83.04	\$ 86.31
TSUJI, BILL	DEAN, LIBERAL ARTS	\$ 84.63	\$ 86.65
VELAZQUEZ, NILO	BOOKSTORE MANAGER	\$ 64.96	\$ 65.10
VERMILLION, RHONDA	PAYROLL TECHNICIAN	\$ 27.23	\$ 29.07
WALTERS-DUNLAP, KAREN	DEAN, SCIENCE AND MATH	\$	\$ 78.11
WHITE, MARGERET	ASSOC DIRECTOR NURSING	\$ 75.73	\$ 75.87
WICKSTROM, ROBERT	DIRECTOR OF BUSINESS SERVICES	\$ 88.62	\$ 88.79
WILSON, JAMES	INSTRUCTIONAL ASST. III	\$ 47.06	\$ 47.01
WOLLESEN, MARY	PROGRAM MANGER OF SBDC & ECONOMIC DEVELOPMENT	\$ 58.96	\$ 59.08

NAME	POSITION	PHR (PAY+BENE'S /PROD HRS)
DONNA BRAZIL	NCC SUPERVISOR / ADMIN SUPPORT	46.36
SUZANNE DAVENPORT	PROFESSOR / LRC COORDINATOR	103.65
FRANK DECOURTEN	DEAN, TAHOE / TRUCKEE	80.95
STEPHANIE GUEVARA	PROFESSOR BUSINESS	45.32
JOHN HAMBLIN	RESIDENCE LIFE SUPERVISOR	33.05
SUE HELWICK	MANAGER COMPUTER/NETWORK OPERATIONS	72.97
JAN HIGH	CONSULTANT	-
GEORGE HOLT	ATTORNEY	-
DARLENE JACKSON	ASSOCIATE DEAN - CHILD DEVELOPMENT CTR	70.67
VANCE JACOBSON	CONSULTANT	
MICHELLE KALINA	PROFESSOR - RESEARCH	42.76
CRAIG KELLEY	RESEARCH ANALYST	37.76
KAREN LINDE	ATHLETIC DIRECTOR	69.91
JENNIFER MACKAY	ASST PROGRAM MANAGER - COMMUNITY ED	33.99
DIANNE MALFA	ADMIN ASST - CHILD DEVELOPMENT CENTERS	38.87
SUE MICHAELS	SUPERVISOR - MARKETING / PUBLIC RELATIONS	49.96
GAIL MODDER	PROJECT MANAGER CUSTOMER SERVICES	43.99
SOUNDERA NAVADEREEN	PT INSTRUCTOR	51.18
DELECIA NUNNALLY	ASSOCIATE DEAN - STUDENT SERVICES	63.60
JAN PAULSON	MANAGER SYSTEMS/PROGRAMS	64.05
BECKY POLAND	ADMINISTRATIVE ASSISTANT - STUDENT SERVICES	32.28
JAN POWERS	COMMUNITY ED PROGRAM MANAGER	57.82
GREG SCHNEIDER	PURCHASING SUPERVISOR	39.12
LONNIE SCHWENK	CHIEF OF POLICE SERVICES	48.85
SANDRA SCOTT	DIRECTOR OF ECONOMIC DEVELOPMENT	74.75
TINA SILER	HR DEVELOPMENT ASSISTANT	36.11
CRAIG SMALLEY	DATA ADMIN / DIST SYST SEC MGR	64.93
SCOTT SNYDER	TECHNICAL SUPPORT SERVICES MANAGER	53.66
LAURIE THIERS	PROJECT MANAGER EP&S	41.71
JOHN VOLEK	DEAN - P.E. ATHLETICS	74.75
BEVERLY WHARFF	PERSONNEL TECHNICIAN	54.89
WOODROW WILSON	DIRECTOR, PLANNING AND RESEARCH	78.11
PHIL YORDE	TECHNICAL SUPPORT SERVICES MANAGER	52.99

~~COPY~~



<b>CLAIM FOR PAYMENT</b> Pursuant to Government Code Section 17561 <b>COLLECTIVE BARGAINING</b>	For State Controller Use only (19) Program Number 00232 (20) Date File ___/___/___ (21) LRS Input ___/___/___	<b>Program</b> <span style="font-size: 2em; font-weight: bold;">232</span>
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(01) Claimant Identification Number: CC31090	<b>Reimbursement Claim Data</b>	
(02) Claimant Name: Sierra Joint Community College District	(22) CB-1, (03)(1)(e)	0
County of Location: Placer	(23) CB-1, (03)(2)(e)	0
Street Address: 5000 Rocklin Road	(24) CB-1, (03)(3)(e)	186,517
City: Rocklin State: CA Zip Code: 95677	(25) CB-1, (03)(4)(e)	5,164

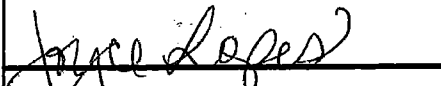
Type of Claim	Estimated Claim	Reimbursement Claim			
	(03) Estimated <input checked="" type="checkbox"/>	(09) Reimbursement <input checked="" type="checkbox"/>	(26) CB-1, (03)(5)(e)		0
	(04) Combined <input type="checkbox"/>	(10) Combined <input type="checkbox"/>	(27) CB-1, (03)(6)(e)		37,974
	(05) Amended <input type="checkbox"/>	(11) Amended <input type="checkbox"/>	(28) CB-1, (03)(7)(e)		4,993
			(29) CB-1, (04)(d)		153,653
Fiscal Year of cost	(06) 2004-2005	(12) 2003-2004	(30) CB-1, (04)(e)		234,648
Total Claimed Amount	(07) \$ 257,000	(13) \$ 234,496	(31) CB-1, (05)(e)		7,557
Less : 10% Late Penalty		(14) \$ -	(32) CB-1, (07)		208,872
Less : Prior Claim Payment Received		(15) \$ -	(33) CB-1, (11)		39
Net Claimed Amount		(16) \$ 234,496	(34) CB-1, (12)		25,624
Due from State	(08) \$ 257,000	(17) \$ 234,496	(35) CB-1, (14)		0
Due to State		(18)	(36) CB-1, (15)		0

**(37) CERTIFICATION OF CLAIM**

In accordance with the provisions of Government Code Section 17561, I certify that I am the officer authorized by the community college district to file mandated cost claims with the State of California for this program, and certify under penalty of perjury that I have not violated any of the provisions of Government Code Sections 1090 to 1098, inclusive.

I further certify that there was no application other than from the claimant, nor any grant or payment received, for reimbursement of costs claimed herein, and such costs are for a new program or increased level of services of an existing program. All offsetting savings and reimbursements set forth in the Parameters and Guidelines are identified, and all costs claimed are supported by source documentation currently maintained by the claimant.

The amounts for this Estimated Claim and/or Reimbursement Claim are hereby claimed from the State for payment of estimated and/or actual costs set forth on the attached statements. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Signature of Authorized Officer (USE BLUE INK)  _____ Joyce Lopes Type or Print Name	Date 1/4/05 _____ Director of Finance Title
--	---

(38) Name of Contact Person for Claim: SixTen and Associates

Telephone Number: (858) 514-8605

E-mail Address: kbsixten@aol.com

<b>Program</b> <b>232</b>	<b>MANDATED COSTS COLLECTIVE BARGAINING CLAIM SUMMARY</b>	<b>FORM CB-1</b>
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Claimant: Sierra Joint Community College District	(02) Type of Claim Reimbursement <input checked="" type="checkbox"/> Estimated <input type="checkbox"/>	Fiscal Year 2003-2004
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Rodda Act Direct Costs	Cost Elements				
(03) Reimbursable Components	(a) Salaries and Benefits	(b) Materials and Supplies	(c) Travel and Training	(d) Contract Services	(e) Total
1. Determining Bargaining Units and Exclusive Representation	\$ -	\$ -	\$ -	\$ -	\$ -
2. Election of Unit Representation	\$ -	\$ -	\$ -	\$ -	\$ -
3. Cost of Negotiations	\$ 61,353.31	\$ -	\$ -	\$ 125,163.70	\$ 186,517.01
4. Impasse Proceedings	\$ -	\$ -	\$ -	\$ 5,163.65	\$ 5,163.65
5. Collective Bargaining Agreement Disclosure	\$ -	\$ -	\$ -	\$ -	\$ -
6. Contract Administration	\$ 18,991.32	\$ -	\$ -	\$ 18,983.02	\$ 37,974.34
7. Unfair Labor Practice Charges	\$ 650.62	\$ -	\$ -	\$ 4,342.87	\$ 4,993.49
<b>(04) Total Rodda Act Direct Costs</b>	<b>\$ 80,995.26</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 153,653.24</b>	<b>\$ 234,648.50</b>

<b>Winton Act Direct Costs</b>					
(05) Base Year, 1974-75 Direct Costs	\$ 4,453.00	\$ -	\$ 104.00	\$ 3,000.00	\$ 7,557.00
(06) Base Year Direct Costs Adjusted by IPD	[Line (05)(e) x 3.411 for 2003-2004 F.Y.]				\$ 25,776.93
(07) Increased Direct Costs	[Line (04)(e) - line (06)]				\$ 208,871.57

<b>Indirect Costs</b>					
(08) Total Rodda Act Direct Costs less Contracted Services	[Line (04)(e) - line (04)(d)]				\$ 80,995.26
(09) Base Year Costs less Contracted Services adjusted by IPD	[Line (05)(e) - line (05)(d) x 3.411]				\$ 15,543.93
(10) Increased Direct Costs less Contract Services	[Line (08) - line (09)]				\$ 65,451.33
(11) Indirect Cost Rate	[Federally approved OMB A-21, FAM-29C, or 7%]				39.15%
(12) Increased Indirect Costs	[Line (10) x line (11)]				\$ 25,624.20
(13) Total Increased Direct and Indirect Costs	[Line (07) + line (12)]				\$ 234,495.77

<b>Cost Reduction</b>					
(14) Less: Offsetting Savings					\$ -
(15) Less: Other Reimbursements					\$ -
(16) <b>Total Claimed Amount:</b>	[Line (13) - {Line (14) + Line (15)}]				<b>\$ 234,495.77</b>

**SIERRA JOINT COMMUNITY COLLEGE DISTRICT  
CALCULATION OF INDIRECT COST RATE,  
FISCAL YEAR  
2002-2003**

FOR 03/04  
CLAMS

REFERENCE (CCFS 311)	DESCRIPTION	2002-2003
<b>INSTRUCTIONAL ACTIVITY</b>		
	<b>Instructional Costs</b>	
	Instructional Salaries and Benefits	25,235,043
	Instructional Operating Expenses	1,393,198
	Instructional Support Instructional Salaries and Benefits	0
	Auxiliary Operations Instructional Salaries and Benefits	0
	<b>TOTAL INSTRUCTIONAL COSTS 1</b>	<b>26,628,241</b>
	<b>Non-Instructional Costs</b>	
	Non-Instructional Salaries and Benefits	74,749
	Instructional Admin. Salaries and Benefits	2,871,099
	Instructional Admin. Operating Expenses	760,415
	Auxiliary Classes Non-Inst. Salaries and Benefits	0
	Auxiliary Classes Operating Expenses	0
	<b>TOTAL NON-INSTRUCTIONAL COSTS 2</b>	<b>3,706,263</b>
	<b>TOTAL INSTRUCTIONAL ACTIVITY COSTS 3 (1 + 2)</b>	<b>30,334,504</b>
<b>DIRECT SUPPORT ACTIVITY</b>		
	<b>Direct Support Costs</b>	
	Instructional Support Services Non Inst. Salaries and Benefits	1,671,428
	Instructional Support Services Operating Expenses	260,933
	Admissions and Records	1,476,483
	Counselling and Guidance	2,642,059
	Other Student Services	3,699,469
	<b>TOTAL DIRECT SUPPORT COSTS 4</b>	<b>9,750,372</b>
	<b>TOTAL INSTRUCTIONAL ACTIVITY COSTS AND DIRECT SUPPORT COSTS 5 (3 + 4)</b>	<b>40,084,876</b>
	<b>Indirect Support Costs</b>	
	Operation and Maintenance of Plant	4,188,443
	Planning and Policy Making	1,830,726
	General Instructional Support Services	9,673,637
	<b>TOTAL INDIRECT SUPPORT COSTS 6</b>	<b>15,692,806</b>
	<b>TOTAL INSTRUCTIONAL ACTIVITY COSTS AND DIRECT SUPPORT COSTS AND TOTAL INDIRECT SUPPORT COSTS (5 + 6) = TOTAL COSTS</b>	<b>55,777,682</b>
<b>SUPPORT COSTS ALLOCATION RATES</b>		
<b>Indirect Support Costs Allocation Rate =</b>	<b>Total Indirect Supports Costs (6)</b>	<b>39.15%</b>
	<b>Total Instructional Activity Costs and Direct Support Costs (5)</b>	
<b>Direct Support Costs Allocation Rate =</b>	<b>Total Direct Support Costs (4)</b>	<b>32.14%</b>
	<b>Total Instructional Activity Costs (3)</b>	
<b>Total Support Cost Allocation</b>		<b>71.29%</b>

**MANDATED COSTS**  
**COLLECTIVE BARGAINING**  
**COMPONENT/ACTIVITY COST DETAIL**

**FORM CB-2**

(01) Claimant: Sierra Joint Community College District  
 (02) Fiscal Year Costs Were Incurred: 2003-2004

(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

<input type="checkbox"/> Determining Bargaining Units and Exclusive Representation	<input type="checkbox"/> Collective Bargaining Agreement Disclosure
<input type="checkbox"/> Election of Unit Representation	<input type="checkbox"/> Contract Administration
<input checked="" type="checkbox"/> Cost of Negotiations	<input type="checkbox"/> Unfair Labor Practice Charges
<input type="checkbox"/> Impasse Proceedings	

(a) Employee Names, Job Classifications, Functions Performed,	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	Object Accounts			
			(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel	(g) Contract Services
<b>Preparing for negotiations</b>						
Leland, Jean Personnel Assistant	\$47.95	19.50	\$ 935.03			
Martinez, Ron Director, Human Resources	\$86.38	3.80	\$ 328.24			
Smith, Doug VP, Finance Admin.	\$91.85	6.20	\$ 569.47			
Guevara, Stephanie Dean, Business/Tech	\$58.13	3.50	\$ 203.46			
Green, Dolly Manager of Diversity Programs	\$54.24	0.30	\$ 16.27			
Lee, Lawrence Assistant VP, IT	\$81.28	2.00	\$ 162.56			
Lynn, Morgan VP, EP&S	\$87.79	2.00	\$ 175.58			
Scott, Sandra Director, Economic Development	\$76.96	1.00	\$ 76.96			
Sklarew, Jackie Assistant Dean, Business/Tech	\$71.29	2.00	\$ 142.58			
Wollesen, Mary Program Mgr, SBDC & Economic Dev	\$61.50	1.00	\$ 61.50			
Carney Badley Spellman Attorneys	\$135.00	49.50				\$ 6,682.50
Johnson Schachter & Lewis Attorneys	\$135.00	32.00				\$ 4,320.00
Reader, Vicki Business Services Supervisor	\$52.16	1.80	\$ 93.89			
McClymonds, Judy Administrative Assistant	\$44.40	1.50	\$ 66.60			
Community College League Collective Bargaining Database	\$100.00	40.00				\$ 4,000.00
Center for Collaborative Soli Consultants	\$100.00	48.25				\$ 4,825.00
Center for Collaborative Sol Consultant Costs	\$1.00	2652.10				\$ 2,652.10
Jacobson, Betts & Company Management Consultants	\$112.00	479.00				\$ 53,648.00
Jacobson, Betts & Company Management Consultant Costs	\$100.00	74.20				\$ 7,420.10
Bukey, John Attorney	\$1.00	90.00				\$ 90.00
<b>At-Table Negotiations: Classified</b>						
Cunningham, Ray Assistant Director, Plant Operations	\$52.64	3.00	\$ 157.92			
Leland, Jean Personnel Assistant	\$47.95	79.60	\$ 3,816.82			
Martinez, Ron Director, Human Resources	\$86.38	78.10	\$ 6,746.28			
Smith, Doug VP, Finance Admin.	\$91.85	76.60	\$ 7,035.71			
<b>At-Table Negotiations: Certificated</b>						
Leland, Jean Personnel Assistant	\$47.95	42.50	\$ 2,037.88			
Martinez, Ron Director, Human Resources	\$86.38	41.80	\$ 3,610.68			
Smith, Doug VP, Finance Admin.	\$91.85	39.00	\$ 3,582.15			
McKnight, Diane Associate Dean, Liberal Arts	\$67.55	33.60	\$ 2,269.68			
<b>Preparation for Negotiations: Certificated</b>						
Leland, Jean Personnel Assistant	\$47.95	28.00	\$ 1,342.60			
Martinez, Ron Director, Human Resources	\$86.38	35.00	\$ 3,023.30			
Smith, Doug VP, Finance Admin.	\$91.85	41.30	\$ 3,793.41			
Albee, Neal Associate Dean, Public Safety	\$76.24	2.00	\$ 152.48			
Guevara, Stephanie Dean, Business/Tech	\$58.13	1.00	\$ 58.13			
Green, Dolly Manager of Diversity Programs	\$54.24	1.00	\$ 54.24			
Ludutsky-Taylor, Tina Executive Dean, WNCC	\$82.39	1.00	\$ 82.39			
Lynn, Morgan VP, EP&S	\$87.79	1.00	\$ 87.79			
Tsuji, Bill Dean, Liberal Arts	\$66.95	0.50	\$ 43.48			
Volek, John Dean, PE Athletics	\$75.94	1.50	\$ 113.91			
McClymonds, Judy Administrative Assistant	\$44.40	3.00	\$ 133.20			

(05) Total  Subtotal  Page 1 of 2 \$ 40,974.17 \$ - \$ - \$ 83,637.70

Revised 09/03



Region  
232

**MANDATED COSTS  
COLLECTIVE BARGAINING  
COMPONENT/ACTIVITY COST DETAIL**

FORM  
CB-2

(01) Claimant: Sierra Joint Community College District  
 (02) Fiscal Year Costs Were Incurred: 2003-2004

(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

<input type="checkbox"/> Determining Bargaining Units and Exclusive Representation	<input type="checkbox"/> Collective Bargaining Agreement Disclosure
<input type="checkbox"/> Election of Unit Representation	<input type="checkbox"/> Contract Administration
<input checked="" type="checkbox"/> Cost of Negotiations	<input type="checkbox"/> Unfair Labor Practice Charges
<input type="checkbox"/> Impasse Proceedings	

(04) Description of Expenses

(a) Employee Names, Job Classifications, Functions Performed,	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	Object Accounts			
			(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel	(g) Contract Services
<b>Preparation for Negotiations: Classified</b>						
Cunningham, Ray Assistant Director, Plant Operations	\$52.64	5.00	\$ 263.20			
Leland, Jean Personnel Assistant	\$47.95	28.60	\$ 1,371.37			
Martinez, Ron Director, Human Resources	\$86.38	53.80	\$ 4,647.24			
Smith, Doug VP, Finance Admin.	\$91.85	37.30	\$ 3,426.01			
McKnight, Diane Associate Dean, Liberal Arts	\$67.55	1.00	\$ 67.55			
Allbee, Neal Associate Dean, Public Safety	\$76.24	1.00	\$ 76.24			
Davies, Mandy Dean, Student Services	\$79.74	10.50	\$ 837.27			
Green, Dolly Manager of Diversity Programs	\$54.24	1.00	\$ 54.24			
Lee, Lawrence Assistant VP, IT	\$81.28	3.00	\$ 243.84			
Lynn, Morgan VP, EP&S	\$87.79	3.50	\$ 307.27			
Schwenk, Lonnie Chief of Police Services	\$46.95	1.00	\$ 46.95			
Volek, John Dean, PE Athletics	\$75.94	1.00	\$ 75.94			
Reader, Vicki Business Services Supervisor	\$52.16	2.00	\$ 104.32			
<b>Negotiation Subjects Committee</b>						
Leland, Jean Personnel Assistant	\$47.95	17.80	\$ 843.92			
Martinez, Ron Director, Human Resources	\$86.38	16.40	\$ 1,416.63			
Smith, Doug VP, Finance Admin.	\$91.85	12.90	\$ 1,184.87			
Green, Dolly Manager of Diversity Programs	\$54.24	5.00	\$ 271.20			
Lee, Lawrence Assistant VP, IT	\$81.28	17.40	\$ 1,414.27			
Drennon, Sue Personnel Assistant	\$56.74	8.60	\$ 487.96			
Wickstrom, Robert Director of Business Services	\$88.79	2.00	\$ 177.58			
Yamamoto, Craig Financial Services Prog	\$52.81	3.50	\$ 184.84			
Lee, Dennis Benefits Consultant	\$100.00	60.00				\$ 6,000.00
White, Margaret Associate Director, Nursing	\$70.35	5.60	\$ 393.96			
<b>"At-table" negotiations with employee representatives</b>						
Leland, Jean Personnel Assistant	47.95	7.00	\$ 335.65			
Martinez, Ron Director, Human Resources	86.38	13.50	\$ 1,166.13			
Smith, Doug VP, Finance Admin.	91.85	7.00	\$ 642.95			
McKnight, Diane Associate Dean, Liberal Arts	67.55	5.00	\$ 337.75			
Bukey, John Attorney	125	276.00				\$ 34,500.00
Bukey, John Attorney	1	1,026.00				\$ 1,026.00

Total  Subtotal  Page 2 of 2 \$ 61,353.31 \$ - \$ - \$ 125,163.70

Program <b>232</b>	<b>MANDATED COSTS</b> <b>COLLECTIVE BARGAINING</b> <b>COMPONENT/ACTIVITY COST DETAIL</b>	FORM CB-2
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(01) Claimant Sierra Joint Community College District	(02) Fiscal Year Costs Were Incurred 2003-2004
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(03) Reimbursable Components: Check only **one** box per form to identify the component being claimed.

<input type="checkbox"/> Determining Bargaining Units and Exclusive Representation	<input type="checkbox"/> Collective Bargaining Agreement Disclosure
<input type="checkbox"/> Election of Unit Representation	<input type="checkbox"/> Contract Administration
<input type="checkbox"/> Cost of Negotiations	<input type="checkbox"/> Unfair Labor Practice Charges
<input checked="" type="checkbox"/> Impasse Proceedings	

(04) Description of Expenses	Object Accounts					
(a) Employee Names, Job Classifications, Functions Performed,	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel	(g) Contract Services
Mediation sessions, publish findings of "factfinding panel"						
Camey Badley Spellman Attorney Costs	\$1.00	788.7				\$ 788.65
Bukey, John Attorney	\$125.00	35.0				\$ 4,375.00
(05) Total <input checked="" type="checkbox"/> Subtotal <input type="checkbox"/>			\$ -	\$ -	\$ -	\$ 5,163.65

**MANDATED COSTS**  
**COLLECTIVE BARGAINING**  
**COMPONENT/ACTIVITY COST DETAIL**

**FORM CB-2**

(01) Claimant: Sierra Joint Community College District  
 (02) Fiscal Year Costs Were Incurred: 2003-2004

(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

<input type="checkbox"/> Determining Bargaining Units and Exclusive Representation	<input type="checkbox"/> Collective Bargaining Agreement Disclosure
<input type="checkbox"/> Election of Unit Representation	<input checked="" type="checkbox"/> Contract Administration
<input type="checkbox"/> Cost of Negotiations	<input type="checkbox"/> Unfair Labor Practice Charges
<input type="checkbox"/> Impasse Proceedings	

(04) Description of Expenses			Object Accounts			
(a)	(b)	(c)	(d)	(e)	(f)	(g)
Employee Names, Job Classifications, Functions Performed,	Hourly Rate or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Travel	Contract Services
<b>Contract administration committees</b>						
Cunningham, Ray	Assistant Director, Plant Operations	\$52.64	3.20	\$ 168.45		
Leland, Jean	Personnel Assistant	\$47.95	3.50	\$ 167.83		
Marinez, Ron	Director, Human Resources	\$86.38	10.60	\$ 915.63		
Smith, Doug	VP, Finance Admin.	\$91.85	7.20	\$ 661.32		
McKnight, Diane	Associate Dean, Liberal Arts	\$67.55	10.50	\$ 709.28		
Albee, Neal	Associate Dean, Public Safety	\$76.24	11.00	\$ 838.64		
Brazil, Donna	NCC Supervisor/Admin Support	\$46.31	0.80	\$ 37.05		
Davies, Mandy	Dean, Student Services	\$79.74	10.60	\$ 845.24		
DeCourten, Frank	Dean, Tahoe/Truckee	\$75.03	10.10	\$ 757.80		
Dollesin, Ninette	Project Manager, EP&S	\$54.68	4.30	\$ 235.12		
Epling-Davis, Carla	Director	\$72.29	8.20	\$ 592.78		
Guevara, Stephanie	Dean, Business/Tech	\$58.13	7.10	\$ 412.72		
Green, Dolly	Manager of Diversity Programs	\$54.24	0.90	\$ 48.82		
Haley, Brian	Dean, Learning Resource Center	\$72.57	10.20	\$ 740.21		
Jackson, Darlene	Associate Dean, Child Development Ce	\$67.95	11.10	\$ 754.25		
Kalina, Michelle	Associate Dean, Science and Math	\$70.85	1.80	\$ 127.53		
Kleinbach, Mary	Executive Secretary, EP&S	\$46.44	10.20	\$ 473.69		
Lee, Lawrence	Assistant VP, IT	\$81.28	0.50	\$ 40.64		
Ludutsky-Taylor, Tina	Executive Dean, WNCC	\$82.39	7.50	\$ 617.93		
Lynn, Morgan	VP, EP&S	\$87.79	10.40	\$ 913.02		
Mackey, Jennifer	Assistant Program Mgr, Community Ed	\$36.98	0.80	\$ 29.58		
Nunnally, Delecia	Associate Dean, Student Services	\$68.71	6.50	\$ 446.62		
Roberts, Millie	Executive Secretary	\$49.54	1.00	\$ 49.54		
Schneider, Greg	Purchasing Supervisor	\$39.21	0.80	\$ 31.37		
Schwenk, Lonnie	Chief of Police Services	\$46.95	0.30	\$ 14.09		
Scott, Sandra	Director, Economic Development	\$76.96	8.90	\$ 684.94		
Sklarew, Jackie	Assistant Dean, Business/Tech	\$71.29	4.70	\$ 335.06		
Snyder, Scott	Tech Support Services Manager	\$57.56	0.80	\$ 46.05		
Thiers, Laurie	Project Manager, EP&S	\$43.54	3.50	\$ 152.39		
Tsuji, Bill	Dean, Liberal Arts	\$86.95	11.50	\$ 999.93		
Volek, John	Dean, PE Athletics	\$75.94	10.70	\$ 812.56		
Walters-Dunlap, Karen	Dean, Science and Math	\$73.26	11.00	\$ 805.86		
Wilson, Woodrow	Director, Planning and Research	\$78.11	1.50	\$ 117.17		
Wollesen, Mary	Program Mgr, SBDC & Economic Dev	\$61.50	0.80	\$ 49.20		
White, Margaret	Associate Director, Nursing	\$70.35	8.00	\$ 562.80		
<b>CCD Tenure disputes</b>						
Martinez, Ron	Director, Human Resources	\$86.38	2.00	\$ 172.76		
Albee, Neal	Associate Dean, Public Safety	\$76.24	2.00	\$ 152.48		
Ludutsky-Taylor, Tina	Executive Dean, WNCC	\$82.39	2.00	\$ 164.78		
Lynn, Morgan	VP, EP&S	\$87.79	2.00	\$ 175.58		
Johnson Schachter & Lewis Attorneys		\$135.00	2.00			\$ 270.00
<b>Contract Interpretation</b>						
Leland, Jean	Personnel Assistant	\$47.95	2.00	\$ 95.90		
Martinez, Ron	Director, Human Resources	\$86.38	5.20	\$ 449.18		

(05) Total  Subtotal  Page 1 of 2 \$ 16,405.75 \$ - \$ - \$ 270.00

Revised 09/03

**MANDATED COSTS**  
**COLLECTIVE BARGAINING**  
**COMPONENT/ACTIVITY COST DETAIL**

**FORM CB-2**

(01) Claimant: Sierra Joint Community College District  
 (02) Fiscal Year Costs Were Incurred: 2003-2004

(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

<input type="checkbox"/> Determining Bargaining Units and Exclusive Representation	<input type="checkbox"/> Collective Bargaining Agreement Disclosure
<input type="checkbox"/> Election of Unit Representation	<input checked="" type="checkbox"/> Contract Administration
<input type="checkbox"/> Cost of Negotiations	<input type="checkbox"/> Unfair Labor Practice Charges
<input type="checkbox"/> Impasse Proceedings	

(04) Description of Expenses			Object Accounts			
(a)	(b)	(c)	(d)	(e)	(f)	(g)
Employee Names, Job Classifications, Functions Performed,	Hourly Rate or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Travel	Contract Services
Smith, Doug VP, Finance Admin.	\$91.85	0.20	\$ 18.37			
Johnson Schachter & Lewis Attorneys	\$135.00	32.00				\$ 4,320.00
Reader, Vicki Business Services Supervisor	\$52.16	0.50	\$ 26.08			
Nicolay Consulting Group Pension Consultants & Actuaries	\$100.00	86.00				\$ 8,600.00
<b>Grievance Arbitration</b>						
Martinez, Ron Director, Human Resources	\$86.38	0.10	\$ 8.64			
Johnson Schachter & Lewis Attorneys	\$135.00	0.10				\$ 13.50
<b>Contract Administration</b>						
Roberts, Millie Executive Secretary	\$49.54	12.00	\$ 594.48			
Johnson Schachter & Lewis Attorneys	\$1.00	42.02				\$ 42.02
<b>Grievances</b>						
Martinez, Ron Director, Human Resources	86.38	14.80	\$ 1,278.42			
Green, Dolly Manager of Diversity Programs	54.24	1.50	\$ 81.36			
Sklarew, Jackie Assistant Dean, Business/Tech	71.29	1.00	\$ 71.29			
Volek, John Dean, PE Athletics	75.94	6.50	\$ 493.61			
Johnson Schachter & Lewis Attorneys	135	42.50				\$ 5,737.50
McClymonds, Judy Administrative Assistant	44.4	0.30	\$ 13.32			

3) Total  Subtotal  Page 2 of 2 \$ 18,991.32 \$ - \$ - \$ 18,983.02

revised 09/03

**MANDATED COSTS**  
**COLLECTIVE BARGAINING**  
**COMPONENT/ACTIVITY COST DETAIL**

**FORM CB-2**

(01) Claimant: Sierra Joint Community College District  
 (02) Fiscal Year Costs Were Incurred: 2003-2004

(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

<input type="checkbox"/> Determining Bargaining Units and Exclusive Representation	<input type="checkbox"/> Collective Bargaining Agreement Disclosure
<input type="checkbox"/> Election of Unit Representation	<input type="checkbox"/> Contract Administration
<input type="checkbox"/> Cost of Negotiations	<input checked="" type="checkbox"/> Unfair Labor Practice Charges
<input type="checkbox"/> Impasse Proceedings	

(04) Description of Expenses			Object Accounts			
(a) Employee Names, Job Classifications, Functions Performed,	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel	(g) Contract Services
Preparing for PERB actions						
Leiland, Jean Personnel Assistant	\$47.95	0.20	\$ 9.59			
Martinez, Ron Director, Human Resources	\$86.38	2.60	\$ 224.59			
Green, Dolly Manager of Diversity Programs	\$54.24	0.10	\$ 5.42			
Volek, John Dean, PE Athletics	\$75.94	2.00	\$ 151.88			
Johnson Schachter & Lewis Attorneys	\$135.00	22.10				\$ 2,983.50
Johnson Schachter & Lewi Attorneys	\$1.00	65.87				\$ 65.87
Johnson Schachter & Lewis Attorneys	\$65.00	19.90				\$ 1,293.50
PERB administrative hearings						
Martinez, Ron Director, Human Resources	\$86.38	3.00	\$ 259.14			

(05) Total  Subtotal  Page 1 of 1 \$ 650.62 \$ - \$ - \$ 4,342.87

Revised 09/03

Sort by Name

Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
7/15/2003	1.50	Albee, Neal	Associate Dean, Public Safety	\$76.24	\$114.36	Preparation for Negotiations: Certificated	Cost of Negotiations
9/18/2003	0.50	Albee, Neal	Associate Dean, Public Safety	\$76.24	\$38.12	Preparation for Negotiations: Certificated	Cost of Negotiations
10/9/2003	1.00	Albee, Neal	Associate Dean, Public Safety	\$76.24	\$76.24	Preparation for Negotiations: Classified	Cost of Negotiations
1/1/2004	11.00	Albee, Neal	Associate Dean, Public Safety	\$76.24	\$838.64	Contract administration committees	Contract Administration
1/1/2004	2.00	Albee, Neal	Associate Dean, Public Safety	\$76.24	\$152.48	CCD Tenure disputes	Contract Administration
1/1/2004	16.00	Albee, Neal Total			\$1,219.84		
1/1/2004	0.80	Brazil, Donna	NCC Supervisor/Admin Support	\$46.31	\$37.05	Contract administration committees	Contract Administration
1/1/2004	0.80	Brazil, Donna Total			\$37.05		
Bukey 1	90.00	Bukey, John	Attorney	\$1.00	\$90.00	Preparing for negotiations	Cost of Negotiations
Bukey 1	1026.00	Bukey, John	Attorney	\$1.00	\$1,026.00	"At-table" negotiations with employee representatives	Cost of Negotiations
Bukey 1	1116.00	Bukey, John Total			\$1,116.00		
Bukey 1	35.00	Bukey, John	Attorney	\$125.00	\$4,375.00	Mediation sessions, publish findings of "factfinding panel"	Impasse Proceedings
Bukey 1	276.00	Bukey, John	Attorney	\$125.00	\$34,500.00	"At-table" negotiations with employee representatives	Cost of Negotiations
1/1/2004	311.00	Bukey, John Total			\$38,875.00		
1/1/2004	788.65	Carney Badley Spellman	Attorney Costs	\$1.00	\$788.65	Mediation sessions, publish findings of "factfinding panel"	Impasse Proceedings
1/1/2004	788.65	Carney Badley Spellman Total			\$788.65		
1/1/2004	49.50	Carney Badley Spellman	Attorneys	\$135.00	\$6,682.50	Preparing for negotiations	Cost of Negotiations
4/26/2004	49.50	Carney Badley Spellman Total			\$6,682.50		
3/26/2004	2652.10	Center for Collaborative Solutions	Consultant Costs	\$1.00	\$2,652.10	Preparing for negotiations	Cost of Negotiations
3/26/2004	2652.10	Center for Collaborative Solutions Total			\$2,652.10		
10/27/2003	48.25	Center for Collaborative Solutions	Consultants	\$100.00	\$4,825.00	Preparing for negotiations	Cost of Negotiations
10/27/2003	48.25	Center for Collaborative Solutions Total			\$4,825.00		
7/14/2003	40.00	Community College League of CA	Collective Bargaining Database	\$100.00	\$4,000.00	Preparing for negotiations	Cost of Negotiations
7/14/2003	40.00	Community College League of CA Total			\$4,000.00		
11/3/2003	1.00	Cunningham, Ray	Assistant Director, Plant Operations	\$52.64	\$52.64	Preparation for Negotiations: Classified	Cost of Negotiations
1/1/2004	3.00	Cunningham, Ray	Assistant Director, Plant Operations	\$52.64	\$157.92	At-Table Negotiations: Classified	Cost of Negotiations
1/1/2004	3.20	Cunningham, Ray	Assistant Director, Plant Operations	\$52.64	\$168.45	Contract administration committees	Contract Administration
3/3/2004	1.00	Cunningham, Ray	Assistant Director, Plant Operations	\$52.64	\$52.64	Preparation for Negotiations: Classified	Cost of Negotiations
3/29/2004	1.00	Cunningham, Ray	Assistant Director, Plant Operations	\$52.64	\$52.64	Preparation for Negotiations: Classified	Cost of Negotiations
5/17/2004	1.00	Cunningham, Ray	Assistant Director, Plant Operations	\$52.64	\$52.64	Preparation for Negotiations: Classified	Cost of Negotiations
7/29/2003	11.20	Cunningham, Ray Total			\$589.57		
9/16/2003	2.00	Davies, Mandy	Dean, Student Services	\$79.74	\$159.48	Preparation for Negotiations: Classified	Cost of Negotiations
11/3/2003	1.50	Davies, Mandy	Dean, Student Services	\$79.74	\$119.61	Preparation for Negotiations: Classified	Cost of Negotiations
11/25/2003	1.00	Davies, Mandy	Dean, Student Services	\$79.74	\$79.74	Preparation for Negotiations: Classified	Cost of Negotiations
1/1/2004	1.00	Davies, Mandy	Dean, Student Services	\$79.74	\$79.74	Preparation for Negotiations: Classified	Cost of Negotiations
2/2/2004	10.60	Davies, Mandy	Dean, Student Services	\$79.74	\$845.24	Contract administration committees	Contract Administration
3/22/2004	1.00	Davies, Mandy	Dean, Student Services	\$79.74	\$79.74	Preparation for Negotiations: Classified	Cost of Negotiations
4/21/2004	1.00	Davies, Mandy	Dean, Student Services	\$79.74	\$79.74	Preparation for Negotiations: Classified	Cost of Negotiations

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Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
4/27/2004	1.00	Davies, Mandy	Dean, Student Services	\$79.74	\$79.74	Preparation for Negotiations: Classified	Cost of Negotiations
5/17/2004	1.00	Davies, Mandy	Dean, Student Services	\$79.74	\$79.74	Preparation for Negotiations: Classified	Cost of Negotiations
	21.10	Davies, Mandy Total			\$1,682.51		
1/1/2004	10.10	DeCourten, Frank	Dean, Tahoe/Truckee	\$75.03	\$757.80	Contract administration committees	Contract Administration
1/1/2004	10.10	DeCourten, Frank Total			\$757.80		
1/1/2004	4.30	Dollesin, Ninette	Project Manager, EP&S	\$54.68	\$235.12	Contract administration committees	Contract Administration
1/1/2004	4.30	Dollesin, Ninette Total			\$235.12		
1/1/2004	8.60	Drennon, Sue	Personnel Assistant	\$56.74	\$487.96	Negotiation Subjects Committee	Cost of Negotiations
1/1/2004	8.60	Drennon, Sue Total			\$487.96		
1/1/2004	8.20	Epting-Davis, Carla	Director	\$72.29	\$592.78	Contract administration committees	Contract Administration
1/1/2004	8.20	Epting-Davis, Carla Total			\$592.78		
7/1/2003	1.00	Green, Dolly	Manager of Diversity Programs	\$54.24	\$54.24	Preparation for Negotiations: Certificated	Cost of Negotiations
10/7/2003	0.50	Green, Dolly	Manager of Diversity Programs	\$54.24	\$27.12	Grievances	Contract Administration
11/5/2003	1.00	Green, Dolly	Manager of Diversity Programs	\$54.24	\$54.24	Grievances	Contract Administration
1/1/2004	0.90	Green, Dolly	Manager of Diversity Programs	\$54.24	\$48.82	Contract administration committees	Contract Administration
1/1/2004	5.00	Green, Dolly	Manager of Diversity Programs	\$54.24	\$271.20	Negotiation Subjects Committee	Contract Administration
1/1/2004	0.10	Green, Dolly	Manager of Diversity Programs	\$54.24	\$5.42	Preparing for PERB actions	Cost of Negotiations
1/1/2004	0.30	Green, Dolly	Manager of Diversity Programs	\$54.24	\$16.27	Preparing for negotiations	Unfair Labor Practice Charges
4/17/2004	1.00	Green, Dolly	Manager of Diversity Programs	\$54.24	\$54.24	Preparation for Negotiations: Classified	Cost of Negotiations
4/17/2004	9.80	Green, Dolly Total			\$531.55		
1/1/2004	7.10	Guevara, Stephanie	Dean, Business/Tech	\$58.13	\$412.72	Contract administration committees	Contract Administration
2/27/2004	1.00	Guevara, Stephanie	Dean, Business/Tech	\$58.13	\$58.13	Preparing for negotiations	Cost of Negotiations
3/8/2004	1.00	Guevara, Stephanie	Dean, Business/Tech	\$58.13	\$58.13	Preparing for negotiations	Cost of Negotiations
3/29/2004	1.50	Guevara, Stephanie	Dean, Business/Tech	\$58.13	\$87.20	Preparing for negotiations	Cost of Negotiations
10/20/2004	1.00	Guevara, Stephanie	Dean, Business/Tech	\$58.13	\$58.13	Preparation for Negotiations: Certificated	Cost of Negotiations
10/20/2004	11.60	Guevara, Stephanie Total			\$674.31		
1/1/2004	10.20	Haley, Brian	Dean, Learning Resource Center	\$72.57	\$740.21	Contract administration committees	Contract Administration
1/1/2004	10.20	Haley, Brian Total			\$740.21		
1/1/2004	11.10	Jackson, Darlene	Associate Dean, Child Development Center	\$67.95	\$754.25	Contract administration committees	Contract Administration
1/1/2004	11.10	Jackson, Darlene Total			\$754.25		
1/1/2004	74.20	Jacobson, Betts & Company	Management Consultant Costs	\$100.00	\$7,420.10	Preparing for negotiations	Cost of Negotiations
1/1/2004	74.20	Jacobson, Betts & Company Total			\$7,420.10		
1/1/2004	479.00	Jacobson, Betts & Company	Management Consultants	\$112.00	\$53,648.00	Preparing for negotiations	Cost of Negotiations
1/1/2004	479.00	Jacobson, Betts & Company Total			\$53,648.00		
1/1/2004	42.02	Johnson Schachter & Lewis	Attorneys	\$1.00	\$42.02	Contract Administration	Contract Administration
1/1/2004	65.87	Johnson Schachter & Lewis	Attorneys	\$1.00	\$65.87	Preparing for PERB actions	Unfair Labor Practice Charges
1/1/2004	107.89	Johnson Schachter & Lewis Total			\$107.89		
1/1/2004	19.90	Johnson Schachter & Lewis	Attorneys	\$65.00	\$1,293.50	Preparing for PERB actions	Unfair Labor Practice Charges
1/1/2004	19.90	Johnson Schachter & Lewis Total			\$1,293.50		
1/1/2004	32.00	Johnson Schachter & Lewis	Attorneys	\$135.00	\$4,320.00	Preparing for negotiations	Cost of Negotiations

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Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
1/1/2004	32.00	Johnson Schachter & Lewis	Attorneys	\$135.00	\$4,320.00	Contract Interpretation	Contract Administration
1/1/2004	42.50	Johnson Schachter & Lewis	Attorneys	\$135.00	\$5,737.50	Grievances	Contract Administration
1/1/2004	2.00	Johnson Schachter & Lewis	Attorneys	\$135.00	\$270.00	CCD Tenure disputes	Contract Administration
1/1/2004	0.10	Johnson Schachter & Lewis	Attorneys	\$135.00	\$13.50	Grievance Arbitration	Contract Administration
1/1/2004	22.10	Johnson Schachter & Lewis	Attorneys	\$135.00	\$2,983.50	Preparing for PERB actions	Unfair Labor Practice Charges
	130.70	Johnson Schachter & Lewis Total			\$17,644.50		
1/1/2004	1.80	Kalina, Michelle	Associate Dean, Science and Math	\$70.85	\$127.53	Contract administration committees	Contract Administration
1/1/2004	1.80	Kalina, Michelle Total			\$127.53		
1/1/2004	10.20	Kleinbach, Mary	Executive Secretary, EP&S	\$46.44	\$473.69	Contract administration committees	Contract Administration
1/1/2004	10.20	Kleinbach, Mary Total			\$473.69		
3/25/2004	30.00	Lee, Dennis	Benefits Consultant	\$100.00	\$3,000.00	Negotiation Subjects Committee	Cost of Negotiations
4/29/2004	30.00	Lee, Dennis	Benefits Consultant	\$100.00	\$3,000.00	Negotiation Subjects Committee	Cost of Negotiations
	60.00	Lee, Dennis Total			\$6,000.00		
8/4/2003	1.00	Lee, Lawrence	Assistant VP, IT	\$81.28	\$81.28	Preparation for Negotiations: Classified	Cost of Negotiations
8/7/2003	1.00	Lee, Lawrence	Assistant VP, IT	\$81.28	\$81.28	Preparation for Negotiations: Classified	Cost of Negotiations
9/25/2003	1.00	Lee, Lawrence	Assistant VP, IT	\$81.28	\$81.28	Preparation for Negotiations: Classified	Cost of Negotiations
1/1/2004	0.50	Lee, Lawrence	Assistant VP, IT	\$81.28	\$40.64	Contract administration committees	Contract Administration
1/1/2004	17.40	Lee, Lawrence	Assistant VP, IT	\$81.28	\$1,414.27	Negotiation Subjects Committee	Cost of Negotiations
7/10/2004	2.00	Lee, Lawrence	Assistant VP, IT	\$81.28	\$162.56	Preparing for negotiations	Cost of Negotiations
	22.90	Lee, Lawrence Total			\$1,861.31		
8/4/2003	1.00	Leland, Jean	Personnel Assistant	\$47.95	\$47.95	Preparation for Negotiations: Classified	Cost of Negotiations
8/20/2003	1.50	Leland, Jean	Personnel Assistant	\$47.95	\$71.93	Preparation for Negotiations: Classified	Cost of Negotiations
9/2/2003	2.00	Leland, Jean	Personnel Assistant	\$47.95	\$95.90	Preparation for Negotiations: Certified	Cost of Negotiations
9/3/2003	3.00	Leland, Jean	Personnel Assistant	\$47.95	\$143.85	Preparation for Negotiations: Classified	Cost of Negotiations
9/5/2003	1.80	Leland, Jean	Personnel Assistant	\$47.95	\$86.31	Preparing for negotiations	Cost of Negotiations
9/10/2003	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
9/17/2003	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
9/22/2003	2.50	Leland, Jean	Personnel Assistant	\$47.95	\$119.88	Preparation for Negotiations: Certified	Cost of Negotiations
9/25/2003	3.00	Leland, Jean	Personnel Assistant	\$47.95	\$143.85	Preparation for Negotiations: Certified	Cost of Negotiations
11/3/2003	1.00	Leland, Jean	Personnel Assistant	\$47.95	\$47.95	Preparation for Negotiations: Classified	Cost of Negotiations
12/10/2003	2.00	Leland, Jean	Personnel Assistant	\$47.95	\$95.90	Contract Interpretation	Contract Administration
1/1/2004	79.60	Leland, Jean	Personnel Assistant	\$47.95	\$3,816.82	At-Table Negotiations: Classified	Cost of Negotiations
1/1/2004	42.50	Leland, Jean	Personnel Assistant	\$47.95	\$2,037.88	At-Table Negotiations: Certified	Cost of Negotiations
1/1/2004	11.50	Leland, Jean	Personnel Assistant	\$47.95	\$551.43	Preparation for Negotiations: Certified	Cost of Negotiations
1/1/2004	8.30	Leland, Jean	Personnel Assistant	\$47.95	\$397.99	Preparation for Negotiations: Classified	Cost of Negotiations
1/1/2004	11.00	Leland, Jean	Personnel Assistant	\$47.95	\$527.45	Preparing for negotiations	Cost of Negotiations
1/1/2004	3.50	Leland, Jean	Personnel Assistant	\$47.95	\$167.83	Contract administration committees	Contract Administration
1/1/2004	17.60	Leland, Jean	Personnel Assistant	\$47.95	\$843.92	Negotiation Subjects Committee	Cost of Negotiations
1/1/2004	4.70	Leland, Jean	Personnel Assistant	\$47.95	\$225.37	Preparing for negotiations	Cost of Negotiations
1/1/2004	0.20	Leland, Jean	Personnel Assistant	\$47.95	\$9.59	Preparing for PERB actions	Unfair Labor Practice Charges



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Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
1/12/2004	2.00	Leland, Jean	Personnel Assistant	\$47.95	\$95.90	Preparation for Negotiations: Classified	Cost of Negotiations
1/28/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
1/29/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
2/4/2004	1.00	Leland, Jean	Personnel Assistant	\$47.95	\$47.95	Preparation for Negotiations: Classified	Cost of Negotiations
2/4/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
2/5/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
2/5/2004	2.00	Leland, Jean	Personnel Assistant	\$47.95	\$95.90	"At-table" negotiations with employee representatives	Cost of Negotiations
2/5/2004	2.00	Leland, Jean	Personnel Assistant	\$47.95	\$95.90	"At-table" negotiations with employee representatives	Cost of Negotiations
2/11/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
2/12/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
2/17/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
2/25/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
2/26/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
2/27/2004	1.00	Leland, Jean	Personnel Assistant	\$47.95	\$47.95	Preparing for negotiations	Cost of Negotiations
3/3/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
3/4/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
3/5/2004	0.80	Leland, Jean	Personnel Assistant	\$47.95	\$38.36	Preparation for Negotiations: Classified	Cost of Negotiations
4/8/2004	1.00	Leland, Jean	Personnel Assistant	\$47.95	\$47.95	Preparing for negotiations	Cost of Negotiations
4/10/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
4/11/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
3/17/2004	1.00	Leland, Jean	Personnel Assistant	\$47.95	\$47.95	Preparation for Negotiations: Classified	Cost of Negotiations
3/17/2004	1.00	Leland, Jean	Personnel Assistant	\$47.95	\$47.95	Preparation for Negotiations: Classified	Cost of Negotiations
3/18/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
3/24/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
4/15/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
4/22/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
4/27/2004	1.00	Leland, Jean	Personnel Assistant	\$47.95	\$47.95	Preparation for Negotiations: Classified	Cost of Negotiations
4/29/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
5/6/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
5/12/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
5/13/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
5/20/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
5/21/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
5/26/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
5/27/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
6/16/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
6/17/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
6/23/2004	0.50	Leland, Jean	Personnel Assistant	\$47.95	\$23.98	Preparation for Negotiations: Classified	Cost of Negotiations
6/30/2004	3.00	Leland, Jean	Personnel Assistant	\$47.95	\$143.85	"At-table" negotiations with employee representatives	Cost of Negotiations
10/20/2004	1.00	Leland, Jean	Personnel Assistant	\$47.95	\$47.95	Preparation for Negotiations: Classified	Cost of Negotiations

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Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
	228.50	Leland, Jean Total			\$10,956.76		
1/1/2004	7.50	Ludutsky-Taylor, Tina	Executive Dean, WNCC	\$82.39	\$617.93	Contract administration committees	Contract Administration
1/1/2004	2.00	Ludutsky-Taylor, Tina	Executive Dean, WNCC	\$82.39	\$164.78	CCD Tenure disputes	Contract Administration
9/30/2004	1.00	Ludutsky-Taylor, Tina	Executive Dean, WNCC	\$82.39	\$82.39	Preparation for Negotiations: Certificated	Cost of Negotiations
	10.50	Ludutsky-Taylor, Tina Total			\$865.10		
9/16/2003	1.50	Lynn, Morgan	VP, EP&S	\$87.79	\$131.69	Preparation for Negotiations: Classified	Cost of Negotiations
10/9/2003	1.00	Lynn, Morgan	VP, EP&S	\$87.79	\$87.79	Preparation for Negotiations: Classified	Cost of Negotiations
1/1/2004	10.40	Lynn, Morgan	VP, EP&S	\$87.79	\$913.02	Contract administration committees	Contract Administration
1/1/2004	2.00	Lynn, Morgan	VP, EP&S	\$87.79	\$175.58	CCD Tenure disputes	Contract Administration
4/30/2004	2.00	Lynn, Morgan	VP, EP&S	\$87.79	\$175.58	Preparing for negotiations	Cost of Negotiations
9/30/2004	1.00	Lynn, Morgan	VP, EP&S	\$87.79	\$87.79	Preparation for Negotiations: Certificated	Cost of Negotiations
10/1/2004	1.00	Lynn, Morgan	VP, EP&S	\$87.79	\$87.79	Preparation for Negotiations: Classified	Cost of Negotiations
	18.90	Lynn, Morgan Total			\$1,659.24		
1/1/2004	0.80	Mackey, Jennifer	Assistant Program Mgr, Community Ed	\$36.98	\$29.58	Contract administration committees	Contract Administration
	0.80	Mackey, Jennifer Total			\$29.58		
9/5/2003	1.80	Martinez, Ron	Director, Human Resources	\$86.38	\$155.48	Preparing for negotiations	Cost of Negotiations
10/13/2003	1.00	Martinez, Ron	Director, Human Resources	\$86.38	\$86.38	Preparation for Negotiations: Certificated	Cost of Negotiations
11/19/2003	0.30	Martinez, Ron	Director, Human Resources	\$86.38	\$25.91	Preparation for Negotiations: Classified	Cost of Negotiations
1/1/2004	78.10	Martinez, Ron	Director, Human Resources	\$86.38	\$6,746.28	At-Table Negotiations: Classified	Cost of Negotiations
1/1/2004	41.80	Martinez, Ron	Director, Human Resources	\$86.38	\$3,610.68	At-Table Negotiations: Certificated	Cost of Negotiations
1/1/2004	10.60	Martinez, Ron	Director, Human Resources	\$86.38	\$915.63	Contract administration committees	Contract Administration
1/1/2004	16.40	Martinez, Ron	Director, Human Resources	\$86.38	\$1,416.63	Negotiation Subjects Committee	Cost of Negotiations
1/1/2004	34.00	Martinez, Ron	Director, Human Resources	\$86.38	\$2,936.92	Preparation for Negotiations: Certificated	Cost of Negotiations
1/1/2004	51.50	Martinez, Ron	Director, Human Resources	\$86.38	\$4,448.57	Preparation for Negotiations: Classified	Cost of Negotiations
1/1/2004	8.50	Martinez, Ron	Director, Human Resources	\$86.38	\$734.23	"At-table" negotiations with employee representatives	Cost of Negotiations
1/1/2004	4.00	Martinez, Ron	Director, Human Resources	\$86.38	\$345.52	Contract Interpretation	Contract Administration
1/1/2004	12.50	Martinez, Ron	Director, Human Resources	\$86.38	\$1,079.75	Grievances	Contract Administration
1/1/2004	3.00	Martinez, Ron	Director, Human Resources	\$86.38	\$259.14	PERB administrative hearings	Contract Administration
1/1/2004	1.20	Martinez, Ron	Director, Human Resources	\$86.38	\$103.66	Contract Interpretation	Unfair Labor Practice Charges
1/1/2004	2.30	Martinez, Ron	Director, Human Resources	\$86.38	\$198.67	Grievances	Contract Administration
1/1/2004	2.00	Martinez, Ron	Director, Human Resources	\$86.38	\$172.76	CCD Tenure disputes	Contract Administration
1/1/2004	0.10	Martinez, Ron	Director, Human Resources	\$86.38	\$8.64	Grievance Arbitration	Contract Administration
1/1/2004	2.60	Martinez, Ron	Director, Human Resources	\$86.38	\$224.59	Preparing for PERB actions	Contract Administration
1/12/2004	2.00	Martinez, Ron	Director, Human Resources	\$86.38	\$172.76	Preparation for Negotiations: Classified	Unfair Labor Practice Charges
2/5/2004	2.00	Martinez, Ron	Director, Human Resources	\$86.38	\$172.76	"At-table" negotiations with employee representatives	Cost of Negotiations
3/10/2004	2.00	Martinez, Ron	Director, Human Resources	\$86.38	\$172.76	Preparing for negotiations	Cost of Negotiations
6/30/2004	3.00	Martinez, Ron	Director, Human Resources	\$86.38	\$259.14	"At-table" negotiations with employee representatives	Cost of Negotiations
	280.70	Martinez, Ron Total			\$24,246.86		
7/15/2003	1.50	McClymonds, Judy	Administrative Assistant	\$44.40	\$66.60	Preparation for Negotiations: Certificated	Cost of Negotiations
9/18/2003	0.50	McClymonds, Judy	Administrative Assistant	\$44.40	\$22.20	Preparation for Negotiations: Certificated	Cost of Negotiations

Sort by Name

Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
1/1/2004	0.30	McClymonds, Judy	Administrative Assistant	\$44.40	\$13.32	Grievances	Contract Administration
3/29/2004	1.50	McClymonds, Judy	Administrative Assistant	\$44.40	\$66.60	Preparing for negotiations	Cost of Negotiations
10/20/2004	1.00	McClymonds, Judy	Administrative Assistant	\$44.40	\$44.40	Preparation for Negotiations: Certified	Cost of Negotiations
	4.80	<b>McClymonds, Judy Total</b>			\$213.12		
9/24/2003	1.00	McKnight, Diane	Associate Dean, Liberal Arts	\$67.55	\$67.55	Preparation for Negotiations: Classified	Cost of Negotiations
1/1/2004	33.60	McKnight, Diane	Associate Dean, Liberal Arts	\$67.55	\$2,269.88	At-Table Negotiations: Certified	Cost of Negotiations
1/1/2004	10.50	McKnight, Diane	Associate Dean, Liberal Arts	\$67.55	\$709.28	Contract administration committees	Contract Administration
2/5/2004	2.00	McKnight, Diane	Associate Dean, Liberal Arts	\$67.55	\$135.10	"At-table" negotiations with employee representatives	Cost of Negotiations
6/30/2004	3.00	McKnight, Diane	Associate Dean, Liberal Arts	\$67.55	\$202.65	"At-table" negotiations with employee representatives	Cost of Negotiations
	50.10	<b>McKnight, Diane Total</b>			\$3,384.26		
10/22/2003	38.00	Nicolay Consulting Group	Pension Consultants & Actuaries	\$100.00	\$3,800.00	Contract Interpretation	Contract Administration
11/11/2003	48.00	Nicolay Consulting Group	Pension Consultants & Actuaries	\$100.00	\$4,800.00	Contract Interpretation	Contract Administration
	86.00	<b>Nicolay Consulting Group Total</b>			\$8,600.00		
1/1/2004	6.50	Nunnally, Delecia	Associate Dean, Student Services	\$68.71	\$446.62	Contract administration committees	Contract Administration
	6.50	<b>Nunnally, Delecia Total</b>			\$446.62		
8/4/2003	1.00	Reader, Vicki	Business Services Supervisor	\$52.16	\$52.16	Preparation for Negotiations: Classified	Cost of Negotiations
9/5/2003	1.80	Reader, Vicki	Business Services Supervisor	\$52.16	\$93.89	Preparing for negotiations	Cost of Negotiations
11/3/2003	1.00	Reader, Vicki	Business Services Supervisor	\$52.16	\$52.16	Preparation for Negotiations: Classified	Cost of Negotiations
9/1/2003	0.50	Reader, Vicki	Business Services Supervisor	\$52.16	\$26.08	Contract Interpretation	Contract Administration
	4.30	<b>Reader, Vicki Total</b>			\$224.29		
9/24/2003	5.80	Roberts, Millie	Executive Secretary	\$49.54	\$287.33	Contract Administration	Contract Administration
12/15/2003	6.20	Roberts, Millie	Executive Secretary	\$49.54	\$307.15	Contract Administration	Contract Administration
1/1/2004	1.00	Roberts, Millie	Executive Secretary	\$49.54	\$49.54	Contract administration committees	Contract Administration
	13.00	<b>Roberts, Millie Total</b>			\$644.02		
1/1/2004	0.80	Schneider, Greg	Purchasing Supervisor	\$39.21	\$31.37	Contract administration committees	Contract Administration
	0.80	<b>Schneider, Greg Total</b>			\$31.37		
11/3/2003	1.00	Schwenk, Lonnie	Chief of Police Services	\$46.95	\$46.95	Preparation for Negotiations: Classified	Cost of Negotiations
1/1/2004	0.30	Schwenk, Lonnie	Chief of Police Services	\$46.95	\$14.09	Contract administration committees	Contract Administration
	1.30	<b>Schwenk, Lonnie Total</b>			\$61.04		
9/30/2003	1.00	Scott, Sandra	Director, Economic Development	\$76.96	\$76.96	Preparing for negotiations	Cost of Negotiations
1/1/2004	8.90	Scott, Sandra	Director, Economic Development	\$76.96	\$684.94	Contract administration committees	Contract Administration
	9.90	<b>Scott, Sandra Total</b>			\$761.90		
11/5/2003	1.00	Sklarew, Jackie	Assistant Dean, Business/Tech	\$71.29	\$71.29	Grievances	Contract Administration
1/1/2004	4.70	Sklarew, Jackie	Assistant Dean, Business/Tech	\$71.29	\$335.06	Contract administration committees	Contract Administration
4/30/2004	2.00	Sklarew, Jackie	Assistant Dean, Business/Tech	\$71.29	\$142.58	Preparing for negotiations	Cost of Negotiations
	7.70	<b>Sklarew, Jackie Total</b>			\$548.93		
7/14/2003	1.00	Smith, Doug	VP, Finance Admin.	\$91.85	\$91.85	Preparation for Negotiations: Classified	Cost of Negotiations
9/3/2003	3.00	Smith, Doug	VP, Finance Admin.	\$91.85	\$275.55	Preparation for Negotiations: Classified	Cost of Negotiations
9/10/2003	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Classified	Cost of Negotiations
9/16/2003	1.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$137.78	Preparation for Negotiations: Classified	Cost of Negotiations

Sort by Name

Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
9/17/2003	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Classified	Cost of Negotiations
9/25/2003	3.00	Smith, Doug	VP, Finance Admin.	\$91.85	\$275.55	Preparation for Negotiations: Certified	Cost of Negotiations
10/22/2003	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Certified	Cost of Negotiations
1/1/2004	76.60	Smith, Doug	VP, Finance Admin.	\$91.85	\$7,035.71	At-Table Negotiations: Classified	Cost of Negotiations
1/1/2004	39.00	Smith, Doug	VP, Finance Admin.	\$91.85	\$3,582.15	At-Table Negotiations: Certified	Cost of Negotiations
1/1/2004	7.20	Smith, Doug	VP, Finance Admin.	\$91.85	\$661.32	Contract administration committees	Contract Administration
1/1/2004	12.90	Smith, Doug	VP, Finance Admin.	\$91.85	\$1,184.87	Negotiation Subjects Committee	Cost of Negotiations
1/1/2004	1.90	Smith, Doug	VP, Finance Admin.	\$91.85	\$174.52	Preparing for negotiations	Cost of Negotiations
1/1/2004	0.20	Smith, Doug	VP, Finance Admin.	\$91.85	\$18.37	Contract Interpretation	Contract Administration
1/1/2004	32.30	Smith, Doug	VP, Finance Admin.	\$91.85	\$2,966.76	Preparation for Negotiations: Certified	Cost of Negotiations
1/1/2004	24.30	Smith, Doug	VP, Finance Admin.	\$91.85	\$2,231.96	Preparation for Negotiations: Classified	Cost of Negotiations
1/1/2004	3.80	Smith, Doug	VP, Finance Admin.	\$91.85	\$349.03	Preparing for negotiations	Cost of Negotiations
2/4/2004	1.00	Smith, Doug	VP, Finance Admin.	\$91.85	\$91.85	Preparation for Negotiations: Classified	Cost of Negotiations
2/4/2004	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Classified	Cost of Negotiations
2/5/2004	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Certified	Cost of Negotiations
2/5/2004	2.00	Smith, Doug	VP, Finance Admin.	\$91.85	\$183.70	"At-table" negotiations with employee representatives	Cost of Negotiations
2/5/2004	2.00	Smith, Doug	VP, Finance Admin.	\$91.85	\$183.70	"At-table" negotiations with employee representatives	Cost of Negotiations
3/1/2004	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Certified	Cost of Negotiations
3/2/2004	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Certified	Cost of Negotiations
3/3/2004	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Certified	Cost of Negotiations
3/10/2004	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Certified	Cost of Negotiations
3/11/2004	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparing for negotiations	Cost of Negotiations
3/16/2004	1.00	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Certified	Cost of Negotiations
3/24/2004	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$91.85	Preparation for Negotiations: Classified	Cost of Negotiations
4/15/2004	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Certified	Cost of Negotiations
4/22/2004	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Certified	Cost of Negotiations
5/6/2004	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Certified	Cost of Negotiations
5/13/2004	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Certified	Cost of Negotiations
5/20/2004	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Certified	Cost of Negotiations
5/27/2004	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Certified	Cost of Negotiations
6/17/2004	1.00	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Certified	Cost of Negotiations
6/17/2004	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Certified	Cost of Negotiations
6/23/2004	0.50	Smith, Doug	VP, Finance Admin.	\$91.85	\$91.85	Preparation for Negotiations: Classified	Cost of Negotiations
6/30/2004	3.00	Smith, Doug	VP, Finance Admin.	\$91.85	\$45.93	Preparation for Negotiations: Certified	Cost of Negotiations
10/1/2004	1.00	Smith, Doug	VP, Finance Admin.	\$91.85	\$275.55	"At-table" negotiations with employee representatives	Cost of Negotiations
	227.70	Smith, Doug Total		\$91.85	\$20,914.37	Preparation for Negotiations: Classified	Cost of Negotiations
1/1/2004	0.80	Snyder, Scott	Tech Support Services Manager	\$57.56	\$46.05	Contract administration committees	Contract Administration
1/1/2004	0.80	Snyder, Scott Total		\$46.05	\$46.05		
1/1/2004	3.50	Thiers, Laurie	Project Manager, EP&S	\$43.54	\$152.39	Contract administration committees	Contract Administration

Sort by Name

Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
	3.50	<b>Thiers, Laurie Total</b>			\$152.39		
9/3/2003	0.50	Tsuji, Bill	Dean, Liberal Arts	\$86.95	\$43.48	Preparation for Negotiations: Certificated	Cost of Negotiations
1/1/2004	11.50	Tsuji, Bill	Dean, Liberal Arts	\$86.95	\$999.93	Contract administration committees	Contract Administration
	12.00	<b>Tsuji, Bill Total</b>			\$1,043.41		
9/10/2003	1.00	Volek, John	Dean, PE Athletics	\$75.94	\$75.94	Preparation for Negotiations: Certificated	Cost of Negotiations
9/17/2003	1.50	Volek, John	Dean, PE Athletics	\$75.94	\$113.91	Grievances	Contract Administration
9/29/2003	1.00	Volek, John	Dean, PE Athletics	\$75.94	\$75.94	Grievances	Contract Administration
12/2/2003	2.00	Volek, John	Dean, PE Athletics	\$75.94	\$151.88	Grievances	Contract Administration
1/1/2004	10.70	Volek, John	Dean, PE Athletics	\$75.94	\$812.56	Contract administration committees	Contract Administration
1/1/2004	1.00	Volek, John	Dean, PE Athletics	\$75.94	\$75.94	Grievances	Contract Administration
1/1/2004	2.00	Volek, John	Dean, PE Athletics	\$75.94	\$151.88	Preparing for PERB actions	Contract Administration
2/17/2004	0.50	Volek, John	Dean, PE Athletics	\$75.94	\$37.97	Preparation for Negotiations: Certificated	Contract Administration
3/17/2004	1.00	Volek, John	Dean, PE Athletics	\$75.94	\$75.94	Grievances	Contract Administration
5/17/2004	1.00	Volek, John	Dean, PE Athletics	\$75.94	\$75.94	Preparation for Negotiations: Classified	Contract Administration
	21.70	<b>Volek, John Total</b>			\$1,647.90		
1/1/2004	11.00	Walters-Dunlap, Karen	Dean, Science and Math	\$73.26	\$805.86	Contract administration committees	Contract Administration
	11.00	<b>Walters-Dunlap, Karen Total</b>			\$805.86		
4/1/2004	8.00	White, Margaret	Associate Director, Nursing	\$70.35	\$562.80	Contract administration committees	Contract Administration
4/1/2004	5.60	White, Margaret	Associate Director, Nursing	\$70.35	\$393.96	Negotiation Subjects Committee	Cost of Negotiations
	13.60	<b>White, Margaret Total</b>			\$956.76		
1/1/2004	2.00	Wickstrom, Robert	Director of Business Services	\$88.79	\$177.58	Negotiation Subjects Committee	Cost of Negotiations
1/1/2004	2.00	<b>Wickstrom, Robert Total</b>			\$177.58		
1/1/2004	1.50	Wilson, Woodrow	Director, Planning and Research	\$78.11	\$117.17	Contract administration committees	Contract Administration
	1.50	<b>Wilson, Woodrow Total</b>			\$117.17		
1/1/2004	0.80	Wollesen, Mary	Program Mgr, SBDC & Economic Dev	\$61.50	\$49.20	Contract administration committees	Contract Administration
9/30/2004	1.00	Wollesen, Mary	Program Mgr, SBDC & Economic Dev	\$61.50	\$61.50	Preparing for negotiations	Cost of Negotiations
	1.80	<b>Wollesen, Mary Total</b>			\$110.70		
1/1/2004	3.50	Yamamoto, Craig	Financial Services Prog	\$52.81	\$184.84	Negotiation Subjects Committee	Cost of Negotiations
	3.50	<b>Yamamoto, Craig Total</b>			\$184.84		
	7057.99	<b>Grand Total</b>			\$234,648.84		

Sierra Joint Community College District  
Collective Bargaining  
FY 2003-2004  
Summary of Reimbursable Legal Services  
John L. Bukey  
Bukey 1

Billing Date	Service Date	Component 3			
		NP	NP Costs	NT	NT Costs
8/31/2003	8/6			4.50	
	8/20	4.50			
	8/27			5.00	
	8/28			4.50	
9/30/2003	9/3			5.00	
	9/4			4.75	
	9/10			5.00	
	9/11			5.00	
	9/17			4.50	
	9/18			5.00	
	9/25			4.50	
10/31/2003	10/2			5.00	
	10/9			5.00	
	10/21	0.75			
	10/23			6.25	
	10/24			5.75	
	10/28			4.50	
	10/30			4.50	
11/30/2003	11/5			5.50	
	11/6			4.00	
	11/19			5.00	
	11/20			4.00	
	11/24			3.50	
12/31/2003	12/1			4.50	
	12/3			4.00	
	12/4			4.50	
	12/15			4.75	
	12/17			4.50	
1/31/2004	1/12	3.75			
	1/14			5.50	
	1/15			4.25	
	1/16			5.25	
2/29/2004	2/5			4.00	
	2/10	1.50			
	2/11			3.75	
	2/25			5.00	
	2/26			4.00	
	8/6				\$18.00
	8/20		\$18.00		
	8/27				\$18.00
	8/28				\$18.00
	9/3				\$18.00
	9/4				\$18.00
	9/10				\$18.00
	9/11				\$18.00
	9/17				\$18.00
	9/25				\$18.00
	10/2				\$18.00
	10/9				\$18.00
	10/23				\$18.00
	10/24				\$18.00
	10/28				\$18.00
	10/30				\$18.00
	11/5				\$18.00
	11/6				\$18.00
	11/19				\$18.00
	11/20				\$18.00
	11/24				\$18.00
	12/1				\$18.00

Sierra Joint Community College District  
Collective Bargaining  
FY 2003-2004  
Summary of Reimbursable Legal Services  
John L. Bukey  
Bukey 1

Billing Date	Service Date	Component 3			
		NP	NP Costs	NT	NT Costs
	12/3				\$18.00
	12/4				\$18.00
	12/15				\$18.00
	12/17				\$18.00
	1/12		\$18.00		
	1/14				\$18.00
	1/15				\$18.00
	1/16				\$18.00
	2/5				\$18.00
	2/11				\$18.00
	2/25				\$18.00
	2/26				\$18.00
3/31/2004	3/3			5.00	
	3/4			3.50	
	3/10			5.00	
	3/11			4.50	
	3/15			5.00	
	3/17			5.25	
	3/18			5.00	
	3/24			5.50	
	3/25	6.00			
	3/26	7.50			
4/30/2004	4/1			4.75	
	4/15			4.00	
	4/22			5.00	
	4/29			4.25	
5/31/2004	5/4	2.00			
	5/5			3.00	
	5/6			3.50	
	5/11	4.00			
	5/12			5.00	
	5/13			4.00	
	5/15			8.00	
	5/19			4.00	
	5/20	2.00			
	5/25			5.00	
	5/26			4.50	
	5/27			3.50	
6/30/2004	6/16			6.00	
	6/17			5.00	
	6/22	3.00			
	6/23			5.00	
	6/30			8.00	
	3/3				\$18.00
	3/4				\$18.00
	3/10				\$18.00
	3/11				\$18.00
	3/15				\$18.00
	3/17				\$18.00
	3/18				\$18.00
	3/24				\$18.00
	4/1				\$18.00
	4/15				\$18.00
	4/22				\$18.00
	4/29				\$18.00
	5/5				\$18.00
	5/6				\$18.00
	5/11		\$18.00		
	5/12				\$18.00

Sierra Joint Community College District  
 Collective Bargaining  
 F/Y 2003-2004  
 Summary of Reimbursable Legal Services  
 John L. Bukey  
 Bukey 1

		<b>Component 3</b>			
<b>Billing</b>	<b>Service</b>	<b>Contract Negotiations</b>			
<b>Date</b>	<b>Date</b>	<b>NP</b>	<b>NP Costs</b>	<b>NT</b>	<b>NT Costs</b>
	5/13				\$18.00
	5/15				\$18.00
	5/19				\$18.00
	5/20		\$18.00		
	5/25				\$18.00
	5/26				\$18.00
	5/27				\$18.00
	6/16				\$18.00
	6/17				\$18.00
	6/22		\$18.00		
	6/23				\$18.00
	6/30				\$18.00
	<b>Totals</b>	<b>35.00</b>	<b>\$90.00</b>	<b>276.00</b>	<b>\$1,026.00</b>

Total Attorney hours @ \$125 = 311.00

<b>Key</b>	<b>NP</b>	<b>Negotiation Preparation</b>
	<b>NT</b>	<b>At-Table Negotiations</b>



# ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
TOTAL GENERAL		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
08/06/03	FUSE Negotiations; Necessary Travel	(4.50)
08/20/03	Joint Labor Management Committee Meeting; Necessary Travel	(4.50)
08/27/03	FUSE Negotiations; Necessary Travel	(5.00)
08/28/03	SCFA Negotiations; Post-negotiations meeting; Necessary Travel	(4.50)
TOTAL COLLECTIVE BARGAINING		18.50

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
TOTAL EXPENSES		\$0.00

# ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		<b>0.00</b>

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
09/03/03	FUSE Negotiations; Necessary Travel	5.00
09/04/03	SCFA Negotiations; Necessary Travel	4.75
09/10/03	FUSE Negotiations; Necessary Travel	5.00
09/11/03	SCFA Negotiations; Necessary Travel	5.00
09/17/03	FUSE Negotiations; Necessary Travel	4.50
09/18/03	SCFA Negotiations and Joint Labor Management Committee Meeting; Necessary Travel	5.00
09/25/03	SCFA Negotiations; Necessary Travel	4.50
<b>TOTAL COLLECTIVE BARGAINING</b>		<b>33.75</b>

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL EXPENSES</b>		<b>\$0.00</b>

## ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
TOTAL GENERAL		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
10/02/03	Meeting on Evaluation with Managers; SCFA Negotiations; Necessary Travel	5.00
10/09/03	SCFA Negotiations; Necessary Travel	5.00
10/21/03	Contract Language Drafting.	0.75
10/23/03	SCFA Negotiations; Post Meeting; Necessary Travel	6.25
10/24/03	FUSE Negotiations; Necessary Travel	5.75
10/28/03	FUSE Negotiations; Necessary Travel	4.50
10/30/03	SCFA Negotiations; Necessary Travel	4.50
TOTAL COLLECTIVE BARGAINING		31.75

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
TOTAL EXPENSES		\$0.00

# ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
TOTAL GENERAL		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
11/05/03	FUSE and JLMC Negotiations; Necessary Travel	5.50
11/06/03	SCFA Negotiations; Necessary Travel	4.00
11/19/03	FUSE Negotiations; Post-Meeting; Necessary Travel	5.00
11/20/03	SCFA Negotiations; Necessary Travel	4.00
11/24/03	FUSE Negotiations; Necessary Travel	3.50
TOTAL COLLECTIVE BARGAINING		22.00

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
TOTAL EXPENSES		\$0.00

# ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	AMT
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	AMT
12/01/03	FUSE Negotiations; Necessary Travel	4.50
12/03/03	FUSE Negotiations; Necessary Travel	4.00
12/04/03	SCFA Negotiations; Necessary Travel	4.50
12/15/03	FUSE Negotiations; Necessary Travel	4.75
12/17/03	FUSE Negotiations; Necessary Travel	4.50
<b>TOTAL COLLECTIVE BARGAINING</b>		22.25

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL EXPENSES</b>		\$0.00

## ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
01/12/04	Negotiations Planning Meeting; Necessary Travel	3.75
01/14/04	FUSE Negotiations; Necessary Travel	5.50
01/15/04	FUSE Negotiations; Necessary Travel	4.25
01/16/04	FUSE Negotiations; Necessary Travel	5.25
<b>TOTAL COLLECTIVE BARGAINING</b>		18.75

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL EXPENSES</b>		\$0.00

## ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	AMOUNT
02/05/04	SCFA Negotiations; Necessary Travel	4.00
02/10/04	Review Draft Contract Language	1.50
02/11/04	FUSE Negotiations; Necessary Travel	3.75
02/25/04	FUSE Negotiations; Necessary Travel	5.00
02/26/04	SCFA Negotiations; Necessary Travel	4.00
<b>TOTAL COLLECTIVE BARGAINING</b>		18.25

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
08/06/03	Travel — 50 Miles @ \$0.36/Mi.	18.00
08/20/03	Travel — 50 Miles @ \$0.36/Mi.	18.00
08/27/03	Travel — 50 Miles @ \$0.36/Mi.	18.00
08/28/03	Travel — 50 Miles @ \$0.36/Mi.	18.00
09/03/03	Travel — 50 Miles @ \$0.36/Mi.	18.00
09/04/03	Travel — 50 Miles @ \$0.36/Mi.	18.00
09/10/03	Travel — 50 Miles @ \$0.36/Mi.	18.00
09/11/03	Travel — 50 Miles @ \$0.36/Mi.	18.00
09/17/03	Travel — 50 Miles @ \$0.36/Mi.	18.00
09/25/03	Travel — 50 Miles @ \$0.36/Mi.	18.00
10/02/03	Travel — 50 Miles @ \$0.36/Mi.	18.00
10/09/03	Travel — 50 Miles @ \$0.36/Mi.	18.00
10/23/03	Travel — 50 Miles @ \$0.36/Mi.	18.00
10/24/03	Travel — 50 Miles @ \$0.36/Mi.	18.00
10/28/03	Travel — 50 Miles @ \$0.36/Mi.	18.00
10/30/03	Travel — 50 Miles @ \$0.36/Mi.	18.00
11/05/03	Travel — 50 Miles @ \$0.36/Mi.	18.00

11/03	Travel — 50 Miles @ \$0.36/Mi.	11/6/03	18.00
11/09/03	Travel — 50 Miles @ \$0.36/Mi.	11/19/03	18.00
11/20/03	Travel — 50 Miles @ \$0.36/Mi.		18.00
11/24/03	Travel — 50 Miles @ \$0.36/Mi.		18.00
12/01/03	Travel — 50 Miles @ \$0.36/Mi.		18.00
12/03/03	Travel — 50 Miles @ \$0.36/Mi.		18.00
12/04/03	Travel — 50 Miles @ \$0.36/Mi.		18.00
12/15/03	Travel — 50 Miles @ \$0.36/Mi.		18.00
12/17/03	Travel — 50 Miles @ \$0.36/Mi.		18.00
01/12/04	Travel — 50 Miles @ \$0.36/Mi.		18.00
01/14/04	Travel — 50 Miles @ \$0.36/Mi.		18.00
01/15/04	Travel — 50 Miles @ \$0.36/Mi.		18.00
01/16/04	Travel — 50 Miles @ \$0.36/Mi.		18.00
02/05/04	Travel — 50 Miles @ \$0.36/Mi.		18.00
02/11/04	Travel — 50 Miles @ \$0.36/Mi.		18.00
02/25/04	Travel — 50 Miles @ \$0.36/Mi.		18.00
02/26/04	Travel — 50 Miles @ \$0.36/Mi.		18.00
<b>TOTAL EXPENSES</b>			<b>\$612.00</b>



## ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
03/03/04	FUSE Negotiations; Necessary Travel	5.00
03/04/04	SCFA Negotiations; Necessary Travel	3.50
03/10/04	JLMC and FUSE Negotiations; Necessary Travel	5.00
03/11/04	SCFA Negotiations; Necessary Travel	4.50
03/15/04	JLMC Negotiations; Necessary Travel	5.00
03/17/04	FUSE Negotiations; Necessary Travel	5.25
03/18/04	SCFA Negotiations; Necessary Travel	5.00
03/24/04	FUSE Negotiations; Necessary Travel	5.50
03/25/04	Negotiation Training	6.00
03/26/04	Negotiation Training	7.50
<b>TOTAL COLLECTIVE BARGAINING</b>		52.25

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL EXPENSES</b>		NONE

# ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
04/01/04	SCFA Negotiations; Necessary Travel	4.75
04/15/04	SCFA and JLMC Negotiations; Necessary Travel	4.00
04/22/04	SCFA Negotiations; Necessary Travel	5.00
04/29/04	SCFA Negotiations; Necessary Travel	4.25
<b>TOTAL COLLECTIVE BARGAINING</b>		18.00

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL EXPENSES</b>		NONE

## ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
05/04/04	Draft Contract Language for Post Medical Retirement Fund	2.00
05/05/04	JLMC Negotiations; Necessary Travel	3.00
05/06/04	SCFA Negotiations, Necessary Travel	3.50
05/11/04	Preparation and Attendance at Board Meeting; Necessary Travel	4.00
05/12/04	FUSE Negotiations; Necessary Travel	5.00
05/13/04	SCFA Negotiations; Necessary Travel	4.00
05/15/04	FUSE and SCFA Negotiations; Necessary Travel	8.00
05/19/04	FUSE Negotiations; Necessary Travel	4.00
05/20/04	SCFA Planning Meeting for Negotiations	2.00
05/25/04	FUSE Negotiations; Necessary Travel	5.00
05/26/04	FUSE and JLMC Negotiations; Necessary Travel	4.50
05/27/04	SCFA Negotiations; Necessary Travel	3.50
<b>TOTAL COLLECTIVE BARGAINING</b>		48.50

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL EXPENSES</b>		NONE

## ITEMIZATION

### GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		0.00

### COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
06/16/04	FUSE Negotiations; Necessary Travel	6.00
06/17/04	SCFA Negotiations; Necessary Travel	5.00
*06/22/04	Board Closed Session; Necessary Travel	3.00
*06/23/04	FUSE Negotiations; Necessary Travel	5.00
*06/30/04	SCFA and FUSE Negotiations Over Salary Formula; Necessary Travel	8.00
<b>TOTAL COLLECTIVE BARGAINING</b>		27.00

### EXPENSES:

DATE	DESCRIPTION	AMOUNT
03/03/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
<del>04/04/04</del> 3/4/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
03/10/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
03/11/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
03/15/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
03/17/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
03/18/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
03/24/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
04/01/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
04/15/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
04/22/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00

04/29/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
05/05/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
05/06/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
05/11/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
05/12/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
05/13/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
05/15/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
05/19/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
05/20/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
05/25/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
05/26/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
05/27/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
06/16/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
06/17/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
*06/22/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
*06/23/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
*06/30/04	Travel C 50 Miles @ \$0.36/Mi.	\$18.00
<b>TOTAL EXPENSES</b>		<b>\$504.00</b>

Sierra Joint Community College District  
Collective Bargaining  
FY 2003-2004  
Summary of Reimbursable Legal Services  
Carney Badley Spellman

Billing Date	Service Date	Employee Contact	Employee Time	Component 3	
				Contract NP	Negotiations Costs
9.16.03	8.11.03			0.80	
	8.26.03			0.30	
	8.27.03	Leland, J	0.30	0.60	
10.20.03	9.12.03	Leland, J	0.30	0.60	
	9.17.03	Leland, J	0.30	0.70	
	9.18.03			1.20	
	9.30.03	Leland, J	0.30	1.20	
	9.9.03				\$257.27
11.12.03	10.14.03	Leland, J	0.30	1.10	
	10.24.03			0.40	
	10.27.03			4.50	
12.12.03	11.05.03			0.50	
	11.20.03	Leland, J	0.30	0.30	
	11.25.03			1.60	
	11.5.03				\$59.85
1.28.04	12.3.03			1.40	
	12.8.03			0.70	
	12.9.03			0.80	
	12.9.03			0.50	
	12.10.03			3.50	
2.24.04	1.30.04				\$98.53
3.17.04	2.9.04			2.40	
	2.11.04			1.80	
	2.13.04			0.40	
	2.19.04			0.50	
	2.23.04			0.50	
	2.24.04			0.90	
	2.24.04			0.70	
4.26.04	3.8.04			0.80	
	3.8.04			2.60	
	3.9.04			1.60	
	3.10.04			0.60	
	3.11.04			0.20	
	3.12.04			3.40	
	3.15.04			4.00	
	3.16.04	Leland, J	0.30	0.30	
	3.18.04			0.50	
	3.18.04	Leland, J	0.30	0.30	
	3.31.04			0.50	
5.27.04	4.1.04	Leland, J	0.90	0.90	
		Smith, D	0.90		
	4.19.04	Leland, J	0.40	0.40	
	4.30.04				\$373.00
6.16.04	5.10.04			0.50	
	5.11.04	Leland, J	1.00	5.00	
		Smith, D	1.00		
	<b>Totals</b>		<b>6.60</b>	<b>49.50</b>	<b>\$788.65</b>

Attorney's Time is Calculated at \$135p/h

Key	NP	Negotiation Preparation
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Sierra Joint Community College District  
 Collective Bargaining  
 F/Y 2003-2004  
 Summary of District Time with  
 Carney Badley Spellman

<b>Billing Date</b>	<b>Service Date</b>	<b>Employee Contact</b>	<b>Employee Time</b>	<b>Component 3 Negotiations NP</b>
9.16.03	8.27.03	Leland, J	0.30	0.30
10.20.03	9.12.03	Leland, J	0.30	0.30
	9.17.03	Leland, J	0.30	0.30
	9.30.03	Leland, J	0.30	0.30
11.12.03	10.14.03	Leland, J	0.30	0.30
12.12.03	11.20.03	Leland, J	0.30	0.30
4.26.04	3.16.04	Leland, J	0.30	0.30
	3.18.04	Leland, J	0.30	0.30
5.27.04	4.1.04	Leland, J	0.90	0.90
		Smith, D	0.90	0.90
	4.19.04	Leland, J	0.40	0.40
6.16.04	5.11.04	Leland, J	1.00	1.00
		Smith, D	1.00	1.00
	<b>Totals</b>		<b>6.60</b>	<b>6.60</b>

<b>Staff Allocation</b>		<b>Total Time</b>	<b>NP</b>
	<b>Leland, J</b>	<b>4.70</b>	<b>4.70</b>
	<b>Smith, D</b>	<b>1.90</b>	<b>1.90</b>
	<b>TOTALS</b>	<b>6.60</b>	<b>6.60</b>

<b>Key</b>	<b>NP</b>	<b>Negotiation Preparation</b>
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**CARNEY  
BADLEY  
SPELLMAN**

LAW OFFICES  
A PROFESSIONAL SERVICE CORPORATION

700 FIFTH AVENUE, SUITE 5800  
SEATTLE, WA 98104-5017

FAX (206) 467-8215  
TEL (206) 622-8020

TAX ID #: 91-0911710

September 16, 2003

Bill Number 49179

File Number SIE009-00001

SIERRA COLLEGE  
ATTN: DOUG SMITH  
5000 ROCKLIN ROAD  
ROCKLIN, CA 95677

Do you have a  
Purchase Order # ?

Re: EMPLOYEE BENEFIT TRUST

PROFESSIONAL SERVICES

Through August 31, 2003

<u>Date</u>	<u>Atty</u>	<u>Description</u>	<u>Time</u>
03/11/03	BSS	Review correspondence from J. Leland and draft response	0.80 Hrs
08/26/03	BSS	Review memos from J. Leland regarding eligibility, etc.; draft e-mail regarding same	0.30 Hrs
08/27/03	BSS	Telephone conference with J. Leland regarding eligibility	0.60 Hrs

TOTAL PROFESSIONAL SERVICES

\$493.00

TOTAL THIS BILL

\$493.00

OUTSTANDING BILLS TO DATE

48691

08/28/03

6,478.00

*pd 9/18/03  
CK# 09671321*

TOTAL DUE

\$6,971.00

*OK to pay*

SEP 22 2003  
ACCOUNTS PAYABLE



**CARNEY  
BADLEY  
SPELLMAN**

LAW OFFICES  
PROFESSIONAL SERVICE CORPORATION

700 FIFTH AVENUE, SUITE 5800  
SEATTLE, WA 98104-5017  
FAX (206) 467-8215  
TEL (206) 622-8020  
TAX ID #: 91-0911710

October 20, 2003

Bill Number 50912

File Number SIE009-00001

SIERRA COLLEGE  
ATTN: DOUG SMITH  
5000 ROCKLIN ROAD  
ROCKLIN, CA 95677

Re: EMPLOYEE BENEFIT TRUST

**PROFESSIONAL SERVICES**

Through September 30, 2003

<u>Date</u>	<u>Atty</u>	<u>Description</u>	<u>Time</u>
09/12/03	BSS	Review Daugherty actuarial work; telephone call to J. <u>Leland</u> and D. Daugherty regarding the same	0.60 Hrs
09/17/03	BSS	Telephone conference with J. <u>Leland</u> ; correspondence with D. Dougherty regarding plan design, actuarial issues	0.70 Hrs
09/18/03	BSS	Prepare for an attend teleconference regarding plan design questions	1.20 Hrs
09/30/03	BSS	Review email and correspondence. Teleconference with J. <u>Leland</u> re plan design issues.	1.20 Hrs

TOTAL PROFESSIONAL SERVICES \$1,073.00

**DISBURSEMENTS**

Through September 30, 2003

Travel

09/09/03 Travel expenses to Sacramento for meeting with Sierra College (3/26-3/28) (BSS)

257.27

\$257.27

**CARNEY  
BADLEY  
SPELLMAN**

LAW OF  
A PROFESSIONAL SERVICE CORP

700 FIFTH AVENUE, SUITE  
SEATTLE, WA 98104

FAX (206) 467-  
TEL (206) 622-  
TAX ID #: 91-09

November 12, 2003

Bill Number 51473

File Number SIE009-00001

SIERRA COLLEGE  
ATTN: DOUG SMITH  
5000 ROCKLIN ROAD  
ROCKLIN, CA 95677

Re: EMPLOYEE BENEFIT TRUST

**PROFESSIONAL SERVICES**

Through October 31, 2003

<u>Date</u>	<u>Atty</u>	<u>Description</u>	<u>Time</u>
10/14/03	BSS	Telephone call from J. Leland regarding expansion of Trust; revise Plan	1.10 Hrs
10/23/03	BSS	Redraft Plan; e-mails with J. Leland	No Charge
10/24/03	BSS	Prepare for JLMC meeting.	0.40 Hrs
10/27/03	BSS	Prepare for and attend meeting with committee on plan design (plus travel from Sacramento)	4.50 Hrs

TOTAL PROFESSIONAL SERVICES \$1,740

TOTAL THIS BILL \$1,740

**OUTSTANDING BILLS TO DATE**

50912 10/20/03 1,330.27

TOTAL DUE \$3,070

*[Handwritten Signature]*  
OK to Pay

**CARNEY  
BADLEY  
SPELLMAN**

LAW OFFICES  
A PROFESSIONAL SERVICE CORPORATION

700 FIFTH AVENUE, SUITE 5800  
SEATTLE, WA 98104-5017

FAX (206) 467-8215  
TEL (206) 622-8020

December 12, 2003

TAX ID #: 91-0911710

Bill Number 60015

File Number SIE009-00001

SIERRA COLLEGE  
ATTN: JEANNE LELAND  
5000 ROCKLIN ROAD  
ROCKLIN, CA 95677

Re: EMPLOYEE BENEFIT TRUST

**PROFESSIONAL SERVICES**

Through November 30, 2003

<u>Date</u>	<u>Atty</u>	<u>Description</u>	<u>Time</u>
11/05/03	BSS	Revise Bulletin	0.50 Hrs
.20/03	BSS	Telephone conference with J. Leland regarding plan design	0.30 Hrs
11/25/03	BSS	Legal research regarding Trust for management units only; Knox Keane application.	1.60 Hrs

TOTAL PROFESSIONAL SERVICES

\$696.00

**DISBURSEMENTS**

Through November 30, 2003

Travel

11/05/03	Travel expenses to meeting in Sacramento (10/26 - 10/27/03) (BSS)	59.85
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\$59.85

TOTAL DISBURSEMENTS

\$59.85

*ok to pay  
Jyn Leland  
12/18/03*

**CARNEY  
BADLEY  
SPELLMAN**

LAW OFFICES  
A PROFESSIONAL SERVICE CORPORATION

700 FIFTH AVENUE, SUITE 5800  
SEATTLE, WA 98104-5017

FAX (206) 467-8215

TEL (206) 622-8020

TAX ID #: 91-0911710

January 28, 2004

Bill Number 53335

File Number SIE009-00001

SIERRA COLLEGE  
ATTN: JEANNE LELAND  
5000 ROCKLIN ROAD  
ROCKLIN, CA 95677

*P.O. Coming*  
*Reg. #338444 to*  
*Purchasing 2/10/04*  
*Mellie*

Re: EMPLOYEE BENEFIT TRUST

**PROFESSIONAL SERVICES**

Through December 31, 2003

<u>Date</u>	<u>Atty</u>	<u>Description</u>	<u>Time</u>
12/03/03	BSS	Legal research on trust only for faculty and management	1.40 Hrs
12/08/03	TMM	Research per S. Saichek's request re: classification of college as a public entity.	0.70 Hrs
12/09/03	SKB	Research whether Sierra Joint Community College District qualifies as a public entity under California Health and Safety Code section 1349.2.	0.80 Hrs
12/09/03	TMM	Review additional research conducted by S. Beebe on "public entity" issue. Telephone call to S. Saichek with results.	0.50 Hrs
12/10/03	BSS	Prepare for and attend meeting with Sierra College committee on plan design issues (and travel from Sacramento)	3.50 Hrs

TOTAL PROFESSIONAL SERVICES

\$1,731.00

*ok to pay*  
*Jeanne Leland*  
*2/3/04*

*\* Done*  
*OK to pay*

CARNEY  
BADLEY  
SPELLMAN

*Attorney for Post 94  
Retirement Medical Trust*

LAW OFFICES  
A PROFESSIONAL SERVICE CORPORATION

700 FIFTH AVENUE, SUITE 5800  
SEATTLE, WA 98104-5017

FAX (206) 467-8215

TEL (206) 622-8020

TAX ID #: 91-0911710

February 24, 2004

Bill Number 54005

File Number SIE009-00001

SIERRA COLLEGE  
ATTN: JEANNE LELAND  
5000 ROCKLIN ROAD  
ROCKLIN, CA 95677

Re: EMPLOYEE BENEFIT TRUST

DISBURSEMENTS

Through January 31, 2004

Travel

10/04 Share of car rental in Sacramento for Sierra College meeting 98.53  
(12/8 - 12/10/03) (BSS)

\$98.53

Computer Research

\$49.50

TOTAL DISBURSEMENTS \$148.03

TOTAL THIS BILL \$148.03

*ok to pay  
3/12/04  
Jeanne Leland*

*P.O. coming  
Reg. 338484 to  
Purchasing 3/4/04  
millie*

*\* [Signature]  
ok to pay*

**CARNEY  
BADLEY  
SPELLMAN**

*ok to pay  
4/2/04*

LAW OFFICES  
A PROFESSIONAL SERVICE CORPORATION

700 FIFTH AVENUE, SUITE 5800  
SEATTLE, WA 98104-5017  
FAX (206) 467-8215  
TEL (206) 622-8020  
TAX ID #: 91-0911710

March 17, 2004

Bill Number 54710  
File Number SIE009-00001

SIERRA COLLEGE  
ATTN: JEANNE LELAND  
5000 ROCKLIN ROAD  
ROCKLIN, CA 95677

*P.O. coming  
Reg. # 338449 to  
Purchasing 4/12/04*

Re: EMPLOYEE BENEFIT TRUST

**PROFESSIONAL SERVICES**

Through February 29, 2004

<u>Date</u>	<u>Atty</u>	<u>Description</u>	<u>Time</u>
02/09/04	TMM	Research California Health and Safety Code 1349.2 per S. Saichek's request. Look for and print regulations and cases issued under this code section. Research state agency interpretations and how to comply with it generally.	2.40 Hrs
02/11/04	TMM	Review Section 1349.2 (California Health and Safety Code) and other code sections referenced therein to determine if we can qualify for exemption from the licensing requirements imposed under the Knox-Keene Act. Review research re: "the director" under the act. Conference with S. Saichek re: same. Telephone call to Department of Managed Care (within Business, Transportation and Housing Agency of State Government) to obtain further guidance on licensing exemptions. Telephone call from Linda McRae in legal department of Department of Managed Care; referred to licensing expert.	1.80 Hrs
02/13/04	BSS	Legal research regarding application of state law	0.40 Hrs
02/19/04	BSS	Draft correspondence to J. Leland and JLMC regarding depositing funds and initial implementation steps	0.50 Hrs
3/04	BSS	Legal research on exemption from Knox-Keane	0.50 Hrs

**CARNEY  
BADLEY  
SPELLMAN**

LAW OFFICES  
A PROFESSIONAL SERVICE CORPORATION

700 FIFTH AVENUE, SUITE 5800  
SEATTLE, WA 98104-5017  
FAX (206) 467-8215  
TEL (206) 622-8020  
TAX ID #: 91-0911710

March 17, 2004

Bill Number 54710  
File Number SIE009-00001

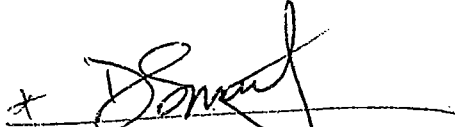
SIERRA COLLEGE

Re: EMPLOYEE BENEFIT TRUST

<u>Date</u>	<u>Atty</u>	<u>Description</u>	<u>Time</u>
02/24/04	BSS	Finalize letter regarding implementation steps	0.90 Hrs
02/24/04	TMM	Exchange email with S. Saichek re: Knox Keene Act exemption and licensing issue generally. Review H&S Code re: same (exemption within exemption concerns).	0.70 Hrs

TOTAL PROFESSIONAL SERVICES \$1,622.50

TOTAL THIS BILL \$1,622.50

\*   
OK to pay

**CARNEY  
BADLEY  
SPELLMAN**

LAW OFFICES  
A PROFESSIONAL SERVICE CORPORATION

700 FIFTH AVENUE, SUITE 5800  
SEATTLE, WA 98104-5017  
FAX (206) 467-8215  
TEL (206) 622-8020  
TAX ID #: 91-0911710

April 26, 2004

Bill Number 55657  
File Number SIE009-00001

*ok to pay  
April 26, 2004*

SIERRA COLLEGE  
ATTN: JEANNE LELAND  
5000 ROCKLIN ROAD  
ROCKLIN, CA 95677

Re: EMPLOYEE BENEFIT TRUST

**PROFESSIONAL SERVICES**

Through March 31, 2004

<u>Date</u>	<u>Atty</u>	<u>Description</u>	<u>Time</u>	<u>Rate</u>	<u>Value</u>
3/04	BSS	Legal research regarding applicable law; conference with T. Materi	0.80 Hrs	290/hr	\$232.00
03/08/04	TMM	Exchange email with S. Saichek re: Knox Keene research and applicable exemptions. Begin review of California Insurance Code to determine if Sierra College is subject to its provisions. Conference with S. Saichek re: findings.	2.60 Hrs	195/hr	\$507.00
03/09/04	TMM	Additional research in California Insurance Code to determine scope/applicability to Medical Expense Reimbursement Plan. Research on Department of Managed Health Care website re: Knox Keene Act applicability and purpose of exemption for colleges. Print and review materials. Telephone call to R. Osen (attorney in California practicing health care licensing) to confer re: research. Conference with S. Saichek re: findings.	1.60 Hrs	195/hr	\$312.00
03/10/04	BSS	Finalize Trust and Plan	2.40 Hrs	290/hr	No Charge
03/10/04	TMM	Telephone call to California attorney Anne O'Connell re: Premium Reimbursement Plan and applicable California law. Telephone call to S. Saichek with additional questions and update on research.	0.60 Hrs	195/hr	\$117.00



April 26, 2004

Bill Number 55657

File Number SIE009-00001

SIERRA COLLEGE

03/11/04	BSS	Correspondence with J. Leland regarding implementation of Trust	0.20 Hrs	290/hr	\$58.00
03/12/04	TMM	Research California Government Code re: applicability of Public Employees' Medical and Hospital Care Act (PEMCA) to Premium Reimbursement Plan. Find and print other guidelines re: fund invested for the payment of employee retiree health benefits (prudent investor standard). Continue drafting memorandum summarizing findings to S. Saichek. Conference with S. Saichek re: same. Telephone call to G. Buddingh re: same. Telephone call to attorney G. Messing re: questions about PEMCA. Telephone call to attorney Anne O'Connell re: same. Review email from A. O'Connell re: PEMCA.	3.40 Hrs	195/hr	\$663.00
03/15/04	BSS	Meeting with JLMC (plus travel from Sacramento)	4.00 Hrs	290/hr	\$1,160.00
03/16/04	TMM	Telephone call to Jeanne Leland at Sierra College re: Joint Power Authority Plan. Telephone call to G. Messing re: guidance on PEMCA.	0.30 Hrs	195/hr	\$58.50
03/18/04	BSS	Draft CBA language and message to J. Leland	0.50 Hrs	290/hr	\$145.00
03/18/04	TMM	Telephone call to J. Leland at Sierra College per S. Saichek's request (re: JPA plan). Telephone call to G. Holt per J. Leland's suggestion.	0.30 Hrs	195/hr	\$58.50
03/31/04	BSS	Finalize Trust and Plan documents	1.50 Hrs	290/hr	No Charge
03/31/04	TMM	Telephone conference with G. Holt re: Premium Reimbursement Plan and applicable law. Telephone call to S. Saichek to update status.	0.50 Hrs	195/hr	\$97.50

TOTAL PROFESSIONAL SERVICES \$3,408.50

May 27, 2004

Bill Number 56393

File Number SIE009-00001

SIERRA COLLEGE  
ATTN: JEANNE LELAND  
5000 ROCKLIN ROAD  
ROCKLIN, CA 95677

Re: EMPLOYEE BENEFIT TRUST

**PROFESSIONAL SERVICES**

Through April 30, 2004

<u>Date</u>	<u>Atty</u>	<u>Description</u>	<u>Time</u>	<u>Rate</u>	<u>Valu</u>
04/01/04	BSS	Telephone call to J. Leland, D. Smith regarding College's participation in Trust	0.90 Hrs	290/hr	\$261.00
04/19/04	BSS	Telephone conference with J. Leland regarding plan definitions; College representative	0.40 Hrs	290/hr	\$116.00

TOTAL PROFESSIONAL SERVICES \$377.00

**PROFESSIONAL SERVICES**

SHANA SAICHEK	1.30 Hrs	290/hr	\$377.00
	1.30 Hrs		\$377.00

**DISBURSEMENTS**

Through April 30, 2004

Travel

04/30/04 Travel expenses for 3/15/04 meeting (BSS) 373.00

\$373.00

TOTAL DISBURSEMENTS \$373.00

*ok to pay  
Jean Leland  
6/1/04*

*6/13 - No PO*

**CARNEY  
BADLEY  
SPELLMAN**

A PROFESSIONAL SERVICE CORPORATION  
700 FIFTH AVENUE, SUITE 580  
SEATTLE, WA 98104-5017  
FAX (206) 467-8211  
TEL (206) 622-8020  
TAX ID #: 91-091171

June 16, 2004

Bill Number 56975  
File Number SIE009-00001

SIERRA COLLEGE  
ATTN: JEANNE LELAND  
5000 ROCKLIN ROAD  
ROCKLIN, CA 95677

RECEIVED  
JUL - 6 2004  
COUNTS PAYABLE

Re: EMPLOYEE BENEFIT TRUST

**PROFESSIONAL SERVICES**

Through May 31, 2004

Date	Atty	Description	Time	Rate	Value
05/10/04	BSS	Draft contract provision and draft letter to J. Leland and J. Bukey regarding tax reporting issues	0.50 Hrs	290/hr	\$145.0
05/11/04	BSS	Meeting with J. Leland, D. Smith and then with Board of Trustees of College (plus travel from Sacramento)	5.00 Hrs	290/hr	\$1,450.0
05/25/04	BSS	Finalize Trust and Plan documents	0.80 Hrs	290/hr	No Charge

POSTED  
JUL 9 2004  
ALL SAICHEK

TOTAL PROFESSIONAL SERVICES **\$1,595.0**

**PROFESSIONAL SERVICES**

SHANA SAICHEK	5.50 Hrs	290/hr	\$1,595.00
SHANA SAICHEK	0.80 Hrs	290/hr	No Charge
	6.30 Hrs		\$1,595.00

*Handwritten signature*

**DISBURSEMENTS**

Through May 31, 2004

Copies 40089 \$0.90

TOTAL DISBURSEMENTS \$0.9

*ok to pay  
J. Leland  
6/23/04*

Sierra Joint Community College District  
Collective Bargaining  
F/Y 2003-2004  
Summary of Reimbursable Legal Services  
Jacobson, Betts Company

Billing Date	Service Date	Component 3	
		NP	Costs
8.1.03	7.1	8.00	
	7.3	11.50	
	7.8	1.50	
	7.14	3.00	
	7.28	9.00	
	7.31	16.00	\$1,124.34
8.30.03	8.5	2.00	
	8.8	6.00	
	8.12	6.00	
	8.14	1.50	
	8.20	16.00	
	8.28	13.00	\$504.66
10.1.03	9.8	2.00	
	9.11	16.00	
	9.15	11.50	
	9.26	16.50	
	9.30	11.00	
	9.30	5.00	\$1,339.77
11.1.03	10.3	2.50	
	10.10	3.00	
	10.17	19.00	
	10.24	26.00	
	10.24	6.00	
	10.30	7.00	\$832.10
11.26.03	11.15	12.00	
	11.12	12.00	
	11.18	11.00	
	11.19	21.00	
	11.26	7.00	\$821.87
12.30.03	12.4	7.00	
	12.10	2.00	
	12.10	7.00	
	12.10	13.00	
	12.29	15.00	\$633.86
1.31.04	1.7	1.00	
	1.12	3.00	
	1.15	24.00	
	1.27	13.00	
	1.31	8.00	\$779.50
2.28.04	2.7	7.00	
	2.9	6.00	
	2.10	2.50	
	2.12	22.00	
	2.27	19.00	\$1,384.00
4.30.04	3.7	5.00	
	3.22	3.00	
	4.12	17.00	
	4.5	3.00	
	4.30	8.00	
	4.30	2.00	
7.7.04	5.10	1.50	
	5.21	3.00	
	6.9	2.00	
	6.16	1.00	
	6.30	2.00	
	<b>Totals</b>	<b>479.00</b>	<b>\$7,420.10</b>

Consultant's Rates are Calculated at \$112.00

Key	NP	Negotiation Preparation
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**JACOBSON, BETTS & COMPANY**  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

August 1, 2003

Professional Services in connection with conducting classified job analysis and compensation consulting from July 1, 2003 through July 31, 2003.

**Professional Fees:**

Jul 1	Classified job analysis, out-of-class, job design. 8.00 hours at \$ 112.00	\$ 896.00
Jul 2, 3	Classified job analysis, Truckee, NCC and HR jobs. 11.50 hours at \$ 112.00	\$ 1,288.00
Jul 7, 8	Classified HR job descriptions. 1.50 hours at \$ 112.00	\$ 168.00
Jul 14	Recruitment assistance. 3.00 hours at no charge.	\$ -
Jul 25, 28	Classified conversion job descriptions-revisions. 9.00 hours at \$ 112.00	\$ 1,008.00
Jul 30-31	Classified negotiations team conf and job analysis. 16.00 hours at \$ 112.00	\$ 1,792.00

*44 hours  
5,488.00*

**Expenses:**

Communications, office	\$ -
Transportation (2 trip, 4xauto)	\$ 745.56
Lodging (3 nights)	\$ 345.02
Meals	\$ 33.76
Other	\$ -

*115.00*

<b>Total Fees</b>	\$ 5,152.00
<b>Total Expenses</b>	\$ 1,124.34
<b>Total Due</b>	\$ 6,276.34

*okay to pay  
8/20/03  
Carland*

Outstanding Balances				
Current	31-60 days	61-90 days	Over 90	
\$ 6,276.34	\$ -	\$ -	\$ -	\$ 6,276.34
<b>Grand Total Due</b>				\$ 6,276.34

*[Signature]*

Thank you. Terms are net end-of-month.

*P.O. # 040197*

JACOBSON, BETTS & COMPANY  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

August 30, 2003

Professional Services in connection with conducting classified job analysis and compensation consulting from August 1, 2003 through August 29, 2003.

Professional Fees:

Aug 5	Lead, and related discussion. (2.00) hours at \$ 112.00	\$ 224.00
Aug 8	Classified job descriptions. (6.00) hours at \$ 112.00	\$ 672.00
Aug 11, 12	Classified job descriptions. (6.00) hours at \$ 112.00	\$ 672.00
Aug 14	Classified job descriptions. (1.50) hours at \$ 112.00	\$ 168.00
Aug 19-20	Job analysis, organization analysis, feedback. (16.00) hours at \$ 112.00	\$ 1,792.00
Aug 21, 25 and 28	Organization design, finance followup, SST job descrip. (13.00) hours at \$ 112.00	\$ 1,456.00
		\$ 4,984.00

Expenses:

Communications, office	\$ -
Transportation (1 trip, public transp.)	\$ 285.50
Lodging (2 nights)	\$ 172.82
Meals	\$ 46.34
Other	\$ -
	\$ 504.66

Total Fees  
Total Expenses

\$ 4,984.00  
\$ 504.66

Total Due

\$ 5,488.66

Outstanding Balances

Current	31-60 days	61-90 days	Over 90
\$ 5,488.66	\$ -	\$ -	\$ -
Grand Total Due			\$ 5,488.66

Thank you. Terms are net end-of-month.

*Handwritten:*  
J. Jacobson  
9/10/03

*Handwritten:* P.O. #046197

600 First Avenue, Suite 426, Seattle, Washington 98104  
Voice: 206-624-4944 FAX: 206-624-4954

**JACOBSON, BETTS & COMPANY**  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

October 1, 2003

Professional Services in connection with conducting classified job analysis and compensation consulting from September 1, 2003 through September 30, 2003.

**Professional Fees:**

Sep 4, 8	Job description -classified, health.	2.00 hours at \$ 112.00	\$ 224.00
✓ Sep 9-11	Classified job analysis.	16.00 hours at \$ 112.00	\$ 1,792.00
Sep 9, 15	Re-organization analysis.	11.50 hours at \$ 112.00	\$ 1,288.00
Sep 22, 24, & 26	Re-organization analysis, related job docs and confer.	16.50 hours at \$ 112.00	\$ 1,848.00
↓ Sep 29-30	Re-organization analysis and related job docs.	11.00 hours at \$ 112.00	\$ 1,232.00
↓ Sep 30	Job analysis and classified descriptions.	5.00 hours at \$ 112.00	\$ 560.00

**Expenses:**

Communications, office	\$ -
Transportation (2 trip, 5xauto)	\$ 878.10
Lodging (4 nights)	\$ 369.60
Meals	\$ 92.07
Other	\$ -

Total Fees	\$ 6,944.00
Total Expenses	\$ 1,339.77
<b>Total Due</b>	<b>\$ 8,283.77</b>

		Outstanding Balances			
		Current	31-60 days	61-90 days	Over 90
\$	8,283.77	\$ -	\$ -	\$ -	\$ -
<b>Grand Total Due</b>		<b>\$ 8,283.77</b>			

Thank you. Terms are net end-of-month.

*Handwritten:*  
K. D. [Signature]  
10/3/03

P.O.# 040197

*Handwritten Signature:* K. D. [Signature]

JACOBSON, BETTS & COMPANY  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

November 1, 2003

Professional Services in connection with conducting classified job analysis and compensation consulting from October 1, 2003 through October 31, 2003.

Professional Fees:

Oct 1, 3	Re-organization matters, IIT. (2.50) hours at \$ 112.00	\$ 280.00
Oct 10	Job descriptions for classified. (3.00) hours at \$ 112.00	\$ 336.00
Oct 13-17	Job descriptions for classified. (19.00) hours at \$ 112.00	\$ 2,128.00
✓ Oct 21-24	Job description reviews for classified. (26.00) hours at \$ 112.00	\$ 2,912.00
✓ Oct 21-24	Re-organization analysis and related job docs. (6.00) hours at \$ 112.00	\$ 672.00
Oct 27, 30	Job description reviews for classified. (7.00) hours at \$ 112.00	\$ 784.00

Expenses:

Communications, office	\$ -
Transportation (1 trip, 4xauto)	\$ 507.50
Lodging (4 nights)	\$ 280.20
Meals	\$ 44.40
Other	\$ -

Total Fees	\$ 7,112.00
Total Expenses	\$ 832.10
<b>Total Due</b>	<b>\$ 7,944.10</b>

		Outstanding Balances			
Current	31-60 days	61-90 days	Over 90		
\$ 7,944.10	\$ -	\$ -	\$ -		
<b>Grand Total Due</b>				<b>\$ 7,944.10</b>	

Thank you. Terms are net end-of-month.

P.O. 040197

600 First Avenue, Suite 426, Seattle, Washington 98104  
Voice: 206-624-4944 FAX: 206-624-4954

11/1/03  
to pay  
for [unclear]

*[Handwritten Signature]*



**JACOBSON, BETTS & COMPANY**  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

November 26, 2003

Professional Services in connection with conducting classified job analysis and compensation consulting from November 1, 2003 through November 30, 2003.

**Professional Fees:**

Nov 3, 13	Job descriptions for classified - admin.			
14, 15	12.00 hours at	\$	112.00	\$ 1,344.00
Nov 10-12	Perf appr system - K Ramirez			\$ 1,344.00
	12.00 hours at	\$	112.00	\$ 1,232.00
Nov 17, 18	Job description reviews - classified admin, trades.			\$ 2,352.00
	11.00 hours at	\$	112.00	\$ 784.00
Nov 17-19	Job description reviews for classified-business gp.			
	21.00 hours at	\$	112.00	
Nov 25, 26	Job descriptions for classified.			
	7.00 hours at	\$	112.00	

and  
11/20

s/b  
4 days

**Expenses:**

Communications, office	\$	
Transportation (1 trip, 4xauto)	\$	473.77
Lodging (3 nights)	\$	275.16
Meals	\$	72.94
Other	\$	-

Total Fees	\$	7,056.00
Total Expenses	\$	821.87
<b>Total Due</b>	\$	<b>7,877.87</b>

	Outstanding Balances			
	Current	31-60 days	61-90 days	Over 90
\$	7,877.87	-	-	-
	Grand Total Due			\$ 7,877.87

Thank you. Terms are net end-of-month.

to pay  
12/15/03

P.O. # 040191

*[Signature]*  
OK to Pay

600 First Avenue, Suite 426, Seattle, Washington 98104  
Voice: 206-624-4944 FAX: 206-624-4954

**JACOBSON, BETTS & COMPANY**  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

December 30, 2003

Professional Services in connection with conducting classified job analysis and compensation consulting from December 1, 2003 through December 30, 2003.

**Professional Fees:**

Dec 3, 4	Job description final drafts for admin, trades. 7.00 hours at \$ 112.00	\$ 784.00
Dec 8-10	Job description reviews for confidential - admin. 2.00 hours at \$ 112.00	\$ 224.00
Dec 8-10	Job description reviews for classified - trades, admin. 7.00 hours at \$ 112.00	\$ 784.00
Dec 8-10	Job analysis - business service and instruction jobs. 13.00 hours at \$ 112.00	\$ 1,456.00
Dec 19, 23 and 29	Job descriptions for admin, trades, bus gps. 15.00 hours at \$ 112.00	\$ 1,680.00

**Expenses:**

Communications, office	\$ -
Transportation (1 trip, 3xauto)	\$ 422.01
Lodging (2 nights)	\$ 186.30
Meals	\$ 25.55
Other	\$ -

<b>Total Fees</b>	\$ 4,928.00
<b>Total Expenses</b>	\$ 633.86
<b>Total Due</b>	\$ 5,561.86

Outstanding Balances			
Current	31-60 days	61-90 days	Over 90
\$ 5,561.86	\$ -	\$ -	\$ -
<b>Grand Total Due</b>			\$ 5,561.86

Thank you. Terms are net end-of-month.

*to pay  
1/15/04*

*OK to pay*

P.O. 040197

JACOBSON, BETTS & COMPANY  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

January 31, 2004

Professional Services in connection with conducting classified job analysis and compensation consulting from January 1, 2004 through January 31, 2004.

Professional Fees:

Jan 7	Job descriptions.				
	(1.00) hours at	\$	112.00	\$	112.00
Jan 12	Job descriptions.				
	(3.00) hours at	\$	112.00	\$	336.00
Jan 13-15	Job description reviews for confidential - admin.				
	(24.00) hours at	\$	112.00	\$	2,688.00
Jan 23, 26 & 27	Adm appraisal system.				
	(13.00) hours at	\$	112.00	\$	1,456.00
Jan 30, 31	Adm appraisal system.				
	(8.00) hours at	\$	112.00	\$	896.00

Expenses:

Communications, office	\$	-
Transportation (1 trip, 3xauto)	\$	460.01
Lodging (3 nights)	\$	277.20
Meals	\$	42.29
Other	\$	-

Total Fees  
Total Expenses

\$ 5,488.00  
\$ (779.50)

Total Due

\$ 6,267.50

Outstanding Balances

Current	31-60 days	61-90 days	Over 90
\$ 6,267.50	\$ -	\$ -	\$ -
<b>Grand Total Due</b>			

\$ 6,267.50

Thank you. Terms are net end-of-month.

*3k to pay  
Jan 31  
2/16/04*

*\* [Signature]*

*P.O. 040197*

JACOBSON, BETTS & COMPANY  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

February 28, 2004

Professional Services in connection with conducting classified job analysis and compensation consulting from February 1, 2004 through February 27, 2004.

Professional Fees:			
Feb 6,7	Perf appr materials. <u>7.00</u> hours at	\$ 112.00	\$ 784.00
Feb 9	Perf appr materials. <u>6.00</u> hours at	\$ 112.00	\$ 672.00
Feb 10	Presentation and prep <u>2.50</u> hours at	\$ 112.00	\$ 280.00
Feb 10-12	Job reviews for instruction support. <u>22.00</u> hours at	\$ 112.00	\$ 2,464.00
Feb 25, 26 & 27	Reorg matters, job des. <u>19.00</u> hours at	\$ 112.00	\$ 2,128.00
<b>Expenses:</b>			
	Communications, office		\$ 64.35
	Transportation (2 trip, 5xauto)		\$ 842.51
	Lodging (4 nights)		\$ 366.88
	Meals		\$ 110.26
	Other		\$ -

Total Fees	\$ 6,328.00
Total Expenses	\$ <u>1,384.00</u>
<b>Total Due</b>	<b>\$ 7,712.00</b>

Outstanding Balances				
Current	31-60 days	61-90 days	Over 90	
\$ 7,712.00	\$ -	\$ -	\$ -	
<b>Grand Total Due</b>				<b>\$ 7,712.00</b>

Thank you. Terms are net end-of-month.

ok to pay  
2. 3/04  
J. [Signature]

P.O. 040197

[Signature]  
OK to pay

**JACOBSON, BETTS & COMPANY**  
 Management Consultants

Sierra College  
 5000 Rocklin Road  
 Rocklin, California 95677

April 30, 2004

Professional Services in connection with conducting classified job analysis and compensation consulting from March 1, 2004 through April 30, 2004.

**Professional Fees:**

Mar 4, 7	IT re-org descriptions.			
	5.00 hours at	\$	112.00	\$ 560.00
Mar 22	IT re-org description revisions.			
	3.00 hours at	\$	112.00	\$ 336.00
Mar 15-16+	Classified descriptions.			
Apr, 5 12	17.00 hours at	No charge		\$ -
Apr 4, 5	IT re-org description revisions.			
	3.00 hours at	\$	112.00	\$ 336.00
Apr misc.	Descriptions, instr support.			
	8.00 hours at	\$	112.00	\$ 896.00
Apr 19, 20 & 30	Descriptions, athletics, superv.			
	2.00 hours at	\$	112.00	\$ 224.00

**Expenses:**

Communications, office	\$ -
Transportation (2 trip, 5xauto)	\$ -
Lodging (4 nights)	\$ -
Meals	\$ -
Other	\$ -

<b>Total Fees</b>	\$ 2,352.00
<b>Total Expenses</b>	\$ -
<b>Total Due</b>	\$ 2,352.00

*ok to pay  
 [Signature]  
 5/11/04*

Outstanding Balances				
Current	31-60 days	61-90 days	Over 90	
\$ 2,352.00	\$ -	\$ -	\$ -	
<b>Grand Total Due</b>				<b>\$ 2,352.00</b>

Thank you. Terms are net end-of-month.

*[Signature]*  
 \* ok to pay

P.O. 040197

**JACOBSON, BETTS & COMPANY**  
Management Consultants

Sierra College  
5000 Rocklin Road  
Rocklin, California 95677

July 7, 2004

Professional Services in connection with conducting classified job analysis and compensation consulting from May 1, 2004 through June 30, 2004.

**Professional Fees:**

May 10	Description - library.			
	1.50 hours at	\$	112.00	\$ 168.00
May 18, 21	Descriptions, and alignment instr support.			
	3.00 hours at	\$	112.00	\$ 336.00
May 3, 18	Descriptions, instr support.			
	6.00 hours at	No charge		\$ -
June 1, 9	Description, graphics.			
	2.00 hours at	\$	112.00	\$ 224.00
June 16	Description, IT.			
	1.00 hours at	\$	112.00	\$ 112.00
June 24, 28 & 30	Description, SBDC			
	2.00 hours at	\$	112.00	\$ 224.00

**Expenses:**

Communications, office	\$ -
Transportation ()	\$ -
Lodging ()	\$ -
Meals	\$ -
Other	\$ -

<b>Total Fees</b>	\$ 1,064.00
<b>Total Expenses</b>	\$ -
<b>Total Due</b>	\$ 1,064.00

		Outstanding Balances			
	Current	31-60 days	61-90 days	Over 90	
	\$ 1,064.00	\$ -	\$ -	\$ -	
	<b>Grand Total Due</b>				\$ 1,064.00

Thank you. Terms are net end-of-month.

*ok to pay  
7/16/04*

*P.O. 040197*

*[Signature]  
OK to pay*

Sierra Joint Community College District  
 Bargaining  
 FY 2003-2004  
 Summary of Reimbursable Legal Services  
 Johnson Schachter Lewis

Billing Date	Service Date	Employee Contact	Employee Time	Component 3 Negotiations		Component 6 Contract Administration				Component 7 PERB									
				NP	AGT	AG	AGT	AGA	Costs	UP	UP \$65p/h	UP Costs							
9.8.03	7.1.03	Martinez, R	0.20																
	7.7.03	Martinez, R	0.30																
	7.7.03	Martinez, R	0.10																
	7.15.03																		
9.25.03	8.6.03	Martinez, R	0.30																
	8.25.03																		
10.17.03	10.17.03				12.40														
10.17.03	9.2.03																		
	9.2.03																		
	9.4.03	Martinez, R	0.10																
	9.12.03	Lynn, M	2.00					2.00											
		Martinez, R	2.00																
		Luditsky-Taylor, T	2.00																
		Albee, N	2.00																
	9.12.03									1.50									
	9.15.03									0.10									
	9.15.03									0.10									
	9.18.03									0.10									
	9.24.03									4.90									
	9.24.03									0.50									
	9.25.03									2.70									
	10.17.03																		
10.17.03	9.29.03																		
	9.29.03									0.20									
	9.30.03									0.80									
	9.30.03									0.20									
	10.17.03																		
11.20.03	10.10.03																		
	10.31.03									3.20									
	10.31.03																		
11.20.03	10.31.03																		
11.20.03	10.3.03					15.60													
	10.3.03																		
	10.6.03																		
	10.9.03																		
	10.13.03									0.10									
	10.13.03									1.20									
	10.13.03									0.90									
	10.13.03									0.10									
	10.13.03									0.10									
	10.13.03									0.50									
	10.13.03									0.10									
	10.13.03									0.10									

Sierra Joint Community College District  
 Collection Bargaining  
 FY 2003-2004  
 Summary of Reimbursable Legal Services  
 Johnson Schachter Lewis

Billing Date	Service Date	Employee Contact	Employee Time	Component 3		Component 6					Component 7		
				NP	AGT	AG	AGT	AGA	Costs	UP	UP \$65p/h	UP Costs	
	10.21.03					4.30							
	10.30.03			0.10									
	10.30.03			1.80									
	10.31.03			1.80									
12.22.03	12.22.03					21.60							
	11.20.03	Martinez, R	0.10										
	11.24.03	McClymonds, J	0.30										
	11.25.03	Martinez, R	0.10										
1.22.04	12.2.03	Martinez, R	0.10			0.10							
	12.3.03	Martinez, R	0.20			0.20							
		Smith, D	0.20										
	12.3.03					0.30							
	12.3.03					0.10							
	12.5.03	Martinez, R	0.30				1.20						
	12.5.03						5.70						
	12.5.03	Martinez, R	0.40				0.40						
	12.5.03						0.60						
	12.8.03	Martinez, R	0.20			0.20							
	12.8.03						0.10						
	12.10.03	Volek, J	1.00				4.20						
	12.11.03						2.30						
	12.15.03						1.80						
	12.15.03						2.10						
	12.16.03						0.10						
	12.18.03	Martinez, R	1.10				1.10						
3.19.04	2.27.04						0.30						
	2.27.04						0.60						
	2.27.04						0.10						
4.30.04	3.19.04					0.10							
	3.19.04					0.10							
	3.25.04	Green, D	0.30										
	3.31.04	Martinez, R	0.10	0.30									
5.19.04	4.21.04								0.10				
	4.21.04	Martinez, R	0.10								0.10		
	4.21.04										0.10		
	4.21.04	Martinez, R	0.10								0.10		



Sierra Joint Community College District  
 Collective Bargaining  
 FY 2003-2004  
 Summary of Reimbursable Legal Services  
 Johnson Schachter Lewis

Billing Date	Service Date	Employee Contact	Employee Time	Component 3			Component 6				Component 7		
				NP	AGT	AG	AI	AGT	AG	AGA	Costs	UP	PERB UP \$65p/h
	4.21.04											0.20	
	4.23.04	Martinez, R	2.00									2.00	
		Volek, J	2.00										
	4.27.04	Martinez, R	0.10									0.10	
	4.27.04											0.20	
	4.27.04											0.10	
	4.30.04												
	4.30.04											7.50	\$58.14
6.16.04	5.3.04											0.50	
	5.3.04											0.80	
	5.4.04												
	5.5.04											3.40	
	5.5.04											0.10	
	5.6.04											0.10	
	5.12.04											1.10	
	5.12.04											0.10	
	5.12.04	Martinez, R	0.10									0.10	
	5.12.04	Leland, J	0.10									0.10	
	5.12.04	Leland, J	0.10									0.70	
	5.12.04											0.10	
	5.12.04											0.10	
	5.12.04											0.50	
	5.12.04											0.10	
	5.12.04											0.10	
	5.12.04											0.10	
	5.12.04											0.60	
	5.13.04											0.10	
	5.14.04											1.50	
	5.14.04											0.40	
	5.17.04												
	5.20.04	Martinez, R	0.10									0.20	
	5.20.04	Green, D	0.10									0.10	
	5.24.04											0.10	
	5.24.04											0.10	
	5.24.04											0.20	
	5.24.04	Martinez, R	0.10									0.10	
	5.24.04											0.10	

Sierra Joint Community College District  
 Collective Bargaining  
 FY 2003-2004  
 Summary of Reimbursable Legal Services  
 Johnson Schachter Lewis

Billing Date	Service Date	Employee Contact	Employee Time	Component 3		Component 6				Component 7			
				NP	AGT	AI	AG	AGA	Costs	UP	PERB		
	5.24.04										0.10		
	5.24.04										0.10		
	5.24.04										0.10		
	5.24.04										0.10		
	5.24.04										0.10		
	5.24.04										0.10		
	5.25.04										2.80		
	5.25.04										0.10		
	5.25.04										0.10		
	5.25.04										0.10		
	5.26.04										0.10		
	5.26.04										0.60		
	5.27.04										0.30		
	5.28.04										1.50		
	6.16.04										4.30		
7.19.04	6.1.04											\$6.83	
	6.2.04										0.10		
	6.2.04											0.50	
	6.2.04										0.10		
	6.3.04										0.10		
	6.3.04											0.10	
	6.4.04										0.30		
	6.4.04											2.30	
	6.17.04										0.10		
	6.29.04										0.10		
	6.30.04										0.10		
	6.30.04										0.30		
	6.30.04										0.10		
	6.30.04											\$0.90	
	Totals		18.30		32.00	32.00	42.50	2.00	0.10	\$42.02	22.10	19.90	\$65.87

Note: Attorney's Rate is calculated at \$135p/h unless noted otherwise

Key	NP	AGT	Tenure Grievances
	AI	AGA	Grievance Arbitration
	AG	UP	Preparation for PERB

Sierra Joint Community College District  
Collective Bargaining  
F/Y 2003-2004  
Summary of District Time spent with  
Johnson Schachter Lewis

Billing Date	Service Date	Employee Contact	Employee Time	Component 3 Negotiation NP	Component 6 Contract Administration				Comp 7 PERB UP
					AI	AG	AGT	AGA	
9.8.03	7.1.03	Martinez, R	0.20		0.20				
	7.7.03	Martinez, R	0.30		0.30				
	7.7.03	Martinez, R	0.10		0.10				
9.25.03	8.6.03	Martinez, R	0.30		0.30				
10.17.03	9.4.03	Martinez, R	0.10		0.10				
	9.12.03	Lynn, M	2.00				2.00		
		Martinez, R	2.00				2.00		
		Ludutsky-Taylor, T	2.00				2.00		
		Albee, N	2.00				2.00		
12.22.03	11.20.03	Martinez, R	0.10			0.10			
	11.24.03	McClymonds, J	0.30			0.30			
	11.25.03	Martinez, R	0.10			0.10			
1.22.04	12.2.03	Martinez, R	0.10			0.10			
	12.3.03	Martinez, R	0.20		0.20				
		Smith, D	0.20		0.20				
	12.5.03	Martinez, R	0.30			0.30			
	12.5.03	Martinez, R	0.40			0.40			
	12.8.03	Martinez, R	0.20			0.20			
	12.8.03	Volek, J	1.00			1.00			
	12.18.03	Martinez, R	1.10			1.10			
4.30.04	3.25.03	Green, D	0.30	0.30					
	3.31.04	Martinez, R	0.10					0.10	
5.19.04	4.21.04	Martinez, R	0.10						0.10
	4.21.04	Martinez, R	0.10						0.10
	4.23.04	Martinez, R	2.00						2.00
		Volek, J	2.00						2.00
	4.27.04	Martinez, R	0.10						0.10
6.16.04	5.12.04	Martinez, R	0.10						0.10
	5.12.04	Leland, J	0.10						0.10
	5.12.04	Leland, J	0.10						0.10
	5.20.04	Martinez, R	0.10						0.10
	5.20.04	Green, D	0.10						0.10
	5.24.04	Martinez, R	0.10						0.10
	<b>Totals</b>		<b>18.30</b>	<b>0.30</b>	<b>1.40</b>	<b>3.60</b>	<b>8.00</b>	<b>0.10</b>	<b>4.90</b>

Staff Allocation	Employee Contact	Total	NP	AI	AG	AGT	AGA	UP
	Albee, N	2.00				2.00		
	Green, D	0.40	0.30					0.10
	Leland, J	0.20						0.20
	Ludutsky-Taylor, T	2.00				2.00		
	Lynn, M	2.00				2.00		
	Martinez, R	8.20		1.20	2.30	2.00	0.10	2.60
	McClymonds, J	0.30			0.30			
	Smith, D	0.20		0.20				
	Volek, J	3.00			1.00			2.00
	<b>TOTALS</b>	<b>18.30</b>	<b>0.30</b>	<b>1.40</b>	<b>3.60</b>	<b>8.00</b>	<b>0.10</b>	<b>4.90</b>

Key	NP	Negotiation Preparation	AGT	Tenure Grievances
	AI	Contract Interpretation	AGA	Grievance Arbitration
	AG	Grievances	UP	Preparation for PERB

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

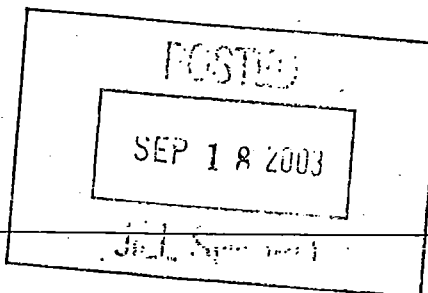
California Plaza  
2180 Harvard Street, Suite 560  
Sacramento, CA 95815  
Telephone: (916) 921-5800  
Tax ID #68-0018049

PRIVILEGED & CONFIDENTIAL

SIERRA JOINT COMMUNITY COLLEGE  
ROBERT WICKSTROM  
5000 ROCKLIN RD  
ROCKLIN CA 95677

September 08, 2003

Invoice No.20494



In Reference To: Sierra CCD - labor  
Our File No. 00046

## Interim Statement for Professional Services Rendered

	<u>Hrs/Rate</u>	<u>Amount</u>
07/01/03 GWH Telephone call to Dr. Ron Martinez re: retiree benefits settlement document.	0.20 145.00/hr	29.00
07/07/03 GWH Extensive telephone conference with Ron Martinez re: upcoming Board meeting and retiree medical benefits.	0.30 145.00/hr	43.50
GWH Telephone call to Dr. Ron Martinez - left extensive message re: Board meeting.	0.10 145.00/hr	14.50
07/15/03 GWH Research and analysis re: whether summer exemption from loading applies to special services faculty; effect of past practice and whether it is subject of mandatory bargaining.	2.50 145.00/hr	362.50
For professional services rendered	3.10	\$449.50
Previous balance		\$1,526.58
7/28/2003 Payment - Thank You. Check No. 09066164		(\$131.88)
Total payments and adjustments		(\$131.88)

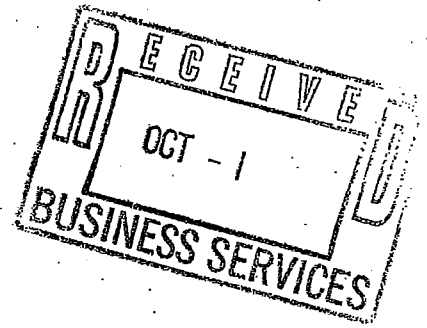
P.O. #040769

*[Handwritten signature]*  
OK to pay  
pay this amount

McV

**JOHNSON SCHACHTER & LEWIS**

A Professional Law Corporation  
California Plaza  
2180 Harvard Street, Suite 560  
Sacramento, CA 95815  
Telephone: (916) 921-5800  
Tax ID #68-0018049



PRIVILEGED & CONFIDENTIAL  
SIERRA COMMUNITY COLLEGE DISTRICT  
ROBERT WICKSTROM  
5000 ROCKLIN RD  
ROCKLIN CA 95677

September 25, 2003

Invoice No.20610

In Reference To: Sierra Community College District - General  
Our File No. 44964

**Interim Statement for Professional Services Rendered**

	<u>Hrs/Rate</u>	<u>Amount</u>
08/04/03 GWH Review and analyze memorandum of coverage with ASCIP for general and automobile liability.	6.80 145.00/hr	986.00
08/05/03 GWH Further analysis ASCIP contract.	7.20 145.00/hr	1,044.00
08/06/03 GWH Research and telephone call to Dr. Ron <del>Martinez</del> re: payment of accrued vacation time for retirees.	5.90 145.00/hr	855.50
GWH Research re: Brown Act issue and telephone call to Susan McVay.	2.80 145.00/hr	406.00
08/11/03 GWH Telephone call to Dr. Kevin M. Ramirez re: closed session meeting.	0.10 145.00/hr	14.50
08/20/03 GWH Telephone from Carla Epting Davis' office re: conference call to discuss subpoenas they have received for student's records	0.20 145.00/hr	29.00
GWH Preparation for conference call with Carla Epting-Davis.	0.10 145.00/hr	14.50

		<u>Hrs/Rate</u>	<u>Amount</u>
08/25/03	GWH Preparation of e-mail to Jene' Hallam re: ASSC promissory note.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Ron Martinez re: summer exemption.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Mick Holsclaw re: Oracle negotiations.	0.10 145.00/hr	14.50
08/26/03	GWH Review and analysis of EPOS Corp. contract.	2.30 145.00/hr	333.50
	GWH Research, analysis and preparation of RFP and proposed contract for food service operation at NCC.	5.80 145.00/hr	841.00
	GWH Research, analysis and preparation of opinion letter re: Administrative Software Procurement RFP.	3.00 145.00/hr	435.00
	GWH Preparation of e-mail to Tina Ludutsky-Taylor re: food service RFP.	0.10 145.00/hr	14.50
	GWH Preparation of lengthy, comprehensive e-mail analyzing RFP for Enterprise Resource Planning System.	1:30 145.00/hr	188.50
	GWH Preparation of e-mail to Bill Silvia at Los Rios Community College District re: preparation of food service RFP for NCC.	0.10 145.00/hr	14.50
	GWH E-mail from Bill Silvia re: copy of Los Rios Community College food service RFP.	0.10 145.00/hr	14.50
	GWH E-mail from Karen Walters-Dunlap re: Sacramento Valley Astronomy Society contract.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Jene' Hallam re: EPOS contract review.	0.10 145.00/hr	14.50

**JOHNSON SCHACHTER & LEWIS**

A Professional Law Corporation

California Plaza

2180 Harvard Street, Suite 560

Sacramento, CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

PRIVILEGED & CONFIDENTIAL

October 17, 2003

SIERRA COLLEGE

ROBERT WICKSTROM

DIRECTOR OF BUSINESS SERVICES

5000 ROCKIN ROAD

ROCKLIN CA 95677

Invoice No.20728

In Reference To: Article 18 Training - Sierra College  
Our File No. 03099

**Professional Services from Primary Client**

*took total*

		<u>Hrs/Rate</u>	<u>Amount</u>
09/04/03	AMS Telephone call with John Weiseltheir re: assignment	145.00/hr	NO CHARGE
	AMS Very lengthy discussion with Michelle Duvol (Faculty Coordinator/Staff Development) re: Article 18 training seminars and faculty peer evaluations	1.00 145.00/hr	145.00
09/07/03	AMS Telephone call to Michelle Duvol	0.10 145.00/hr	14.50
09/08/03	AMS Review of email correspondence from Michelle Duvol	0.10 145.00/hr	14.50
	AMS Preparation of email correspondence to Michelle Duvol	0.10 145.00/hr	14.50
	AMS Review of faxed documents from Michelle Duvol	0.20 145.00/hr	29.00
	AMS Preparation of email correspondence to Michelle Duvol	0.20 145.00/hr	29.00

		<u>Hrs/Rate</u>	<u>Amount</u>
09/10/03	GWH Preparation for seminars re: tenure evaluation.	0.30 145.00/hr	43.50
09/11/03	GWH Review e-mail from Michelle Devol re: tenure evaluation seminars.	0.10 145.00/hr	14.50
09/23/03	GWH Preparation for seminar on non-tenure evaluation training.	0.20 145.00/hr	29.00
09/25/03	AMS Review email correspondence from Michelle Devol re: training sessions	0.10 145.00/hr	14.50
09/26/03	AMS Preparation of email correspondence to Michelle Devol re: training sessions	0.20 145.00/hr	29.00
	AMS Review of further email correspondence from Michelle Devol	0.10 145.00/hr	14.50
	AMS Further email correspondence in response to Ms. Devol's additional inquiries	0.10 145.00/hr	14.50
	GWH Preparation for seminar, including research re: possible conflict between Education Code and SCFA collective bargaining agreement re: grievability of substance of review resulting in denial of tenure or decision not to re-hire probationary faculty member.	1.30 145.00/hr	188.50
09/29/03	AMS Review and analysis of Article 18 and various changes to Article 18 over the last couple of years including union side agreements	2.50 145.00/hr	362.50
	AMS Preparation of materials to distribute during seminars, including hypothetical factual scenarios and several telephone conferences with Ron Martinez re: same	3.50 145.00/hr	507.50



		<u>Hrs/Rate</u>	<u>Amount</u>
09/29/03	GWH Research for Sierra seminar re: non-tenure instructor evaluations, including research re: shared governance.	2.10 145.00/hr	304.50
	GWH Research re: scenarios for shared governance.	0.70 145.00/hr	101.50
	GWH Preparation for seminar, including detailed analysis of Article 18 of SCFA collective bargaining agreement and preparation of summary.	1.70 145.00/hr	246.50
09/30/03	AMS Review of several email correspondences pertaining to seminar	0.30 145.00/hr	43.50
	AMS Further preparation of materials for seminar including hypothetical questions	2.90 145.00/hr	420.50
	GWH Preparation for seminar re: non-tenure faculty evaluation.	145.00/hr	NO CHARGE
	GWH Preparation of email to Judy McClymonds re: non-tenure evaluation seminar.	0.10 145.00/hr	14.50
	GWH Review e-mail from Judy McClymonds re: attendance at seminar.	0.10 145.00/hr	14.50
	GWH Preparation of further e-mail to Judy McClymonds re: attendees at seminar.	0.10 145.00/hr	14.50
	GWH Further e-mail from Judy McClymonds re: attendance at training seminar.	0.10 145.00/hr	14.50
	GWH Further preparation for training seminar, including preparation of hypothetical, research re: shared governance, research re: potential conflict between Education Code and SCFA collective bargaining agreement.	6.60 145.00/hr	957.00

*Johnson  
Schachter  
&  
Holt*

*Invoice # 20728*

SIERRA COLLEGE

Page 4

	<u>Hours</u>	<u>Amount</u>
For professional services rendered	24.80	\$3,596.00
You are responsible for 50.00% of time charges:	12.40	\$1,798.00

Balance due

\$1,798.00

<u>Client</u>	<u>Split bill information</u>	<u>% Total</u>	<u>Total</u>	<u>Payments</u>
ASCIP 03099		50.00%	\$1,798.00	\$0.00
ASCIP SPLIT		50.00%	\$1,798.00	\$0.00

**Timekeeper Summary**

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Alesa M. Schachter	5.70	145.00	\$826.50
George W. Holt	6.70	145.00	\$971.50

*[Signature]*  
OK to pay

*P.O. #040769*

		<u>Hrs/Rate</u>	<u>Amount</u>
09/02/03	GWH Preparation of e-mail to Ron Martinez re: faculty collective bargaining agreement.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Luis Sanchez re: retiree health benefits settlement agreement.	0.10 145.00/hr	14.50
	GWH E-mail from Judy McClymonds re: meeting with Ron Martinez and Morgan Lynn.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Donna Brazil re: Marching Presidents Nature Trail contract.	0.10 145.00/hr	14.50
	GWH Preparation for meeting with Ron Martinez and Morgan Lynn.	0.10 145.00/hr	14.50
	GWH E-mail from Judy McClymonds re: meeting with Ron Martinez and Morgan Lynn.	0.10 145.00/hr	14.50
	GWH Review of e-mail from Donna Brazil re: Marching Presidents Nature Trail contract.	0.10 145.00/hr	14.50
	GWH E-mail from Judy McClymonds re: upcoming meetings with Ron Martinez and Morgan Lynn.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Judy McClymonds re: meeting with Ron Martinez and Morgan Lynn.	0.10 145.00/hr	14.50
	GWH E-mail from Judy McClymonds re: Heather McColgan.	0.10 145.00/hr	14.50
	AMS Review of several emails regarding meeting with Ron Martinez and Morgan Lynn concerning personnel issue and respond to several emails	0.40 145.00/hr	58.00

		<u>Hrs/Rate</u>	<u>Amount</u>
09/03/03	GWH Preparation of e-mail to Lawrence Lee re: upcoming meeting.	0.10 145.00/hr	14.50
	GWH Telephone call to Lawrence Lee re: upcoming meeting.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Lawrence Lee re: details of upcoming meeting.	0.10 145.00/hr	14.50
	GWH Preparation for meeting with Lawrence Lee et al re: changes to computer hacking law, new privacy laws.	3.00 145.00/hr	435.00
	GWH Preparation for meeting with Ron Martinez, et al. re: potential termination of employee.	1.50 145.00/hr	217.50
09/04/03	GWH Telephone call to Dr. Ron <u>Martinez</u> re: status of retiree medical benefits settlement for report to Board.	<u>0.10</u> 145.00/hr	14.50
	GWH Research, analysis and preparation for meeting with Lawrence Lee et al. re: Gramm-Leach Bliley Act.	3.60 145.00/hr	522.00
	GWH Research, analysis and preparation for meeting with Lawrence Lee et al., re: SB 1386 (computer hacking law).	1.30 145.00/hr	188.50
	GWH Preparation of email to Elva Manriquez-Kline at state chancellor's office re: applicability of Gramm-Leach-Bliley Act.	0.10 145.00/hr	14.50
	CR Preparation of documents and informational packets regarding Gramm Leach Bliley Act.	3.00 65.00/hr	195.00
09/05/03	GWH Telephone call to Lawrence Lee's assistant re: meeting.	0.10 145.00/hr	14.50
	GWH Sierra Seminar Re: New Law. Includes travel.	3.00 145.00/hr	435.00

		<u>Hrs/Rate</u>	<u>Amount</u>
09/10/03	GWH Telephone call to Robert Wickstrom re: establishment clause and donating surplus, discarded material to religious school as only entity interested in material.	0.10 145.00/hr	14.50
	GWH Preparation for meeting with Sandra Scott and attorney Tim O'Connor re: numerous Roseville Gateway issues.	2.80 145.00/hr	406.00
09/11/03	GWH Telephone call from Robert Wickstrom re: disposal of unwanted material to religious organization.	0.10 145.00/hr	14.50
	GWH Preparation of correspondence to Robert Wickstrom re: disposal of surplus material to religious organization, including research re: 1st Amendment, Religious Freedom Restoration Act	1.80 145.00/hr	261.00
	GWH Meeting with Sandra Scott/Tim O'Connor re: Roseville Gateway lease issues. Includes travel to Roseville Gateway and preparation time.	3.00 145.00/hr	435.00
	GWH Preparation of email to Robert Wickstrom re: surplus property.	0.10 145.00/hr	14.50
	GWH Begin preparation Performance Review Form based on 49ers' sample.	2.30 145.00/hr	333.50
09/12/03	AMS Meeting with Morgan Lynn, Ron Martinez, Tina Ludutsky-Taylor and Neil Allbee re: personnel issue, non-tenured faculty, tenure review process, recommendations for handling	2.00 145.00/hr	290.00
	AMS Preparation for meeting; review of further documents forwarded by Martinez for review before the meeting and updated version of Article 18 of Applicable Collective Bargaining	1.50 145.00/hr	217.50

		<u>Hrs/Rate</u>	<u>Amount</u>
	Agreement, planning re: further handling		
09/12/03	GWH Begin research and preparation of opinion letter re: use of drawing for prizes connected to purchase of Student ID discount stickers.	3.70 145.00/hr	536.50
09/15/03	GWH Review of email from Luis Sanchez re: retiree health benefits release.	0.10 145.00/hr	14.50
	GWH Preparation of email to Luis Sanchez re: retiree benefits release.	0.10 145.00/hr	14.50
09/16/03	AMS Telephone conference with Vice President Morgan Lynn re: part time personnel issue	0.30 145.00/hr	43.50
09/17/03	GWH Two telephone conversations with Ron Martinez re: termination of part time coach.	0.20 145.00/hr	29.00
	GWH Research re: termination of part time athletic coach in preparation for meeting with John Vuko.	0.80 145.00/hr	116.00
	GWH Preparation for and attend meeting with John Volek re: James Maxey; begin preparation of letters re: performance evaluation, corrections to recent Maxey memo.	2.00 145.00/hr	290.00
	AMS Meeting with John Volek, athletic director, re: personnel issues and preparation for meeting	2.00 145.00/hr	290.00
09/18/03	GWH Preparation of draft correspondence from John Volek to James Maxey re: errors in Maxey's memorandum.	0.80 145.00/hr	116.00
	GWH Telephone conference with Woodrow Wilson re: easement, observatory contract.	0.20 145.00/hr	29.00

		<u>Hrs/Rate</u>	<u>Amount</u>
09/18/03	GWH E-mail from Robert Wickstrom re: NCCLI Facilitator contract.	<u>0.10</u> 145.00/hr	14.50
09/22/03	GWH E-mail from Karen Walters-Dunlap re: astronomy issues.	0.10 145.00/hr	14.50
	AMS Lengthy telephone conference with superintendent re: personnel issue and memo to file regarding same	0.40 145.00/hr	58.00
	AMS Telephone conference with John Volek re: personnel issue	0.30 145.00/hr	43.50
09/23/03	GWH Preparation of email to Karen Walters-Dunlap re: astronomy issues.	0.10 145.00/hr	14.50
	GWH Telephone call from Ms. Becky Poland re: motion to quash subpoena for records.	0.20 145.00/hr	29.00
	GWH Review of email from Ron Martinez re: Connie Sturm.	0.10 145.00/hr	14.50
09/24/03	GWH Research re: what counts as load in calculating 60% level for part-time temporary instructors.	<u>4.90</u> 145.00/hr	710.50
	GWH Preparation for seminar(s) re: non-tenure review committees.	<u>0.50</u> 145.00/hr	72.50
	GWH E-mail from Karen Walters-Dunlap re: astronomy issues.	0.10 145.00/hr	14.50
	GWH Telephone conference with Ron Martinez and Morgan Lynn re: Connie Sturm.	0.20 145.00/hr	29.00
	GWH Analysis of Connie Sturm issues re: HD Dept. in preparation for telephone conference with Ron Martinez.	0.80 145.00/hr	116.00
	GWH Further preparation documents re: James Maxey.	0.50 145.00/hr	72.50

		<u>Hrs/Rate</u>	<u>Amount</u>
09/24/03	AMS Lengthy telephone conference with Connie Sturm re: her complaints about 'hostile environment' and recent email communication	0.60 145.00/hr	87.00
	AMS Review and analysis of email communication with attachments from Ron Martinez re: employee issue; telephone call to Ron Martinez re: recommendations	0.50 145.00/hr	72.50
	AMS Lengthy telephone conference with Morgan Lynn and Ron Martinez re: personnel issues involving HD department	0.50 145.00/hr	72.50
09/25/03	GWH Further research and preparation of opinion letter re: effect of substitute assignments on 60% load.	2.70 145.00/hr	391.50
	GWH Telephone conversation with Robert Wickstrom re: EPOS contract, other issues.	0.10 145.00/hr	14.50
	GWH E-mail correspondence with W. Wilson re: easement.	0.10 145.00/hr	14.50
	AMS Telephone call to Ron Martinez	0.10 145.00/hr	14.50
	GWH Analysis and preparation of lengthy e-mail re: Western Placer USD easement.	0.50 145.00/hr	72.50
	GWH Review of e-mail from Robert Wickstrom re: file-sharing.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Ron Martinez re: 60% issues.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Robert Wickstrom re: EPOS contract.	0.10 145.00/hr	14.50



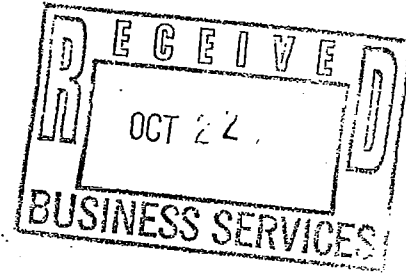
## SIERRA COMMUNITY COLLEGE DISTRICT

Page 0

	<u>Hrs/Rate</u>	<u>Amount</u>
09/30/03 GWH Preparation of email to Ron Martinez and John Volek re: Maxey documents.	0.10 145.00/hr	14.50
GWH Preparation of email to Ron Martinez re: information for revisions to Maxey documents.	0.10 145.00/hr	14.50
GWH Preparation of email to Ron Martinez and John Volek re: Maxey and Skelley hearing.	0.10 145.00/hr	14.50
GWH E-mail from Judy McClymonds re: seminar.	0.10 145.00/hr	14.50
For professional services rendered	<hr/> 80.50	<hr/> \$11,432.50
<b>Additional Charges :</b>		
Photocopy Charges for this period		5.70
Photocopy Charges for this period		116.00
Postal Charges for this period		0.37
Total costs		<hr/> \$122.07 → <u>\$30.52</u>
Total amount of this bill		<hr/> \$11,554.57
Previous balance		\$7,995.80
10/14/2003 Payment - Thank You. Check No. 9072037		<hr/> (\$7,995.80)
Total payments and adjustments		<hr/> (\$7,995.80)

**JOHNSON SCHACHTER & LEWIS**

A Professional Law Corporation  
California Plaza  
2180 Harvard Street, Suite 560  
Sacramento, CA 95815  
Telephone: (916) 921-5800  
Tax ID #68-0018049



PRIVILEGED & CONFIDENTIAL  
SIERRA JOINT COMMUNITY COLLEGE  
ROBERT WICKSTROM  
5000 ROCKLIN RD  
ROCKLIN CA 95677

October 17, 2003

Invoice No.20717

In Reference To: Sierra CCD - labor  
Our File No. 00046

**Interim Statement for Professional Services Rendered**

	<u>Hrs/Rate</u>	<u>Amount</u>
09/25/03 GWH Telephone conversation with Ron Martinez re: James Maxey.	0.10 145.00/hr	14.50
09/29/03 GWH Review of e-mail from Ron Martinez re: decertification.	0.20 145.00/hr	29.00
GWH Research re: District's obligations during attempted decertification by union.	0.80 145.00/hr	116.00
09/30/03 GWH Preparation of email to Ron Martinez re: potential conflice between Education Code and SCFA contract.	0.20 145.00/hr	29.00
For professional services rendered	1.30	\$188.50

**Additional Charges :**

Photocopy Charges for this period	10.60
Total costs	\$10.60
Total amount of this bill	\$199.10
Previous balance	\$1,844.20

*Mandated  
Costs*

**JOHNSON SCHACHTER & LEWIS**

A Professional Law Corporation

California Plaza

2180 Harvard Street, Suite 560

Sacramento, CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

PRIVILEGED & CONFIDENTIAL

November 20, 2003

SIERRA JOINT COMMUNITY COLLEGE

ROBERT WICKSTROM

5000 ROCKLIN RD

ROCKLIN CA 95677

Invoice No.20783

In Reference To: Sierra CCD - labor  
Our File No. 00046

**Interim Statement for Professional Services Rendered**

	<u>Hrs/Rate</u>	<u>Amount</u>
10/10/03 GWH Research and analysis of faculty and classified collective bargaining agreements re: potential use of professional service contracts for members of faculty/classified bargaining units.	3.20 145.00/hr	464.00
For professional services rendered	3.20	\$464.00
<b>Additional Charges :</b>		
10/31/03 Photocopy Charges for this period		0.90
Total costs		\$0.90
Total amount of this bill		\$464.90
Previous balance		\$199.10
11/3/2003 Payment - Thank You. Check No. 0+075817		(\$199.10)
Total payments and adjustments		(\$199.10)

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

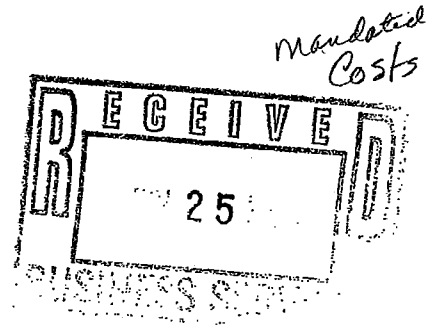
California Plaza

2180 Harvard Street, Suite 560

Sacramento, CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049



PRIVILEGED & CONFIDENTIAL

SIERRA COLLEGE

ROBERT WICKSTROM

DIRECTOR OF BUSINESS SERVICES

5000 ROCKIN ROAD

ROCKLIN CA 95677

November 20, 2003

Invoice No.20776

In Reference To: Article 18 Training - Sierra College  
Our File No. 03099

## Professional Services from Primary Client

*took total*

	<u>Hrs/Rate</u>	<u>Amount</u>
10/01/03 GWH Preparation for seminars.	2.80 145.00/hr	406.00
AMS Further preparation for several seminars on Article 18 training	2.50 145.00/hr	362.50
10/02/03 GWH Preparation for and present two seminars re: Article 18 to deans and staff. Includes travel time.	4.70 145.00/hr	681.50
GWH E-mail from Judy McCymonds re: seminar.	0.10 145.00/hr	14.50
AMS Preparation for training session at Dean Council's meeting re: Article 18 training and Article 18 questions; attendance at Dean Council's meeting; travel to Sierra College	2.90 145.00/hr	420.50
AMS Preparation for first faculty training session; present training session; return travel from Sierra College	3.80 145.00/hr	551.00

		<u>Hrs/Rate</u>	<u>Amount</u>
10/03/03	GWH E-mail from Michel Devol re: non-tenure evaluation training.	0.10 145.00/hr	14.50
	GWH Preparation for and present seminar re: non-tenure faculty evaluation. Includes travel.	3.50 145.00/hr	507.50
	AMS Presenting second faculty training seminar on Article 18, including roundtrip travel to Sierra College	3.50 145.00/hr	507.50
10/09/03	GWH Preparation for and present training seminar on review non-tenure faculty, with travel.	3.60 145.00/hr	522.00
	AMS Presenting final Article 18 training seminar at Sierra College (includes travel time)	3.60 145.00/hr	522.00
10/13/03	GWH Preparation of email to Robert Wickstrom re: training sessions	0.10 145.00/hr	14.50

For professional services rendered  
 You are responsible for 50.00% of time charges:

31.20	\$4,524.00
15.60	\$2,262.00

Previous balance

\$1,798.00

**Balance due**

**\$4,060.00**

*pay this amount*

*# Donez OK to pay P.O. 040769*

<u>Client/Split bill information</u>	<u>% Total</u>	<u>Total</u>	<u>Payments</u>
ASCIP 03099	50.00%	\$2,262.00	\$1,798.00
ASCIP SPLIT	50.00%	\$2,262.00	\$0.00

**Timekeeper Summary**

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Alesa M. Schachter	8.15	145.00	\$1,181.75

		<u>Hrs/Rate</u>	<u>Amount</u>
10/03/03	GWH Review of email from Ron Marinez re: proposed memo re: changes to coaches' contracts, analysis, and preparation of reply.	1.00 145.00/hr	145.00
	GWH E-mail from Peter Drew (Higher Education Sales Manager of EPOS) re: proposed EPOS contract.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Ron Martinez re: proposed changing of coaches's contracts to 'professional expert' contracts.	0.10 145.00/hr	14.50
	GWH Analysis of e-mail from Ron Martinez re: proposed changes to coaches's contracts as 'professional expert' contracts, preparation of proposed changes, research re: problems with use of 'professional expert' contract for coaches.	1.20 145.00/hr	174.00
	GWH E-mail from Gail Modder re: proposed EPOS contract.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Tina Ludutsky-Taylor re: food service RFP's.	0.10 145.00/hr	14.50
10/06/03	GWH Preparation of Nevada Union HSD easement.	3.40 145.00/hr	493.00
	GWH Exchange of numerous email with Margaret White re: drug testing policy.	0.40 145.00/hr	58.00
	GWH Preparation of email to Woody Wilson re: Western Placer USD easement.	0.10 145.00/hr	14.50
	GWH Preparation of Astronomy Society - Foundation agreement.	0.20 145.00/hr	29.00

		<u>Hrs/Rate</u>	<u>Amount</u>
10/06/03	GWH Begin research re: 60% law--effect of (1) whether stipends/grants are loadable; (2)special services such as summer counsellor or librarians working intersessions	0.90 145.00/hr	130.50
	GWH Preparation of revisions to District-Nevada Union HSD easement.	0.20 145.00/hr	29.00
	GWH Telephone conference with Woody Wilson re: revisions to Nevada Union HSD easement.	0.10 145.00/hr	14.50
	GWH Preparation of email to Woody Wilson re: Nevada Union HSD easement.	0.10 145.00/hr	14.50
	GWH Further research and preparation of opinion letter, proposed policy re: drug testing and health care programs.	2.10 145.00/hr	304.50
10/07/03	GWH Receipt of facsimile from Robert Wickstrom re: Angus-Hamer and Strata Information Group contracts (2); analysis; and preparation of reply email.	4.20 145.00/hr	609.00
	GWH Preparation of e-mail to Robert Wickstrom and Lawrence Lee re:SIG contract.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Robert Wickstrom and Lawrence Lee re: Angus-Hamer contract.	0.10 145.00/hr	14.50
	GWH Telephone conference with Lawrence Lee re; transition to risk management position.	0.10 145.00/hr	14.50
	GWH Further research, analysis and preparation of drug testing policy for medical clinics.	2.20 145.00/hr	319.00

		<u>Hrs/Rate</u>	<u>Amount</u>
10/09/03	GWH Preparation of e-mail to Sandra Scott re: status of information from Tim O'Connor (attorney for Roseville Gateway).	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Luis Sanchez re: status of retiree medical benefits release.	0.10 145.00/hr	14.50
	GWH Second telephone call with attorney T. O'Connor re: status of information requested re: Roseville Gateway.	0.10 145.00/hr	14.50
	GWH Review email from Gail Modder re: revisions to EPOS contract, analysis and preparation of changes, preparation of email to Gail Mudder.	0.50 145.00/hr	72.50
	GWH Preparation of e-mail to Sandra Scott re: Roseville Gateway status of information from attorney Tim O'Connor.	0.10 145.00/hr	14.50
	GWH Research and preparation of internship forms.	5.70 145.00/hr	826.50
10/10/03	AMS Telephone conference with Robert Wickstrom concerning personnel issue involving instructional aid and recommendations for handling	0.30 145.00/hr	43.50
	GWH Preparation of e-mail to Ron Martinez re: analysis of Education Code section 88003.1 and professional services contracts.	0.80 145.00/hr	116.00
	GWH Research and preparation of internship forms.	2.60 145.00/hr	377.00
	GWH Research and analysis re: lawfulness of using professional expert contracts for coaches, faculty.	3.40 145.00/hr	493.00



		<u>Hrs/Rate</u>	<u>Amount</u>
10/10/03	GWH Telephone conference with Ron Martinez re: professional expert contracts.	0.20 145.00/hr	29.00
10/13/03	AMS Review of email correspondence from Dolly Green re: personnel issue involving classified employee and potential reassignment; analyze issue; research pertinent provisions of CBA; telephone call to Dolly Green	0.90 145.00/hr	130.50
	GWH Preparation of email to Ron Martinez re: legality of staff reassignment (Blanco).	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Ron Martinez re: retiree medical benefits settlement.	0.10 145.00/hr	14.50
	GWH Analysis of legality of staff reassignment (Blanco).	0.50 145.00/hr	72.50
	GWH E-mail from Luis Sanchez re: retiree medical benefits settlement.	0.10 145.00/hr	14.50
	GWH E-mail from Ron Martinez re: retiree medical benefits settlement.	0.10 145.00/hr	14.50
	GWH Research and preparation of drug test policy for students enrolled in hospital programs.	4.80 145.00/hr	696.00
10/14/03	GWH Telephone call to Mr. T. O'Connor re: Roseville Gateway update.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Sandra Scott re: Roseville Gateway information from attorney Tim O'Connor.	0.10 145.00/hr	14.50
	GWH Telephone conference with Robert Wickstrom re: SIG contract.	0.10 145.00/hr	14.50

		<u>Hrs/Rate</u>	<u>Amount</u>
10/21/03	GWH Telephone call to Dolly Green re: proposed student handout.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Robert Wickstrom re: Yvonne Bartlett contract.	0.10 145.00/hr	14.50
	GWH E-mail from Robert Wickstrom.	0.10 145.00/hr	14.50
	GWH Review of e-mail from Dolly Green re: possible dissemination of printed materials at Outlook article forum.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Dolly Green re: help request for analyzing possible document to be distributed to students.	0.10 145.00/hr	14.50
	GWH Analysis of e-mail from Dolly Green re: request for help re: informational fact sheet to hand out to students during student forum.	0.10 145.00/hr	14.50
	GWH Further research and preparation of astronomy society documents.	4.80 145.00/hr	696.00
	GWH Further research re 60% law--effect of (1) stipends/grants--are they loadable;(2)special services such as summer counsellor or librarians working intersessions	4.30 145.00/hr	623.50
	GWH Preparation of response to student sexual harassment complaints re: Outlook article, including research re: OCR regulations, Title IX complaints.	5.30 145.00/hr	768.50
10/22/03	AMS Review of further email correspondences from District's EEO manager concerning complaints filed by part-time instructor in connection with student newspaper article, email	0.90 145.00/hr	130.50

		<u>Hrs/Rate</u>	<u>Amount</u>
10/28/03	GWH Telephone call to Robert Wickstrom re: construction technology department.	0.20 145.00/hr	29.00
	GWH E-mail from Karen Walters-Dunlap re: astronomy documents.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Ron Martinez re: Christine Vona and increase in her powers as study abroad coordinator.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Ron Martinez re: use of personal services contracts.	0.10 145.00/hr	14.50
	GWH E-mail from Ron Martinez re: use of personal services contracts for coaching positions.	0.10 145.00/hr	14.50
	GWH Further preparation of astronomy documents.	3.80 145.00/hr	551.00
10/29/03	GWH Further research re: Title IX and standing of Scott Suneson to file sexual harassment complaint, preparation of response to complaint.	2.90 145.00/hr	420.50
	GWH Further preparation of astronomy society documents.	4.30 145.00/hr	623.50
10/30/03	GWH Conference call with Dr. Ramirez and executive staff re: Scott Suneson, student complaints.	0.60 145.00/hr	87.00
	GWH E-mail from Lawrence Lee re: CCLC Online Collective Bargaining Database Access Agreement.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Susan McVay re: Scott Suneson.	0.20 145.00/hr	29.00

		<u>Hrs/Rate</u>	<u>Amount</u>
10/30/03	GWH E-mail from Susan McVay re: student complaint about Scott Suneson's failure to teach class.	0.20 145.00/hr	29.00
	GWH Preparation of e-mail to Susan McVay re: potential conference call about Scott Suneson.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Susan McVay re: Scott Suneson.	0.10 145.00/hr	14.50
	GWH Began analysis of CCLC database proposed contract.	1.80 145.00/hr	261.00
	GWH Further preparation of lease requested by Woody Wilson.	2.30 145.00/hr	333.50
	AMS Review and analysis of email correspondences from various administrators at Sierra College re: instructor/personnel/performance issues, formulate recommendations for handling (Suneson)	0.80 145.00/hr	116.00
10/31/03	GWH Analysis of proposed CCLC Collective Bargaining Database Access Agreement and preparation of lengthy e-mail to Lawrence Lee	1.80 145.00/hr	261.00
	GWH Review of e-mail from Sharon Hutching re: Board policies.	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Sharon Hutching re: new Board policies.	0.10 145.00/hr	14.50
	GWH Review of e-mail from Sharon Hutching e-mail from Scott Suneson re: opposition to bond measure.	0.20 145.00/hr	29.00
	GWH Analysis of Scott Suneson letter and whether it is protected by First Amendment.	0.80 145.00/hr	116.00

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

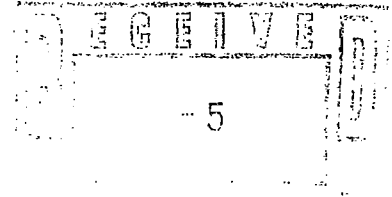
California Plaza

2180 Harvard Street, Suite 560

Sacramento, CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049



PRIVILEGED & CONFIDENTIAL

SIERRA JOINT COMMUNITY COLLEGE

ROBERT WICKSTROM/LAURENCE

LEE

5000 ROCKLIN RD

ROCKLIN CA 95677

December 22, 2003

Invoice No.20846

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In Reference To: Sierra CCD - labor.  
Our File No. 00046

## Interim Statement for Professional Services Rendered

	<u>Hrs/Rate</u>	<u>Amount</u>
11/12/03 GWH Review of faxed correspondence re: attaching second grievance of James Maxey	0.10 145.00/hr	14.50
11/13/03 GWH Research and preparation of proposed response re: Maxey grievance.	2.80 145.00/hr	406.00
11/14/03 GWH Further research and preparation of analysis of Maxey's grievance.	2.60 145.00/hr	377.00
GWH Preparation of e-mail to Ron Martinez re: Maxey grievance, including analysis of grievance and research.	2.30 145.00/hr	333.50
GWH Review and analysis of Pepsi vending machine contract, research re: whether contract gives 22922 Pepsi exclusive vending machine rights and whether 'pour it yourself' dispensers qualify as vending machines. E-mail to Lawrence Lee re: same.	2.90 145.00/hr	420.50

		<u>Hrs/Rate</u>	<u>Amount</u>
11/17/03	GWH E-mail from Ron Martinez re: Maxey grievance and information on Special Services Faculty.'	0.10 145.00/hr	14.50
	GWH Review of e-mail from Ron Martinez re: collective bargaining agreement Article 15 and Maxey grievance.	0.10 145.00/hr	14.50
11/18/03	GWH Review of faxed correspondence from Ron Martinez re: Article 15.	0.10 145.00/hr	14.50
	GWH Lengthy e-mail from Ron Martinez' detailing new information about James Maxey incident.	0.30 145.00/hr	43.50
11/19/03	GWH Further research and preparation of response to Scott Suneson grievance	1.60 145.00/hr	232.00
11/20/03	GWH Telephone call from Ron Martinez re: Maxey grievance.	0.10 145.00/hr	14.50
	GWH Further research and preparation of opinion re: Maxey grievances (9).	4.90 145.00/hr	710.50
	GWH Analysis of faxed correspondence from Ron Martinez re: James Maxey - Unfair Practice charge, preparation of recommendation for handling.	1.50 145.00/hr	217.50
	GWH Preparation of e-mail to Ron Martinez re: analysis of Maxey's grievance.	0.10 145.00/hr	14.50
11/23/03	GWH E-mail from Ron Martinez re: Maxey grievance number 5	0.10 145.00/hr	14.50
	GWH E-mail from Ron Martinez re: Maxey grievance number 4	0.10 145.00/hr	14.50
	GWH E-mail from Ron Martinez re: Maxey grievance number 3	0.10 145.00/hr	14.50
	GWH E-mail from Ron Martinez re: Maxey grievance number 2.	0.10 145.00/hr	14.50

		<u>Hrs/Rate</u>	<u>Amount</u>
11/23/03	GWH E-mail from Ron Martinez re: Maxey grievance number 1	0.10 145.00/hr	14.50
11/24/03	AMS Review and analysis of lengthy email correspondence from Ron Martinez's assistant including 9 proposed grievance responses to grievances filed by Maxey; analysis of grievance responses; initial research re: same; preparation of draft revisions to responses; lengthy telephone conference with Judy (Ron Martinez's assistant) re: same <i>McClymonds</i>	1.80 145.00/hr	261.00
	AMS Preparation of email correspondence to Judy (Ron Martinez's assistant) re: grievances	0.20 145.00/hr	29.00
	GWH E-mail from Judy McClymonds re: Maxey grievances	0.10 145.00/hr	14.50
	GWH Began analysis and preparation of proposed responses to Maxey grievances 3 through 9	0.30 145.00/hr	43.50
	GWH E-mail from Ron Martinez re: Maxey grievances 6-9	0.10 145.00/hr	14.50
11/25/03	GWH Review, analysis and preparation of District responses to Maxey grievances #3-9.	0.70 145.00/hr	101.50
	GWH Telephone conference with Ron Martinez re: Maxey grievances.	0.10 145.00/hr	14.50
	GWH Analysis of Maxey grievance number 5, preparation of recommended response, preparation of e-mail	0.40 145.00/hr	58.00
	GWH Analysis of Maxey grievance number 4, preparation of recommended response, preparation of e-mail.	0.30 145.00/hr	43.50

*Johnson Schachtel & Lewis*  
*Invoice # 20846*

SIERRA JOINT COMMUNITY COLLEGE

Page 4

	<u>Hrs/Rate</u>	<u>Amount</u>
11/25/03 GWH Analysis of Maxey grievance number of 3, preparation of proposed response, preparation of e-mail	(0.40) 145.00/hr	58.00
GWH Preparation of e-mail to Ron Martinez re: new information on Maxey's behavior	(0.10) 145.00/hr	14.50
For professional services rendered	24.50	\$3,552.50
Previous balance	- 2.90	\$464.90
12/8/2003 Payment - Thank You, Check No. 09077334	21.60	(\$464.90)
Total payments and adjustments		(\$464.90)

\* *[Signature]*  
 OK to pay

P.O. 041889



**JOHNSON SCHACHTER & LEWIS**

A Professional Law Corporation

California Plaza

2180 Harvard Street, Suite 560

Sacramento, CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

Millie  
JAN 28 2004

PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT

ROBERT WICKSTROM

5000 ROCKLIN RD

ROCKLIN CA 95677

January 22, 2004

Invoice No.20919

In Reference To: Sierra Community College District - General  
Our File No. 44964

**Interim Statement for Professional Services Rendered**

		<u>Hrs/Rate</u>	<u>Amount</u>
12/01/03	AMS Preparation of audit letter to Gilbert Associates re: status of all pending claims	1.20 145.00/hr	174.00
	GWH Further preparation of proposed response to Scott Suneson discrimination complaint re: Outlook article	2.70 145.00/hr	391.50
	GWH Review of correspondence from Lawrence Lee re: enclosing several documents for review	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Dolly Green re: Scott Suneson complaint and Faculty Handbook	0.10 145.00/hr	14.50
12/02/03	GWH Telephone call from Ron (Martinez) re: Maxey grievance hearing	0.10 145.00/hr	14.50
	GWH Review and analysis of Enron and WorldCom bankruptcy documents, and preparation of e-mail to Lawrence Lee re: recommendations	1.50 145.00/hr	217.50

	<u>Hrs/Rate</u>	<u>Amount</u>
12/03/03 GWH Further research re: limits of academic freedom on deviation from curriculum by Scott Suneson	4.90 145.00/hr	710.50
GWH Conference call from Ron (Martinez), Doug (Smith), John Bukey re: retiree medical benefits recent developments.	0.20 145.00/hr	29.00
GWH Review of faxed correspondence from Morgan Lynn re: Scott Suneson (approximately 11 pages)	0.50 145.00/hr	72.50
GWH Review of further faxed documents from Morgan Lynn re: Scott Suneson (approximately 15 pages)	0.10 145.00/hr	14.50
GWH Telephone conversation with Ron Martinez re: non-renewal of Maxey's contract	0.20 145.00/hr	29.00
GWH Further research and analysis re: music copyright issues.	0.10 145.00/hr	14.50
GWH E-mail from Morgan Lynn re: Scott Suneson evaluation.	0.10 145.00/hr	14.50
GWH E-mail from Morgan Lynn re: Scott Suneson teaching schedule.	0.10 145.00/hr	14.50
GWH Preparation of e-mail to Morgan Lynn re: Suneson information request.	0.10 145.00/hr	14.50
GWH E-mail from Morgan Lynn re: Suneson's teaching schedule and failure to complete curriculum.	0.20 145.00/hr	29.00
GWH Preparation of e-mail to Morgan Lynn re: Suneson's evaluation.	0.10 145.00/hr	14.50
GWH E-mail from Morgan Lynn re: evaluation process for Scott Suneson.	0.10 145.00/hr	14.50

		<u>Hrs/Rate</u>	<u>Amount</u>
12/03/03	GWH Preparation of e-mail to Morgan Lynn re: teaching of curriculum and academic freedom	0.10 145.00/hr	14.50
	GWH E-mail from Dolly Green re: proposed revised draft letter to student complainants re: Outlook article	0.10 145.00/hr	14.50
	GWH Analysis of proposed letter to student complainants re: lack of sexual harassment re: Outlook article	0.10 145.00/hr	14.50
	GWH Exchange of e-mail with Judy McClymonds re: conference call to discuss retiree medical benefits	0.30 145.00/hr	43.50
	GWH Second exchange of e-mail with Judy McClymonds re: retiree medical benefits conference call	0.10 145.00/hr	14.50
	GWH E-mail from Dolly Green re: proposed revised draft letter to student sexual harassment complainants (Outlook article)	0.10 145.00/hr	14.50
12/04/03	JPL Further research and preparation of opinion letter re: copyright law pertaining to transmission of copyrighted materials over college radio station during breaks between educational programming, and to music played while caller is on hold	1.90 90.00/hr	171.00
	GWH Review of faxed consultant contract amendment from Millie Roberts (approximately 6 pages)	0.10 145.00/hr	14.50
	GWH Research, analysis and preparation of proposed amendments to Foundation Articles of Incorporation re: donations for bond campaign.	6.50 145.00/hr	942.50

	<u>Hrs/Rate</u>	<u>Amount</u>
12/05/03 GWH E-mail from Dolly Green re: Scott Suneson.	0.10 145.00/hr	14.50
GWH Research, analysis and telephone conference with Ron Martinez re: Maxey personnel file and alleged Education Code and Labor Code violations for failure to place contracts in Maxey's file	1.20 145.00/hr	174.00
GWH Analysis of fax correspondence from Maxey's attorney re: alleged Education Code and Labor Code violations for failure to keep Maxey's contract in personnel file; research re: same	5.70 145.00/hr	826.50
GWH Exchange of several telephone calls with Ron Martinez re: attorney Geddes's (James Maxey) request for information.	0.40 145.00/hr	58.00
GWH Review of correspondence sent to Placer County Grand Jury by Kevin Ramirez re: 2002-03 final report	0.10 145.00/hr	14.50
GWH Review of faxed correspondence from Ron Martinez re: packet sent to James Maxey's attorney (approximately 13 pages)	0.60 145.00/hr	87.00
GWH E-mail from Woody Wilson re: Western Placer USD/Sierra College purchase and sale agreement	0.10 145.00/hr	14.50
GWH Preparation of e-mail to Lawrence Lee re: copyright issue and new SESAC letter	0.10 145.00/hr	14.50
GWH E-mail from Lawrence Lee re: third SESAC letter	0.10 145.00/hr	14.50
GWH Begin analysis of proposed changes to regular consultant contract.	0.90 145.00/hr	130.50

		<u>Hrs/Rate</u>	<u>Amount</u>
12/05/03	GWH Further research and analysis re: copyright issue and SESAC	3.00 145.00/hr	435.00
12/08/03	GWH Telephone call to Ron <u>Martinez</u> re: James Maxey	<u>0.20</u> 145.00/hr	29.00
	GWH Review of faxed correspondence from Lawrence Lee re: SESAC license for TV music	0.10 145.00/hr	14.50
	GWH Exchange of e-mail with Doug Smith re: status of Foundation as Internal Revenue Code section 501(h) entity	0.20 145.00/hr	29.00
	GWH E-mail from Doug Smith re: change of foundation status to Internal Revenue Code section 501(h).	0.20 145.00/hr	29.00
	GWH Exchange of e-mail with Lawrence Lee re: copyright inquiry	0.20 145.00/hr	29.00
	GWH Preparation of e-mail to Ronald <u>Martinez</u> re: response to attorney Marguerite Geddes correspondence	<u>0.10</u> 145.00/hr	14.50
	GWH Further research and preparation of opinion letter re: copyright issues.	2.20 145.00/hr	319.00
	GWH Preparation for and meeting with John <u>Volek</u> re: James Maxey evaluation at District offices, including travel.	<u>4.20</u> 145.00/hr	609.00
12/09/03	JPL Telephone conference with Alan Altman of SESAC re: copyright matters	0.10 90.00/hr	9.00
	JPL Preparation of correspondence to Alan Altman confirming telephone conference	0.30 90.00/hr	27.00
	GWH Research re: ability of District to purchase bus from City of Baldwin without public bid, Public Contract Code section 20652, preparation of e-mail to Ray Cunningham	5.80 145.00/hr	841.00

		<u>Hrs/Rate</u>	<u>Amount</u>
12/09/03	GWH Second meeting with John Volek re: Maxey evaluation, including travel to District offices.	2.00 145.00/hr	290.00
	GWH Preparation of draft evaluation of James Maxey, including extensive review of J. Volek's files and pertinent e-mail	5.30 145.00/hr	768.50
12/10/03	GWH Research re: Foundation and Internal Revenue Code section 501(h) status; preparation of amendment to Foundation Articles of Incorporation re: support for bond campaigns; preparation of extensive e-mail to Doug Smith	3.80 145.00/hr	551.00
	GWH Further preparation James Maxey review.	2.30 145.00/hr	333.50
12/11/03	GWH Further preparation Maxey review.	1.80 145.00/hr	261.00
	GWH Research and preparation of policy re: regulating vendor and other third party access to students, e.g., tables etc. in cafeteria, First Amendment issues including content regulation and reasonable time, place and manner restrictions.	6.50 145.00/hr	942.50
	JPL Research copyright questions: do broadcasts of public radio offerings on distance learning station during downtimes violate copyright laws?	3.10 90.00/hr	279.00
12/12/03	GWH Telephone call from Robert Wickstrom re: insurance coverage.	0.10 145.00/hr	14.50
	GWH Telephone conference with Greg Schneider re: purchase of bus from City of Brentwood. Research re: Public Contract Code.	2.10 145.00/hr	304.50

		<u>Hrs/Rate</u>	<u>Amount</u>
12/15/03	JPL Prepare memorandum in response to copyright questions posed by Lawrence Lee	5.30 90.00/hr	477.00
	GWH Telephone conference with Ron Martinez re: numerous subjects, including removal of items from employee personnel file	0.20 145.00/hr	29.00
	GWH Research and preparation of opinion email re: ability of District to remove portions of employee's personnel file.	4.10 145.00/hr	594.50
	GWH Preparation of James Maxey evaluation, including analysis of extensive employee files.	2.10 145.00/hr	304.50
	AMS Telephone conferences with Risk Managers re: new lawsuit (Carl v. Coast Community College District) and recommendations for handling; lengthy telephone conference with Michael Declues, defense attorney who will be handling lawsuit on behalf of California Community College Districts, status of lawsuit and possible association of counsel	0.90 145.00/hr	130.50
12/16/03	GWH Telephone conference with attorney Margaret A. Geddes re: James Maxey grievance	0.10 145.00/hr	14.50
	GWH Telephone conversation with Ron Martinez re: collecting overpayment of employee wages, and research re same	1.10 145.00/hr	159.50
	GWH Review and analysis of proposed changes to consultant agreement	2.20 145.00/hr	319.00
	GWH Analysis of proposed Morgan Lynn letter to G. Guckel re: inadequate performance, preparation of suggested changes, research re: procedure for termination of	5.90 145.00/hr	855.50

Johnson S Racker & Lewis  
Invoice No. 20919

SIERRA COMMUNITY COLLEGE DISTRICT

Page 0

		<u>Hrs/Rate</u>	<u>Amount</u>
	certificated employee for unsatisfactory performance		
12/17/03	JPL Further analysis of various copyright questions, particularly into case law pertaining to retransmissions and infringement of copyright in sound recordings	2.60 90.00/hr	234.00
12/18/03	GWH Telephone conference with Ron Martinez re: James Maxey, further preparation of review	1.10 145.00/hr	159.50
	GWH Preparation of correspondence to attorney Michael Declues re: Carl v. Coast Community College	0.40 145.00/hr	58.00
	GWH Telephone conference with Millie Roberts re: amendment to Foundation's Articles of Incorporation and preparation of amendments.	3.10 145.00/hr	449.50
12/19/03	GWH Preparation of Foundation agenda and related items re: Foundation amendment to Articles of Incorporation	2.10 145.00/hr	304.50
12/22/03	GWH Preparation of e-mail to Morgan Lynn re: review of draft memorandum (Gary Guckle)	0.10 145.00/hr	14.50
12/30/03	GWH E-mail from Sandra Scott re: Roseville Gateway lease	0.10 145.00/hr	14.50
12/31/03	GWH E-mail from Robert A. Laurie re: Western Placer-Sierra College purchase agreement	0.10 145.00/hr	14.50
	For professional services rendered	118.90	\$16,349.50
	Previous balance		\$12,312.45
1/20/2004	Payment - Thank You. Check No. 09078097		(\$12,312.45)
	Total payments and adjustments		(\$12,312.45)



		<u>Hrs/Rate</u>	<u>Amount</u>
	re: same; preparation of e-mail to Lawrence Lee.		
02/26/04	GWH Telephone call to Woodrow Wilson re: Nevada Union easement	0.10 145.00/hr	14.50
	GWH Review of correspondence from Morgan Hill re: Gary Guckel	0.10 145.00/hr	14.50
	GWH E-mail from Lawrence Lee re: March 9 closed session Board meeting	0.10 145.00/hr	14.50
	GWH E-mail from Lawrence Lee re: new Board Policy 3810	0.20 145.00/hr	29.00
	GWH Preparation of email to Lawrence Lee re: new Board Policy 3810	0.10 145.00/hr	14.50
	GWH E-mail from Lawrence Lee re: analysis of Board Policies 3350 and 3810	0.40 145.00/hr	58.00
	GWH Research re: local claim filing procedures under Tort Claims Act, analysis of Board Policy 3820, and preparation of email to Lawrence Lee	2.30 145.00/hr	333.50
02/27/04	GWH Analysis of proposed response to Maxey grievance	0.30 145.00/hr	43.50
	GWH Telephone call from Joyce Lopes re: piggybacking bid for portable classrooms	0.20 145.00/hr	29.00
	GWH Analysis of extensive bid documents to determine if District can piggyback purchase of modular classroom onto Western Placer RFP for modular restrooms	2.30 145.00/hr	333.50
	GWH Telephone call to Joyce Lopes re: modular classrooms	0.30 145.00/hr	43.50
	GWH E-mail from Sandra Scott re: TRI (Gateway) lease	0.10 145.00/hr	14.50
	GWH E-mail from Joyce Lopes re: Nissan agreement, and analysis of contract	3.10 145.00/hr	449.50
	GWH Exchange of numerous e-mail from Lawrence Lee re: closed session Board meeting	0.30 145.00/hr	43.50

Johnson Schachter & Lewis

Invoice 21068

March 19, 2004

SIERRA COMMUNITY COLLEGE DISTRICT

Page 6

	<u>Hrs/Rate</u>	<u>Amount</u>
02/27/04 GWH Preparation of email to Judy McClymonds re: draft letter to James Maxey re: grievance outcome, including analysis of proposed letter	0.60 145.00/hr	87.00
GWH E-mail from Judy McClymonds re: proposed letter to James Maxe	0.10 145.00/hr	14.50
For professional services rendered	81.50	\$11,817.50

**Additional Charges :**

01/31/04 WestLaw research charges for January 2004	96.21
02/18/04 Mileage to Roseville Gateway for meeting	9.38
02/28/04 Photocopy Charges for this period	1.60
Facsimile Charges for this period	7.00
Postal Charges for this period	1.20
Total costs	\$115.39

Total amount of this bill

\$11,932.89

Previous balance

\$24,976.81

2/19/2004 Payment - Thank You. Check No. 09081708


(\$16,349.50)

3/5/2004 Payment - Thank You. Check No. 09082924

(\$8,627.31)

Total payments and adjustments

(\$24,976.81)

  
OK to pay

P.O. 041889

		<u>Hrs/Rate</u>	<u>Amount</u>
Millie Roberts			
03/15/04	GWH Telephone call from Diane McKnight re: potentially paranoid employee	0.10 145.00/hr	14.50
03/16/04	GWH E-mail from Sandra Scott re: attorney Tim O'Connor	0.10 145.00/hr	14.50
03/18/04	GWH E-mail from Greg Schneider re: standard bid language review	0.10 145.00/hr	14.50
03/19/04	GWH Preparation of e-mail to Kevin Ramirez re: health benefits	0.10 145.00/hr	14.50
	GWH Preparation of second e-mail to Kevin Ramirez re: health benefits	0.10 145.00/hr	14.50
03/22/04	GWH Analysis of Article 3.3 of Instructions to Bidders, preparation of e-mail to Greg Schneider	1.50 145.00/hr	217.50
	GWH Preparation of e-mail to Mandy Davies re: concurrent enrollment	0.10 145.00/hr	14.50
	GWH Research and analysis of lifetime health benefits, Government Code section 53201, preparation of e-mail to Kevin Ramirez	1.50 145.00/hr	217.50
	GWH E-mail from Lawrence Lee re: Policy 3810	0.10 145.00/hr	14.50
	GWH Preparation for and attendance at meeting with Mandy Davies re: concurrent enrollment issues, with travel to Sierra College	3.60 145.00/hr	522.00
03/23/04	AMS Telephone conference with Superintendent/President re: meeting agenda items; research re: Brown Act concerning same	1.50 145.00/hr	217.50
03/24/04	GWH Preparation of e-mail to Lawrence Lee re: Board Policy 3810	0.10 145.00/hr	14.50
03/25/04	AMS Review email correspondence from Ron Martinez	0.10 145.00/hr	14.50
	AMS Preparation of responsive email correspondence	0.10 145.00/hr	14.50
	AMS Telephone conference with Dolly Green re: issue (potential complaint against FUSE)	0.30 145.00/hr	43.50

		<u>Hrs/Rate</u>	<u>Amount</u>
03/25/04	GWH Telephone call to Joyce Lopes re: auxiliary organizations, Foundation, numerous issues.	0.60 145.00/hr	87.00
	GWH E-mail from Millie Roberts re: notice of completion for microwave system	0.20 145.00/hr	29.00
	GWH Preparation of e-mail to Ron Martinez re: nursing program	0.10 145.00/hr	14.50
	GWH Analysis of proposed agenda language for March 13 Board meeting	0.10 145.00/hr	14.50
03/26/04	GWH E-mail from Joyce Lopes re: Sierra College Foundation and Education Code auxiliary organizations, including research	3.10 145.00/hr	449.50
	GWH Preparation of e-mail to Joyce Lopes re: Education Code auxiliary organization statutes	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Millie Roberts re: Notice of Completion	0.30 145.00/hr	43.50
03/29/04	GWH E-mail from Millie Roberts re: bid award	0.10 145.00/hr	14.50
	GWH Research and preparation of e-mail to Millie Roberts re: amphitheater bid award	4.80 145.00/hr	696.00
	GWH E-mail from Millie Roberts re: amphitheater bid award	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Millie Roberts re: amphitheater bid award	0.10 145.00/hr	14.50
	GWH E-mail from Millie Roberts re: campus plaza amphitheater bid award	0.10 145.00/hr	14.50
03/30/04	GWH E-mail from Susan McVay re: closed session Board agenda language	0.10 145.00/hr	14.50
03/31/04	GWH Telephone call from Ron Martinez re: James Maxey arbitration.	0.10 145.00/hr	14.50
	GWH E-mail from Susan McVay re: Brown Act issue	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Susan McVay re: off campus closed session Board meeting	0.10 145.00/hr	14.50

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# JOHNSON SCHAchter & LEWIS

A Professional Law Corporation

California Plaza

2180 Harvard Street, Suite 560

Sacramento, CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

PRIVILEGED & CONFIDENTIAL

May 19, 2004

SIERRA COMMUNITY COLLEGE DISTRICT  
RON MARTINEZ  
5000 ROCKLIN ROAD  
ROCKLIN CA 95677

Invoice No.30029

In Reference To: James C. Maxey v. Sierra Joint CCD  
Our file: 04036/GWH

## Interim Statement for Professional Services Rendered

	<u>Hrs/Rate</u>	<u>Amount</u>
04/21/04 GWH Telephone call to Bernard McMonigle of PERB requesting extension of time to file response to Maxey unfair practice charge	0.10 145.00/hr	14.50
GWH Telephone call to Ron Martinez re: Maxey unfair practice charge	0.10 145.00/hr	14.50
GWH Telephone call from Bernard McMonigle re: extension of time to respond to unfair practice charge	0.10 145.00/hr	14.50
GWH Telephone call from Ron Martinez re: Maxey unfair practice charge	0.10 145.00/hr	14.50
GWH Preparation of correspondence to Bernard McMonigle re: Maxey extension of time to respond to unfair practice charge	0.20 145.00/hr	29.00
04/23/04 GWH Meeting with Ron Martinez John Volek re: Maxey	2.00 145.00/hr	290.00
04/27/04 GWH Telephone call to Ron Martinez re: filing response to Unfair Practice Charge	0.10 145.00/hr	14.50
GWH Telephone call to Bernard McMonigle of PERB re: filing response to Unfair Practice Charge.	0.20 145.00/hr	29.00

all to pay.  
jme

	<u>Hrs/Rate</u>	<u>Amount</u>
04/27/04 GWH Preparation of e-mail to Ron Martinez re: meeting with John Volek	0.10 145.00/hr	14.50
04/30/04 LJ Initial organization of all documents concerning James Maxey in possession of College, including comparison to delete duplicate copies (over 600 pages), putting all documents in chronological order and assigning each page an index number (paralegal)	7.50 65.00/hr	487.50
For professional services rendered	10.50	\$922.50

**Additional Charges :**

04/30/04 Photocopy Charges for this period	57.40
Postal Charges for this period	0.74
Total costs	\$58.14

Total amount of this bill \$980.64

**Balance due** \$980.64

**Timekeeper Summary**

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
George W. Holt	3.00	145.00	\$435.00
Lanee Johnson	7.50	65.00	\$487.50

*\* [Signature] OK to pay*

P.O. ~~043040~~  
043040

# JOHNSON SCHACHTER & LEWIS

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California Plaza

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Tax ID #68-0018049



PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT

RON MARTINEZ

5000 ROCKLIN ROAD

ROCKLIN CA 95677

June 16, 2004

*To Millie*

Invoice No.30135

In Reference To: James C. Maxey v. Sierra Joint CCD  
Our file: 04036/GWH

## Interim Statement for Professional Services Rendered

		<u>Hrs/Rate</u>	<u>Amount</u>
05/03/04	GWH Preparation of correspondence to Ron Martinez re: complaint served by PERB	0.50 145.00/hr	72.50
	GWH Preparation of answer to PERB complaint	0.80 145.00/hr	116.00
05/04/04	LJ Initial preparation of Summation database to include documents received from Sierra Collège	3.40 65.00/hr	221.00
05/05/04	GWH E-mail from Judy McClymonds re: PERB hearing	0.10 145.00/hr	14.50
05/06/04	GWH Preparation of e-mail to Judy McClymonds re: PERB hearing	0.10 145.00/hr	14.50
05/12/04	GWH Analysis of facsimile from Ron Martinez re: letter from attorney for Maxey (Sam McCall) demanding arbitration	1.10 145.00/hr	159.50
	GWH Conflicts check on attorney Sam McCall (Maxey)	0.10 145.00/hr	14.50
	GWH Telephone call to Ron Martinez re: James Maxey's attorney (Sam McCall)	0.10 145.00/hr	14.50
	GWH Telephone call to Jeanne Leland re: James Maxey arbitration	0.10 145.00/hr	14.50

		<u>Hrs/Rate</u>	<u>Amount</u>
05/12/04	GWH Preparation of correspondence to attorney Sam McCall re: Maxey request for arbitration of grievances, including research re: Article 16 of SCFA contract, joint responsibility for expenses, time line for filing written request for arbitration, verification of timely request	0.70 145.00/hr	101.50
	GWH Telephone call from Jeanne Leland re: Maxey grievance	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Ron Martinez re: Maxey arbitration and selection of arbitrator	0.10 145.00/hr	14.50
	GWH Research re: potential arbitrators for Maxey grievance arbitration	0.50 145.00/hr	72.50
	GWH Review of résumé of attorney Jayson Javitz as potential arbitrator (Maxey)	0.10 145.00/hr	14.50
	GWH E-mail from Ron Martinez re: Maxey arbitration	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Ron Martinez re: arbitrators (Maxey)	0.10 145.00/hr	14.50
	LJ Locate all of Maxey's grievances for use by GWH; locate additional documents for use by GWH re: College's decision and Maxey's request for arbitration	0.60 65.00/hr	39.00
05/13/04	GWH E-mail from Ron Martinez re: Maxey arbitration	0.10 145.00/hr	14.50
05/14/04	GWH Research re: affirmative defenses and preparation of answer to PERB complaint	1.50 145.00/hr	217.50
	LJ Review of District's documents re: allegations in complaint	0.40 65.00/hr	26.00
05/17/04	GWH Preparation of correspondence to Ron Martinez re: answer to unfair practice charge	0.20 145.00/hr	29.00
05/20/04	GWH Telephone call from Ron Martinez and Dolly Green re: personnel file, grievance and PERB hearing	0.10 145.00/hr	14.50
05/24/04	GWH E-mail from Ron Martinez re: Maxey tort claim	0.10 145.00/hr	14.50



		<u>Hrs/Rate</u>	<u>Amount</u>
05/24/04	GWH E-mail from Ron Martinez re: James Maxey tort claim	0.10 145.00/hr	14.50
	GWH E-mail from Pat Vitale re: James Maxey tort claim	0.10 145.00/hr	14.50
	GWH Telephone call to Pat Vitale re: James Maxey tort claim	0.20 145.00/hr	29.00
	GWH Telephone call to Ron Martinez re: informal hearing	0.10 145.00/hr	14.50
	GWH E-mail from Pat Vitale re: Maxey tort claim	0.10 145.00/hr	14.50
	GWH E-mail from Lawrence Lee re: Notice of Action for Maxey tort claim	0.10 145.00/hr	14.50
	GWH E-mail from Lawrence Lee re: Maxey tort claim	0.10 145.00/hr	14.50
	GWH E-mail from Pat Vitale re: proposed tort claim notice for James Maxey claim	0.10 145.00/hr	14.50
	GWH E-mail from Lawrence Lee re: Maxey tort claims agenda description	0.10 145.00/hr	14.50
	GWH E-mail from Lawrence Lee re: James Maxey tort claim and Board agenda	0.10 145.00/hr	14.50
	GWH E-mail from Ron Martinez re: Maxey tort claim	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Lawrence Lee, Ron Martinez and Pat Vitale re: processing James Maxey tort claim	0.10 145.00/hr	14.50
05/25/04	GWH Preparation for and attendance at Informal Hearing, with travel	2.80 145.00/hr	406.00
	GWH E-mail from Pat Vitale re: James Maxey tort claim notice	0.10 145.00/hr	14.50
	GWH E-mail from Lawrence Lee re: Maxey tort claim agenda item	0.10 145.00/hr	14.50
	GWH E-mail from Pat Vitale re: modifications to Maxey tort claims notice	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Pat Vitale and Lawrence Lee re: Maxey notice of late claim	0.10 145.00/hr	14.50

Johnson Sch Viter & Lewis

June 16, 2004

SIERRA COMMUNITY COLLEGE DISTRICT

Page 4

Invoice No. ~~3074~~ 30/35

		<u>Hrs/Rate</u>	<u>Amount</u>
05/26/04	GWH Preparation of Maxey's personnel file summary	0.60 145.00/hr	87.00
	RHJ Set up of database	0.30 145.00/hr	43.50
05/27/04	LRL Review and analysis of background facts	1.50 145.00/hr	217.50
05/28/04	LJ Further preparation of Summation database to include documents received from Sierra College	4.30 65.00/hr	279.50
For professional services rendered		22.20	\$2,523.00

**Additional Charges :**

05/17/04	Mileage to Public Employment Relations Board for filing	1.88
	Parking during filing at Public Employment Board	0.25
05/31/04	Photocopy Charges for this period	4.70
	Total costs	<u>\$6.83</u>

Total amount of this bill	<u>\$2,529.83</u>
Previous balance	\$980.64
<b>Balance due</b>	<u><b>\$3,510.47</b></u>

**Timekeeper Summary**

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
George W. Holt	11.70	145.00	\$1,696.50
Luther R. Lewis	1.50	145.00	\$217.50
Robert H. Johnson	0.30	145.00	\$43.50
Lanee Johnson	8.70	65.00	\$565.50

P.O. 043040

\* *[Signature]*  
OK to pay

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

California Plaza

2180 Harvard Street, Suite 560

Sacramento, CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

PRIVILEGED & CONFIDENTIAL

July 19, 2004

SIERRA COMMUNITY COLLEGE DISTRICT

RON MARTINEZ

5000 ROCKLIN ROAD

ROCKLIN CA 95677

Invoice No.40061

In Reference To: James C. Maxey v. Sierra Joint CCD  
Our file: 04036/GWH

## Interim Statement for Professional Services Rendered

		<u>Hrs/Rate</u>	<u>Amount</u>
06/01/04	LJ Further preparation of Summation database to include documents received from Sierra College	5.10 65.00/hr	331.50
06/02/04	GWH Review of notice of informal hearing re: unfair practice charge	0.10 145.00/hr	14.50
	LJ Further preparation of Summation database to include documents received from Sierra College	0.50 65.00/hr	32.50
	GWH Receipt of Notice of Formal Hearing from PERB	0.10 145.00/hr	14.50
06/03/04	GWH E-mail from Judy McClymonds re: meeting with J. Volek and R. Martinez	0.10 145.00/hr	14.50
	LJ Further preparation of Summation database to include documents received from Sierra College	0.10 65.00/hr	6.50
06/04/04	GWH Preparation of e-mail to Judy McClymonds re: meeting with Ron Martinez and John Volek	0.30 145.00/hr	43.50
	LJ Final preparation of Summation database to include documents received from Sierra College	2.30 65.00/hr	149.50
06/17/04	GWH E-mail from Ron Martinez re: update on James Maxey	0.10 145.00/hr	14.50

	<u>Hrs/Rate</u>	<u>Amount</u>
06/29/04 GWH Review of correspondence from plaintiff's counsel re: would like to proceed with arbitration	0.10 145.00/hr	14.50
06/30/04 GWH Preparation of e-mail to Ron Martinez re: selection of arbitrators	0.10 145.00/hr	14.50
GWH Analysis of selection procedures for arbitrator and preparation of e-mail to attorney Sam McCall with proposed arbitration procedure	0.30 145.00/hr	43.50
GWH Preparation of e-mail to Ron Martinez re: allocation of costs of arbitration	0.10 145.00/hr	14.50
For professional services rendered	9.30	\$708.50

**Additional Charges :**

05/31/04 WestLaw research charges for May 2004	57.43
06/30/04 Photocopy Charges for this period	0.90
Total costs	<u>\$58.33</u>

Total amount of this bill

\$766.83

Previous balance

\$3,510.47

6/16/2004 Payment - Thank You. Check No. 09089076

(\$980.64)

Total payments and adjustments

(\$980.64)

*2003-04 charges*

*P.O. 043090*

*\* [Signature]*  
*OK to pay*

COMMUNITY COLLEGE LEAGUE OF CALIFORNIA  
2017 O STREET  
SACRAMENTO, CA 95814

**ONLINE COLLECTIVE BARGAINING DATABASE  
INVOICE**

TO: Ron Martinez  
Asc Vice President Human Resources  
Sierra Joint CCD  
5000 Rocklin Rd  
Rocklin CA 95677-3397

(10/27/03

Description	Total
California Community College Online Collective Bargaining Database	
Charter subscription through November, 30 2005	\$4,000

Please make check or warrant payable to the Community College League of California  
and send with one copy of this invoice to the address above.



**Center for Collaborative Solutions**

1329 Howe Avenue, Ste. 200

Sacramento, CA 95825

Ph: (916) 567-9911 \* FAX: (916) 567-0776

# Invoice

**BILL TO:**

Sierra Joint CCD  
Attn: Accounts Payable  
5000 Rocklin Road  
Rocklin, CA 95677

DATE	INVOICE #
03/31/04	10221

P.O. #: 042401

ITEM	DESCRIPTION	QTY	RATE	AMOUNT
LMT05	CCS Workshop, provided by Joanne Bodine, two days, March 25 & 26, 2004	1	4800.00	4800.00
	EXPENSES:		0.00	0.00
LMT10	Additional material costs for increase in participants	1	25.00	25.00

**Invoice Total**

**4825.00**

OK to Pay? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Signature <i>[Signature]</i>
Date <u>4-27-04</u>
P.O.# <u>042401</u>

RECEIVED  
APR 26 2004  
COUNTS PAYABLE

Thank You  
**511**

SIERRA JOINT COMMUNITY COLLEGE DISTRICT  
 5000 ROCKLIN ROAD • ROCKLIN, CA 95677  
 PHONE (916) 781-0461 • FAX (916) 789-2669  
 ACCOUNTS PAYABLE (916) 781-0509

**PURCHASE ORDER NO.** 042740

OPERATION GRAND SACRAMENTO  
 1230 J STREET  
 SACRAMENTO CA 95814

S  
H  
I  
P  
T  
O  
 SIERRA COLLEGE  
 SHIPPING AND RECEIVING  
 5000 ROCKLIN ROAD  
 ROCKLIN, CA 95677

ORDER CODE 7194	SITE * Location not on file *	SHIP VIA / F.O.B. N/A	ORDER DATE 03/19/04
ITEM NO. 3480	REQUISITIONED / AUTHORIZED BY M ROBERTS/D SMITH	TERMS NET 30	DATE REQUIRED

PLEASE SUPPLY THE FOLLOWING, SUBJECT TO THE TERMS AND CONDITIONS SET FORTH IN THIS ORDER.

QUANTITY RECEIVED	QUANTITY ORDERED	UNIT	DESCRIPTION	UNIT PRICE	AMOUNT
		FEE	PAYMENT FOR MEETING ROOM UTILIZED BY FACULTY, CLASSIFIED AND DISTRICT BARGAINING TEAMS FOR RETREAT ON MARCH 25 & 26, 2004 TOTAL CHARGE <u>\$2652.10</u> (LESS \$200 DEPOSIT PAID)  REF. PROFORM INVOICE 13/12/04  <i>To repay resolving</i>	2,255.54	2,255.54

*refunded \$347.45 3/30/04*

**THIS MATERIAL WILL NOT BE ACCEPTED UNLESS ACCOMPANIED BY APPROPRIATE MSDS**

	2,255.54
	0.00
<b>TOTAL</b>	<b>2,255.54</b>

*Meg Schneider*  
 AUTHORIZED AGENT

← NOTE: DISTRICT IS RESPONSIBLE ONLY FOR GOODS DELIVERED UPON AN ORDER SIGNED BY THE AUTHORIZED AGENT.

*Melvin Roberts 3-24-04*

00.00.672000.5220.00.31                      2,255.54





*P.O. coming 10/07*  
*Reg. # 333584*  
*to OR to do*  
*or to Purchasing*

**NICOLAY  
CONSULTING**

NICOLAY CONSULTING GROUP  
 Pension Consultants & Actuaries  
 333 Hegenberger Road, Suite 800  
 Oakland, California 94621  
 Tel (510) 567-0610 ♦ Fax (510) 567-0629

TO: Sierra Community College District  
 5000 Rocklin Road  
 Rocklin, California 95677

Date: October 22, 2003

Invoice No.: 343-2003-09

Attn: Mr. Douglas R. Smith  
 Vice President, Finance and Administration

Description of Services	Fees and Expenses
<p>Billing for actuarial and consulting services rendered during September 2003 in connection with the proposed postretirement healthcare program for Sierra College employees hired on, or after, July 1, 1994.</p> <p>These services included the following:</p> <ol style="list-style-type: none"> <li>1. Completion of several open group actuarial valuations for Management, Certificated and Classified employees, using a variety of demographic, plan design and investment earning assumptions.</li> <li>2. Preparation of a September 9, 2003 letter and Exhibits illustrating present value and Fund projections for three eligibility rule and benefit combinations, including estimates of the impact of refunding contributions by employees who leave the District with less than 5 years of service.</li> <li>3. Preparation of a September 18, 2003 letter and Exhibits illustrating present value and Fund projections for seven eligibility rule and benefit combinations, including estimates of the impact of refunding contributions by employees who leave the District with less than 5 years of service.</li> <li>4. Several telephone conversations with District personnel to discuss assumptions and the projections.</li> </ol> <p>Total Amount Due.</p>	<p style="text-align: center;">\$3,800.00</p>
<p><i>Please return the consultant's copy with your remittance at the above address.</i></p>	

*D. Smith*  
*OK to pay*

**NICOLAY  
CONSULTING**

NICOLAY CONSULTING GROUP  
Pension Consultants & Actuaries  
333 Hegenberger Road, Suite 800  
Oakland, California 94621  
Tel (510) 567-0610 ♦ Fax (510) 567-0629

TO: Sierra Community College District  
5000 Rocklin Road  
Rocklin, California 95677

Date: November 11, 2003

Invoice No.: 343-2003-10

Attn: Mr. Douglas R. Smith  
Vice President, Finance and Administration

Description of Services	Fees and Expenses
<p>Billing for actuarial and consulting services rendered during October 2003 in connection with the proposed postretirement healthcare program for Sierra College employees hired on, or after, July 1, 1994.</p> <p>These services included the following:</p> <ol style="list-style-type: none"> <li>1. Completion of additional open group actuarial valuations for Management, Certificated and Classified employees, using a variety of demographic, plan design and investment earning assumptions.</li> <li>2. Preparation of an October 23, 2003 letter and Exhibits illustrating present value and Fund projections for five eligibility rule and benefit combinations, including estimates of the impact of providing a limited benefit to employees who leave the District with less than 5 years of service and a deferred, vested benefit to employees who leave the District prior to retirement, but with 5 or more years of service.</li> <li>3. Telephone conversations with District personnel to discuss assumptions and the projections.</li> <li>4. Participation via conference call in the October 27, 2003 Task Force meeting.</li> </ol> <p><b>Total Amount Due</b></p>	<p style="text-align: center;"><b>\$4,800.00</b></p>
<p>Please return the consultant's copy with your remittance at the above address.</p>	

*P.O. coming  
Reg. # 333586.  
to VR for coding  
11-17-03  
Michele*

*\* [Signature] OK to pay*

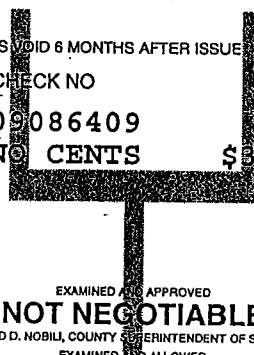
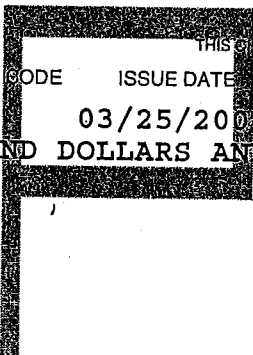
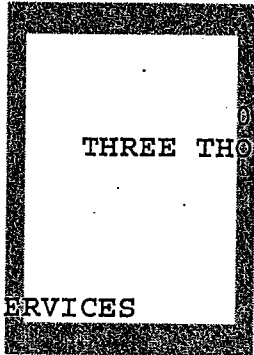
GENERAL SCHOOL FUND

SIERRA COMMUNITY COLLEGE DIST.  
5000 ROCKLIN ROAD  
ROCKLIN CA 95677

PAYABLE TO: BANK OF AMERICA - AUBURN, CA 11-35/1210  
CASURER, COUNTY OF PLACER  
JENINE L. WINDESHAUSEN  
AUBURN, CALIFORNIA

Pay to the order of:

DENNIS O. LEE  
DBA LEE INSURANCE SERVICES  
P.O. BOX 14165  
PINEDALE CA 93650



THIS CHECK IS VOID 6 MONTHS AFTER ISSUE  
FUND CODE 01 ISSUE DATE 03/25/2004 CHECK NO 09086409 AMOUNT \$3,000.00  
THREE THOUSAND DOLLARS AND NO CENTS

EXAMINED AND APPROVED  
**NOT NEGOTIABLE**  
ALFRED D. NOBILI, COUNTY SUPERINTENDENT OF SCHOOLS  
EXAMINED AND ALLOWED  
**NOT NEGOTIABLE**  
KATHERINE J. MARTINIS, COUNTY AUDITOR-CONTROLLER

287221 DENNIS O. LEE 03/25/2004 CHECK NO:09086409

PURCHASE ORDER NO.	MO	DA	YR	INVOICE NUMBER	GROSS AMOUNT	DISCOUNT AMOUNT	NET AMOUNT
PO040135	03	22	04	MAR 04	3,000.00	0.00	3,000.00
*** TOTAL ***					\$3,000.00	\$0.00	\$3,000.00

GENERAL SCHOOL FUND

PAYABLE THRU

BANK OF AMERICA - AUBURN, CA 11-35/1210  
 INSURER, COUNTY OF PLACER  
 JENINE L. WINDESHAUSEN  
 AUBURN, CALIFORNIA

SIERRA COMMUNITY COLLEGE DIST  
 5000 ROCKLIN ROAD  
 ROCKLIN CA 95677

THIS CHECK IS VOID 6 MONTHS AFTER ISSUE

FUND CODE      ISSUE DATE      CHECK NO      AMOUNT

01      04/29/2004      09087591

THREE THOUSAND DOLLARS AND NO CENTS      \$3,000.00

Pay to the order of:

DENNIS O. LEE  
 DBA LEE INSURANCE SERVICES  
 P.O. BOX 14165  
 PINEDALE CA 93650

EXAMINED AND APPROVED  
**NOT NEGOTIABLE**  
 ALFRED D. NOBILI, COUNTY SUPERINTENDENT OF SCHOOLS  
 EXAMINED AND ALLOWED  
**NOT NEGOTIABLE**  
 KATHERINE J. MARTINIS, COUNTY AUDITOR-CONTROLLER

287221 DENNIS O. LEE

04/29/2004

CHECK NO:09087591

PURCHASE ORDER NO.	MO	DA	YR	INVOICE NUMBER	GROSS AMOUNT	DISCOUNT AMOUNT	NET AMOUNT
P004013504	04	22	04	APR 04	3,000.00	0.00	3,000.00
*** TOTAL ***					\$3,000.00	\$0.00	\$3,000.00

Sierra Joint Community College District  
 Collective Bargaining  
 F/Y 2003-2004  
 Schedule 1-A  
 At-Table Negotiations: Classified

Date	Cunningham, Ray	Leland, Jeanne	Martinez, Ron	Smith, Doug
8.6.03		3.50	3.50	3.50
8.27.03		2.50	2.50	2.50
9.3.03		2.00	2.50	1.50
9.10.03		2.50	2.50	2.50
10.28.03		2.50	2.50	2.50
11.5.03		1.00	1.00	1.00
11.19.03		2.80	2.80	2.80
11.24.03		1.80	1.80	1.80
12.1.03		3.00	3.00	3.00
12.3.03		1.50	1.50	1.50
12.17.03		2.50	2.50	2.50
1.14.04		3.00	3.00	3.00
1.15.04		2.50	2.50	2.50
1.16.04		4.00	4.00	4.00
1.21.04		3.50	3.50	3.50
1.24.04		7.00	7.00	7.00
1.28.04		3.50	3.50	3.50
2.4.04		3.50	3.50	3.50
2.11.04		1.50	1.50	0.50
2.25.04		3.50	3.50	3.50
3.3.04		3.50	3.50	1.00
3.10.04			3.50	3.50
3.17.04		3.00	3.00	3.00
3.24.04	3.00	3.00	3.00	3.00
5.12.04		3.50	3.50	3.50
5.19.04		2.00		
6.9.04		3.50		3.50
6.23.04		3.50	3.50	3.00
<b>Totals</b>	<b>3.00</b>	<b>79.60</b>	<b>78.10</b>	<b>76.60</b>

## DISTRICT/FUSE RECOLLECTIONS

Date: August 6, 2003  
Time: 12:00-3:30 PM  
Place: Loomis Chinese

3-5

### FOR THE DISTRICT

John Bukey\*  
Ron Martinez  
Doug Smith  
Jeanne Leland

### FOR THE UNION

Shari Newman\*  
Tim Kyle  
Jory Hadsell  
Bernard Acuna

\*Chief Negotiator

#### 1. Pre and Post-94 Status

Discussion of the Pre and Post-94 side letters. Is there any connection between these two agreements and accessing the Pre-94 unfunded liability fund to pay for Pre-94 retiree benefits?

Pending: If and when withdrawals begin, make the process public

WWW: Jeanne, check JLMC recollections and related side letters, asap

#### 2. Status of JLMC

Identify critical issues and deadlines. Include Dennis Lee for benefits update, and include US Scripts rep for update.

Who are the Post-94 trustees? Should we change the first year trustee selection process from each group appointing one and electing one to appointing both.

Pending: Opting out SCCP.

Who: Jeanne

What: Contact Shana to see if we can change the process

Contact Dennis Daugherty to calculate employee turnover rate

Schedule JLMC meeting for 8/20/03, include US Scripts and Dennis Lee

When: ASAP

#### 3. Formula Status

Develop resolution for last year and this year.

WWW: Jory and Doug will continue to work towards resolution, asap

WWW: Jory and Doug will provide instruction on formula for the teams, asap

#### 4. Release Time

Side Letter 0304-01 was signed to clarify release time agreement for 02-03.

Pending: Release time for 03-04 (currently an element in formula resolution)

**DISTRICT/FUSE RECOLLECTIONS**  
**Confidential**

**Date:** August 27, 2003  
**Time:** 1:30-4:00 PM  
**Place:** Fireside Room

(2-5)

FOR THE DISTRICT

John Bukey  
Ron Martinez\*  
Doug Smith  
Jeanne Leland

FOR THE UNION

Shari Newman\*  
Tim Kyle  
Jory Hadsell  
Bernard Acuna

\*Chief Negotiator

Check-In

**1. Pre and Post-94 Status**

Discussion of the Pre and Post-94 side letters. There is no connection between the Pre and Post-94 side letters. Pre-94 fund withdrawal to commence 7/1/03. Prepare a JLMC letter to be signed by all parties to inform pre-94 employees and retirees that withdrawals will begin.

WWW: Jeanne, prepare a letter for the next JLMC (9/18).

Post-94 update – subcommittee to meet (9/2 at 2:00) to discuss plans to restructure the fund to be sure all participants receive benefits from the Trust.

**2. Status of JLMC**

Regarding the selection of Post-94 trustees, Shana said we can change the selection process of trustees from each group appointing one trustee and electing the other one to appointing both trustees.

*Excerpt from Shana's email to Jeanne dated 8/11/03:*

*Yes, it's no problem for each employee group to appoint both Trustees for the first year, or indefinitely. That is, so long as the Board of Trustees itself is not self-perpetuating, the member organizations could have the power to appoint. However, for political reasons, some clients prefer to election some or all of the Trustees. If you decide on a change, it should be codified in a Trust Agreement amendment. Note Trust Agreement Article XIII, Sec 1, on amendment procedures -- you'll need the official approval of FUSE, SCFA and the College -- not only the Trustees.*

Pending: Identify Post-94 trustees.

Pending: Opting out SCCP

(continued)

**DISTRICT/FUSE RECOLLECTIONS**  
**Confidential**

**Date: September 3, 2003**

**Time: 1:30-4:00 PM**

**Place: Fireside Room**

**FOR THE DISTRICT**

John Bukey

Ron Martinez\* (facilitator)

Doug Smith (left 3:00)

Jeanne Leland (left 3:30)

2-5

1-5

2-0

**FOR THE UNION**

Shari Newman\*

Tim Kyle

Jory Hadsell

Bernard Acuna

\*Chief Negotiator

**Check-In**

**1. Post-94 Update**

Subcommittee (Deb Sutphen, Shari, Jeanne) met to discuss restructuring the Post 94 Trust to ensure all participants receive a benefit. The group is working with Dennis Daugherty, for actuarial data, and Shana Saichek, for legal and Trust structure advice. FUSE would like to ratify on October 3<sup>rd</sup>, so we may need to schedule an earlier JLMC meeting before the 9/18 meeting.

**2. Status of JLMC**

Pending: Identify Post-94 trustees.

Pending: Opting out SCCP.

**3. Academic Calendar (item closed)**

**Mandy Davies (2:00)** described the work currently being done on the academic calendar to change to a modified trimester format (16 week-Fall, 16 week- Spring, and 14 week-Summer). Class start times will be earlier. Class offerings will be MW/TTH changed from MWF/TTH. Currently John Lervold serves on the calendar committee as a classified rep but there is no FUSE rep. Shari stated Sue Keller will represent FUSE. Discussion included: Xmas break to remain the same; instructional day stays the same; no reduction in offerings; change allows the offering of Friday only classes; current 4-unit classes will not change their schedule due to lab classes – Instructional Assistant schedules will not need to change; parking on MWs will have the same impact as TTHs. Spring'04 will test the calendar model and continue to Fall 04 and into 05. The official change will occur in 05-06. There will not be any Friday classes during the summer.

**4. Roseville Gateway Transportation**

Continued discussion regarding International student transportation and other District transportation needs. Do we rent, lease, or buy a vehicle? If the District decides to buy a vehicle, Bernard would like some input into the decision.



**DISTRICT/FUSE RECOLLECTIONS**  
**Confidential**

**Date:** September 10, 2003

**Time:** 1:30-4:00 PM

**Place:** Fireside Room

(2.5)

**FOR THE DISTRICT**

John Bukey

Ron (Martinez)\*

Doug (Smith)

Jeanne (Leland)

**FOR THE UNION**

Shari Newman\*

Tim Kyle

Jory Hadsell (facilitator)

Bernard Acuna

\*Chief Negotiator

Check-In (Doug received his glasses)

**1. Post-94 Update**

Subcommittee plans to meet on Monday morning 9/15 to over the current Post 94 Trust structure and review new actuarial data. An extended JLMC meeting is scheduled for 9/18/03 with the trust attorney, Shana Saicheck, either in person or by phone, to resolve pending issues regarding the trust.

**2. Status of JLMC**

Pre-94 fund withdrawals will commence effective July 1, 2003. A draft memo from JLMC to Pre-94 actives. JLMC retiree reps will prepare a draft memo for the Pre-94 retirees. These memos will be part of the JLMC meeting agenda on 9/18.

Pending: Identify Post-94 trustees.

Pending: Opting out SCCP

**3. Transportation & Bus Drivers**

SCCP format to be used to identify interests and issues. Jeanne located old job descriptions for bus drivers.

WWW: Ron, bring SCCP materials, for next time

**4. Formula Status**

Doug and Jory are working to develop a trigger to measure a fiscal crisis/downturn. One idea is to use a public finding by the Board of Trustees that would include criteria that is yet to be developed.

There is concern regarding equity between units. The concern is that if negotiations include forgiveness of items with one unit, without some sort of return to balance the forgiveness, it would deviate from the purpose of the formula and may render the formula ineffective.

**DISTRICT/FUSE RECOLLECTIONS**  
**Confidential**

Date: **Tuesday, October 28, 2003**

Time: 2:30-5:00 PM

Place: Fireside Room

(2.5)

**FOR THE DISTRICT**

John Bukey

Ron (Martinez)\*

Doug (Smith)

Jeanne (Leland)

**FOR THE UNION**

Shari Newman\* (facilitator)

Bernard Acuna

\*Chief Negotiator

Guests: Sandy Anderson, Joan Basque, Sue Keller-FUSE Executive Board

**Check-In** - Shari reported that she invited the FUSE Executive Board members to sit in on negotiations until new negotiators are named. FUSE will be sending out an email to their membership requesting negotiator nominations. The FUSE Executive Board will review nominations and select new negotiators.

Confidential discussion continued regarding compensation agreements.

We did not review recollections from October 23, 2003

Following from 10/23/03 recollections:

Agreement to review ground rules and add a confidentiality check-out to meeting process.

**Consensus** – The District agrees to go to the Board to seek an increase in the FUSE medical benefits cap.

Agreement to issue a joint communiqué stating the Union and the District have reconvened negotiations and a tentative agreement was reached to increase the medical benefit cap to \$700.00. Negotiations are on-going.

**Consensus** – District and the Union agree to work toward implementing a compensation formula similar to the Los Rios model beginning in the 2004-2005 school year.

The work toward implementing a Los Rios model compensation formula will be a joint effort with the FUSE, SCFA, and the District.

Discussion to participate in interest-based retraining on a regular basis for negotiating teams.

**DISTRICT/FUSE RECOLLECTIONS**  
**Confidential**

Date: **Wednesday, November 5, 2003**

Time: 2:00-3:00 PM

Place: Fireside Room

(1.0)

**FOR THE DISTRICT**

John Bukey

Ron Martinez\*(facilitator)

Doug Smith

Jeanne Leland

**FOR THE UNION**

Shari Newman\*

Bernard Acuna

\*Chief Negotiator

Guests: Sandy Anderson, Sue Keller-FUSE Executive Board

**Check-In** - Elephants were discussed. Confidential discussion continued regarding compensation agreements. This discussion included the possibility of facilitated negotiations with a mutually agreed upon facilitator. Our ground rules to be part of facilitated meeting. Ground rules have not been reviewed or renewed for several years. WWW: FUSE, to discuss facilitated negotiations and facilitators with their Executive board, report back within a week (Shari will email District)

**1. Post-94 Update**

Post 94 Subcommittee to present recommendation to JLMC today.

WWW: Jeanne, set up an information session at NCC with Shari, Deb, let Shari know.

**2. Status of JLMC (item closed)**

**3. Transportation & Bus Drivers (pending)**

Began SCCP format to identify interests and issues. Further discussion is pending. Ron requested a meeting with Bernard and Jesus on 11/7 with Dolly Green. Bernard will check availability.

WWW: Jeanne, locate old job descriptions for bus drivers, for next meeting

**4. Formula Status**

Tentative agreement to increase medical cap to \$700.00 is part of the Board of Trustees Closed Session meeting on November 11. The group discussed interest-based retraining for negotiating teams in the spring in formal CFIER training. Clarification was requested regarding side letter agreement 0304-02, item 10 - "Union and the District agree to keep the compensation formulas in place through 2005-2006." "Compensation formulas" refers to the current formula. If, as a result of developing a Los Rios model formula, the Los Rios model formula would be considered a "new" formula.

**DISTRICT/FUSE RECOLLECTIONS**  
**Confidential**

Date: **Wednesday, November 19, 2003**

Time: 2:00-4:45 PM

Place: Fireside Room

(2.8)

**FOR THE DISTRICT**

John Bukey (facilitator)

Ron Martinez\*

Doug Smith

Jeanne Leland

**FOR THE UNION**

Shari Newman\*

Bernard Acuna

Carolyn Warner

Gerri Snell

\*Chief Negotiator

Guests: Joan Basque-FUSE Executive Board

**Check-In** – Shari introduced her new negotiation team members Carolyn Warner and Gerri Snell. Joan Basque will be filling in for Bernard who will be on vacation during December. FUSE will be going out for another team member. Shari informed the group of the FUSE general meeting to be held tomorrow afternoon.

The group discussed the possibility of having an outside facilitator to work through current issues.

WWW: Shari, ask E-Board to approve of outside facilitator at Thursday's general meeting, report back to District on Friday, 11/21/03.

Tentative schedule for future meetings:

11/24/03      1:00-3:00      (John, after 1:30)

12/8/03      9:00-12:00

12/10/03      1:30-5:00      (no John)

12/12/03      1:30-5:00      (John uncertain)

12/15/03      1:30-5:00

12/17/03      2:00-5:00

We will continue with negotiations whether or not an outside facilitator is agreed upon. Alternative: if FUSE E-Board does not agreed to an outside facilitator, we will go with John and Joan for facilitation.

The group discussed the ground rules from August 2001. Further discussion of quorum rule pending.

WWW: Jeanne, make revisions to all but #10, for next time.

**DISTRICT/FUSE RECOLLECTIONS**

**Confidential**

1.8

Date: **Monday, November 24, 2003**

Time: 1:00-2:50 PM

Place: Community Education Conference Room A-16

**FOR THE DISTRICT**

John Bukey  
Ron Martinez\*  
Doug Smith  
Jeanne Leland

**FOR THE UNION**

Shari Newman\*  
Bernard Acuna  
Carolyn Warner  
Gerri Snell

\*Chief Negotiator

Guests: Adele Hamlett, facilitator, Joan Basque-FUSE Executive Board

Today's meeting was held using the SCCP process and facilitated by Adele Hamlett. We will need to check in with Adele regarding future schedule.

Issues discussed: Ground Rules  
See separate sheet listing issues, interests and options.

Meeting Dates agree to:

12/1/03 9:00-12:00

12/10/03 1:30-5:00 (no John)

At the 12/10/03, the group agreed to review schedule for future meetings at this time.

12/12/03 1:30-5:00 (John uncertain)

Tentative schedule to be confirmed on 12/10/03: (Adele not available to facilitate)

12/15/03 1:30-5:00

12/17/03 2:00-5:00

At our last meeting on 11/19/03, the group agreed to use Joan and John as alternate facilitators should Adele be unavailable. The District informed the group that John's participation as SCCP participant is critical. This alternate facilitation would not be an option.

**DISTRICT/FUSE RECOLLECTIONS**  
**Confidential**

Date: **Monday, December 1, 2003**

Time: 9:00 AM-12:00 PM

Place: Community Education Conference Room A-16

3.0

**FOR THE DISTRICT**

John Bukey

Ron Martinez\*

Doug Smith

Jeanne Leland

**FOR THE UNION**

Shari Newman\*

Bernard Acuna

Carolyn Warner

Gerri Snell (absent)

\*Chief Negotiator

Guests: Adele Hamlett, facilitator, Joan Basque-FUSE Executive Board

Today was our second session using the SCCP process. Adele Hamlett provided facilitation.

Check-In

Elephants discussed.

We agreed to handle off-agenda items as a group by topic and establishing interests to see if it can be done at the table or handled off-line. We agreed to discuss off-agenda items before the end of today's meeting.

Ground rules and recollections from 12/1/03 meeting provided by email prior today's meeting and as handouts today. Recollections included meeting dates.

**ISSUE #1**

1. FUSE worked within the bucket dollars. SCFA did not stay within the dollars. FUSE used rules. SCFA and District did not.
2. Formulas are different for PERS and STRS.
3. Didn't calculate the dollars or numbers out to 2003-2004 for classified. Formulas were not formalized.
4. How much discretion with formula?
5. Calculations for FUSE bucket were done by a subgroup. Made it difficult for rest of team to be informed of bucket and caused distrust
6. Complexity of formula
7. Current formulas don't guarantee parity
8. Entitlement to parity
9. Urgency (time line) felt by FUSE
10. Lack of understanding of formula (by FUSE)
11. What is parity

**DISTRICT/FUSE RECOLLECTIONS  
CONFIDENTIAL**

Date: **Wednesday, December 3, 2003** (1.5)  
Time: 12:00 – 1:30 PM  
Place: Community Education Conference Room A-16

**FOR THE DISTRICT**

John Bukey (co-facilitator)  
Ron (Martinez)\*  
Doug (Smith)  
Jeanne (Leland)

**FOR THE UNION**

Shari Newman\*  
Bernard Acuna (absent)  
Carolyn Warner  
Gerri Snell

\*Chief Negotiator

Guests: Joan Basque-FUSE Executive Board, sub for Bernard, and co-facilitator for today's meeting.

Today was our third session using the SCCP process. John Bukey and Joan Basque provided facilitation. The purpose of today's meeting is to discuss future facilitation.

- Check-In – It was reported that Adele would be available to facilitate meetings on December 10, 12, and 15<sup>th</sup>. She will not be available on the 17<sup>th</sup>.
- Review of recollections from 12/1/03.  
Off-Agenda item from 12/1/03 – Contracting Out – Bus Drivers – The District requested FUSE to approve prepared contracting out paperwork to continue with current bus driver arrangement until a time the issue can be renegotiated.

Shari reported that she was out ill and will take the contracting out request to transportation for steward sign-off. She will bring the paperwork to Ron's office today.

**FACILITATION DISCUSSION:**

**ISSUE**

Need to identify one or more facilitators to work with negotiations group to resolve immediate issues.

**Consensus reached.**

**DISTRICT/FUSE RECOLLECTIONS**  
**Confidential**

(2.5)

Date: **December 17, 2003**  
Time: 2:30-5:00 PM  
Place: Community Education Conference Room A-16

**FOR THE DISTRICT**

John Bukey  
Ron (Martinez)  
Doug (Smith)  
Jeanne (Leland)

**FOR THE UNION**

Shari Newman\*  
Bernard Acuna (absent)  
Carolyn Warner  
Geri Snell  
Joan Basque (sub for Bernard)

\*Chief Negotiator  
Facilitator: Eunis Benecke  
Today was our 6th session using the SCCP process.

- **Check-In**
- **Off-Agenda Items**

**A&R Technician II (RG)** – Shari reported a payroll issue for this employee. He's been paid incorrectly since his hire date. He is currently the only A&R Tech at RG.  
WWW: Ron, Shari, and Jeanne, research and report back, for next time.

**5<sup>th</sup> formula discussion –**

As agreed the group met today with Eunis as sole facilitator, to continue with the presentation of formula specifics.

Doug provided the following handouts:

- A corrected version of 2002-2003 side by side SCFA/FUSE formula analysis dated 12/15/03 (green sheet).
- A side by side SCFA/FSUE formula analysis comparison – before settlements dated 12/16/03 (draft).
- A side by side SCFA/FUSE formula totals vs. settlement terms (draft).

Doug reviewed and explained the documents and provided a Q&A. The group agreed that if additional questions or information is needed, these will be presented to the group. The purpose is to avoid side bar meetings and any potential for miscommunication and mistrust. Questions and information requests will be given to Doug prior to the meeting in order that he may locate/prep the requested information.

Tentative meeting dates for negotiations:

Jan. 14, 1:30-5:00  
Jan. 15, 3:00-6:00  
Jan. 16, 9:00-1:00  
Jan. 21, 1:30-5:00



**DISTRICT/FUSE RECOLLECTIONS**  
**Confidential**

Date: **January 14, 2004**

Time: 1:30-4:30 PM

Place: Community Education Conference Room A-16

(3.0)

**FOR THE DISTRICT**

John Bukey

Ron (Martinez)\*

Doug (Smith)

Jeanne (Leland)

**FOR THE UNION**

Shari Newman\*

Bernard Acuna

Carolyn Warner

Geri Snell

Jennifer Dupuis (1<sup>st</sup> mtg)

\*Chief Negotiator

Facilitators: Jo Sumner and Eunis Benecke

Today was our 7th session using the SCCP process.

• **Check-In**

Jennifer Dupuis, Payroll Technician joined the FUSE negotiating team today.

The group agreed to use tables for today only on a trial basis.

The group discussed ways to begin again after the winter break to familiarize ourselves with where we left off. Carolyn provided a handout of analysis work done with John Lervold of the SCFA/FUSE 2003-2004 side by side. The result was that FUSE feels that after reviewing all the data provided at earlier sessions by District, that SCFA got more than FUSE is the formula resolutions.

After a caucus District will review the analysis handout and discussion turned to outstanding items regarding re-opener. It was agreed that Jo and Eunis would list and categorize the options, issues, interests from prior recollections.

WWW: Jeanne, email recollections to Jo, tonight

Discussion moved to clarifying issues. We began by reviewing recollections from 12/10&12/03 recollections and assigned issues by prior discussion topics.

\*\*Compensation

**ISSUES**

\*\*Compensation

- |     |  |
|-----|--|
| I   | Contracting Out (1-6, 16)                              |
| II  | Vacancy Replacement (7, 8, 16)                         |
| III | Temps (11, 12, 16)                                     |
| IV  | Renegotiating Article 10 (Hours and Overtime) (13, 14) |
| V   | Hiring Process (8, 9, 10,15)                           |

## DISTRICT/FUSE RECOLLECTIONS

Confidential

Date: Thursday, January 15, 2004

Time: 4:00-6:30 PM

Place: Community Education Conference Room A-16

2.5

### FOR THE DISTRICT

John Bukey

Ron Martínez\*

Doug Smith

Jeanne Leland

### FOR THE UNION

Shari Newman\*

Bernard Acuna

Carolyn Warner

Geri Snell

Jennifer Dupuis

\*Chief Negotiator

Facilitators: Jo Sumner and Eunis Benecke

Today was our 8th session using the SCCP process.

### • Check-In

The group agreed to spend about 50 minutes on Article 10. At 10:00 we will check-in to discuss how to proceed and make time for off-agenda items.

#### CONSENSUS

45-50 minutes to this then check-in to see what to do next.

It was decided that the group would address compensation/parity issue and work on how to communicate with FUSE membership.

Discussion began with Article 10, Call Back/On Call. Ron provided copies of **on-call/stand-by** procedures used by Grossmont-Cuyamaca Community College. The group read the procedures aloud and discussed "voluntary" on-call. The handout was used as a beginning point of discussion.

### INTERESTS

DISTRICT	FUSE
Schedule of obligation/rotation	Schedule of obligation/rotation
Being able to have more people on call	Being able to have more people on call
	Develop a pool/reasonable number for call back in small areas.
District cell phones	District cell phones
Identify areas	Identify areas
	Define stand-by
	Process/protocol/implementation
Employee buy-in	Employee buy-in
Make it simple to get someone back quickly when needed	Make it simple to get someone back quickly when needed
Adequate compensation	Adequate compensation

## DISTRICT/FUSE RECOLLECTIONS

Confidential

Date: Friday, January 16, 2004

Time: 9:00-1:00 PM

Place: Community Education Conference Room A-16

4.0

### FOR THE DISTRICT

John Bukey

Ron Martinez\*

Doug Smith

Jeanne Leland

### FOR THE UNION

Shari Newman\*

Bernard Acuna

Carolyn Warner

Geri Snell

Jennifer Dupuis

\*Chief Negotiator

Facilitators: Jo Sumner and Eunis Benecke

Today was our 9th session using the SCCP process.

#### • Check-In

Discussion continued with Article 10, Call Back/On Call

Bernard reported out regarding on his discussion with staff regarding on-call for Transportation:

Transportation Department Input

- Flexible
- Simple
- Cal Cards
- Pay would be problem
- 8 hour blocks
- How to deal with charters/rentals?
- Cell phones to all
- Not include Management

#### Transportation Options

1. a. Rotation process be implemented with three classified in pool.
- b. Manager decides need for on-call status consistent with GC model based on mutually agreed upon criteria to be developed before rotation process begins.
- c. Cal cards and telephones be issued permanently to those on rotation with appropriate limits on cal card.
- d. Emergency protocol/criteria to notify management.
- e. Establish reasonable time/compensation block
- f. charters/rentals would be responsibility of carrier and defined in protocols

**CONSENSUS ON THE ABOVE OPTIONS**

**DISTRICT/FUSE RECOLLECTIONS**  
**Confidential**

Date: **Wednesday, January 21, 2004**

Time: 1:30-5:00 PM

Place: Community Education Conference Room A-16

35

**FOR THE DISTRICT**

John Bukey (absent)

Ron Martinez\*

Doug Smith

Jeanne Leland

**FOR THE UNION**

Shari Newman\*

Bernard Acuna

Carolyn Warner

Geri Snell

Jennifer Dupuis

\*Chief Negotiator

Facilitators: Jo Sumner and Eunis Benecke

Today was our 10th session using the SCCP process.

- **Check-In**
- Review of Recollections  
Clarification requested on the transportation on-call/standby side letter. Side letter for plant operations will be developed in order for simultaneous implementation. Clarification is to be noted in the 1/16/04 recollections.

Corrections to 1/14/04 recollections: strike the word formula from the phrase "...than FUSE in the formula resolutions.

WWW: Jeanne, make corrections to file copy, asap.

- Ron stated that due to On-Call/Standby discussion, Ron spoke to Mandy regarding a process for IIT. They will work towards a conceptual plan. Ron did not discuss compensation.

Outstanding issues: vacancy replacement, temps, hiring process, compensation. Doug began discussion of compensation comparison. We discussed various approaches. Do we ask Doug to true up the numbers for actuals or develop options? The group agreed to work on options.

**OPTIONS (continued from previous meetings)**

- 67. 2.5% off schedule
- 68. .5% on schedule
- 69. Birth and adoption leave
- 70. Flat bonus – fixed amount per employee
- 71. 1% on schedule
- 72. #67, 68, 69 – Discount schedule for on schedule \$ amount off – all weighed against what already received
- 73. Share the portion of fund balance 8% like SCFA

**DISTRICT/FUSE RECOLLECTIONS - Confidential**

Date: **Saturday, January 24, 2004**

Time: 9:00 AM-4:00 PM

Place: Community Education Conference Room A-16

7.0

**FOR THE DISTRICT**

John Bukey (absent)  
Ron Martinez\*  
Doug Smith  
Jeanne Leland

**FOR THE UNION**

Shari Newman\*  
Bernard Acuna  
Carolyn Warner  
Geri Snell  
Jennifer Dupuis

\*Chief Negotiator

Facilitators: Jo Sumner and Eunis Benecke

Today was our 11th session using the SCCP process.

- **Check-In**
- **Recollections** from 1/21/04 reviewed and approved

**Off-Agenda**

**RG Shuttle Bus Driver/Custodian Job description**

Adding courier duties. Concern regarding safety, timing of the runs and logistics concerns. The new bus does not have storage for mail tubs and other materials. District stated that safety is the number one concern. Not for exclusive delivery beyond reasonable amounts. FUSE stated that students/passengers should not be used to carry or distribute mail. If courier services needed, the driver should not be required to deliver the mail. The driver should have one drop off site to be determined.

Today's session began with a first look at the Vacancy Replacement, Article 29, page 234

**VACANCY REPLACEMENT ISSUES**

- When do we cut off the internal transfers/promotions
- Applicant needs to have qualification
- How article has been applied is inconsistent

**INTERESTS**

District	FUSE
Applicant must meet MQs to submit interest card	Overall process for internal process has been beneficial
Not have a FT employee go to a temp position (leave replacement)	Expedite hiring process
Language that is simple and understanding with consistent practice	
Training	

**DISTRICT/FUSE RECOLLECTIONS - Confidential**

Date: **Wednesday January 28, 2004**

Time: 1:30-5:00 PM

Place: Community Education Conference Room A-16

(3.5)

**FOR THE DISTRICT**

John Bukey (absent)

Ron (Martinez\*)

Doug (Smith)

Jeanne (Leland)

**FOR THE UNION**

Shari Newman\*

Bernard Acuna

Carolyn Warner

Geri Snell

Jennifer Dupuis

\*Chief Negotiator

Facilitators: Jo Sumner and Eunis Benecke

Today was our 12th session using the SCCP process.

- **Check-In**
- **Recollections** from 1/24/04 reviewed. Consensus to remove the wording on page 4 "The 34 positions are erased". Add the agenda Future faculty hires vs. classified.

**Contracting Out, Article 31**

Add to contracting out language under Section 1, Category A – no consultation with bargaining unit required.

**Contracting Out Form**

Category A: Tracking only

Take form to constituent group for review and report back in Feb.

**Contract Rewrite**

Appendix section in the back of contract entitled FORMS – decide later

**Standby/On Call**

Identify midweek holidays and apply across the board.

Block holidays (i.e. Christmas break)

WWW: Ron, check in with Ray and Henry to determine holiday blocks, for Feb. 4.

WWW: Ron, use IIT framework for Plant Ops with Ray and Bernard, for Feb. 4

**Side letter draft**

We reviewed draft and made some edits

WWW: Jeanne, revise side letter for next time

**All WWWs regarding outstanding contract issues, forms, and side letter due on Feb 4.**

**DISTRICT/FUSE RECOLLECTIONS - Confidential**

Date: **Wednesday, February 4, 2004**

Time: 1:30-5:00 PM

Place: Community Education Conference Room A-16

3.5

**FOR THE DISTRICT**

John Bukey (absent)

Ron (Martinez)

Doug (Smith)

Jeanne (Leland)

**FOR THE UNION**

Shari Newman\* (absent)

Bernard Acuna

Carolyn Warner

Geri Snell

Jennifer Dupuis

\*Chief Negotiator

Facilitators: Jo Sumner and Eunis Benecke

Today was our 13th session using the SCCP process.

- **Check-In**
- **Recollections** – we reviewed as a group for today's agenda

**Off-Agenda**

Bernard provided the District with a copy of a letter from Jory Hadsell dated 1/27/04 addressed to FUSE regarding his notification of resignation from the union. The letter addressed to FUSE had a cc to the District.

**Contracting Out (Article 31)**

Revised copies were provided. The group reached **consensus** to accept the contract language.

**Contracting Out Form**

Revised copies were provided. The group agreed to remove "student help" from the form and reached **consensus** to accept the form.

**Contract Rewrite**

Appendix section in the back of contract entitled FORMS – decide later – agreed to move this to the parking lot

**Standby/On Call (Article 10)**

Ron reviewed the draft language with the group. Each unit will develop their own protocols working with their staff. Protocols will come to the table for review and consensus. The group discussed several edits. We reached **consensus** to accept the draft language with edits.

**Side letter draft**

Revised side letter was reviewed. The group reached **consensus** to accept the side letter.

**DISTRICT/FUSE RECOLLECTIONS - Confidential**

Date: **Wednesday, February 11, 2004**

Time: 1:30-3:00 PM

Place: Community Education Conference Room A-16

(1.5)

**FOR THE DISTRICT**

John Bukey

Ron (Martinez)

Doug (Smith) (2:00) - (0.5)

Jeanne (Leland)

**FOR THE UNION**

Shari Newman\* (absent)

Bernard Acuna

Carolyn Warner

Geri Snell

Jennifer Dupuis

\*Chief Negotiator

Facilitators: Jo Sumner

Today was our 14th session using the SCCP process.

• **Check-In**

**Off-Agenda**

Bilingual stipend – information item that the bilingual stipend will be reassigned to another classified employee.

Bus driver/custodian – Ron asked to be able to advertise concurrently with in house recruitment due to time constraints – consensus.

SCCP training retreat and sharing costs

Estimated share for FUSE would be \$2,500:00. FUSE team will need to check with their Executive board for approval to spend funds.

• **Reports**

1. FUSE to vote on February 24 for ratification

2. Board of Trustees approved package in concept

3. Los Rios – Concept to modify existing formula or develop new formula.

4. IUNA pension fund – question on taxable portion – how does district pay?

Check with Joyce Lopes, include Jennifer and Shari in the discussion.  
Substantiate what we are currently doing.

**Side letter 0304-05**

**consensus**

Side Letter 0304-05 Clarification –



## DISTRICT/FUSE RECOLLECTIONS

Date: **Wednesday, February 25, 2004**

Time: 1:30-5:00 PM

Place: Fireside Room

3.5

### FOR THE DISTRICT

John Bukey

Ron Martinez\*

Doug Smith

Jeanne Leland

### FOR THE UNION

Shari Newman\*

Bernard Acuna

Carolyn Warner

Geri Snell

Jennifer Dupuis (absent)

\*Chief Negotiator

Facilitator: Jo Sumner

### • **Check-In**

Jo will be out the next two Wednesdays

### Off-Agenda

#### 1. Retreat Training Costs

Shari reported that the FUSE E-board was concerned with the expense (\$2,500). SCFA and Management are each paying their share of the costs. Shari will let us know after their March 2<sup>nd</sup> E-board meeting. The group discussed the symbolic importance as the three groups move forward toward a new formula and other interests. The group discussed adding a FUSE rep to the retreat planning group. Geri volunteered to work with Deb Sutphen and Jeanne.

#### 2. Email for FUSE membership

Currently not all classified employees are members of FUSE though they must pay the agency fee. FUSE has an interest in developing an email list for their members only.

WWW: District, find out how SCFA handles their list, for 3/3/04

#### 3. Classified Calendar

The group reviewed the classified calendar for 2004-2005.

WWW: Shari will revise draft and show to Susan McVay and Mandy Davies, bring back to table. Calendar group will need to begin working on the 2005-2006 calendar.

#### 4. FUSE Ratification

FUSE membership ratified the tentative agreement by a vote of 121 to 1. The agreement included side letter 0304-05 along with the revisions to articles 2, 10, 29, and 31.

## DISTRICT/FUSE RECOLLECTIONS

Date: **Wednesday, March 3, 2004**

Time: 1:30-5:00 PM

Place: Fireside Room

(3.5)

### FOR THE DISTRICT

John Bukey

Ron (Martinez\*)

Doug (Smith) (out 1 hour) (1.0)

Jeanne (Leland)

### FOR THE UNION

Shari Newman\*

Bernard Acuna

Carolyn Warner

Geri Snell

Jennifer Dupuis (absent)

\*Chief Negotiator

Facilitator: Eunis Benecke

### • Check-In

### Off-Agenda

#### 1. Future Staffing Concerns

FUSE asked about staffing the additional portables and "Swale" Hall. District described the PAR process as the means to adding both teaching and support staff.

#### 2. Retreat Training Costs

Shari reported that the FUSE E-board approved the \$2,500 but not unanimously. Jennifer may not be attending, can they add Sue Keller and Joan Basque. FUSE participants would be six instead of 5. Also if this activity falls under mandated costs, FUSE would like to recoup that cost as well. Mandated cost recovery is currently suspended.

WWW: Jeanne, check contract and list participants, report back.

WWW: Geri, work with team to establish FUSE retreat goals, for subcommittee (Jeanne and Deb) conference call with facilitator to be scheduled.

#### 3. Email for FUSE membership (item closed)

Currently not all classified employees are members of FUSE though they must pay the agency fee. FUSE has an interest in developing an email list for their members only.

WWW: Eunis, work with Shari off-line

#### 4. Classified Calendar

Shari provided three handouts/options for the 04-05 classified calendar. Both Mandy and Susan McVay have reviewed the calendar options. Calendar options will go to vote, asap, next week.

#### 5. FUSE Ratification (item closed)

FUSE membership ratified the tentative agreement by a vote of 121 to 1. The

## DISTRICT/FUSE RECOLLECTIONS

Date: **Wednesday, March 10, 2004**

Time: 1:30-5:00 PM

Place: Fireside Room

(35)

### FOR THE DISTRICT

John Bukey (facilitator & recorder)

Ron Martinez\*

Doug Smith

Jeanne Leland (absent)

\*Chief Negotiator

Facilitator: Eunis Benecke

### FOR THE UNION

Shari Newman\* (absent)

Bernard Acuna

Carolyn Warner

Geri Snell

Jennifer Dupuis (absent)

Sue Keller

### • Check-In

### Off Agenda Item

#### Standby Protocols

Doug reported on HVAC and maintenance meeting at 9:00-10:00 today (3/10/04).

Seems that there was agreement to complete protocols as soon as possible.

WWW: Bernie, contact Ray, back to table for approval, asap.

WWW: Ron, IIT protocols, asap.

1. **Future Staffing Concerns** (item closed)  
FUSE asked about staffing the additional portables and "Swale" Hall. District described the PAR process as the means to adding both teaching and support staff.
2. **Retreat Training Costs**  
Jennifer will not be attending, FUSE may add Sue Keller and Joan Basque.  
Additional cost to increase from 17 to 18 participants is \$25.00  
Gen. Jeanne and Deb have a conference call scheduled on 3/16/04 with facilitator Neal Vodine.
3. **Classified Calendar**  
Calendar to be re-sent. There is a question regarding the number of days on the previous calendar options handed out last week.
4. **Implementation of Agreement**
  - (a) **Standby Protocols**  
Consensus to accept the protocols for transportation as presented. These will be reviewed by 6/30/04.  
WWW: Jeanne, linking standby tracking to payroll (add another line to time sheets?), asap

## DISTRICT/FUSE RECOLLECTIONS

Date: **Wednesday, March 17, 2004**

Time: 1:30-4:30

Place: Fireside Room

(3.0)

### FOR THE DISTRICT

John Bukey

Ron (Martinez)

Doug (Smith)

Jeanne (Leland)

### FOR THE UNION

Shari Newman\*

Bernard Acuna (absent)

Carolyn Warner

Geri Snell

Sue Keller

\*Chief Negotiator

Facilitator: Jo Sumner

### • Check-In

### Off Agenda Item

#### 1. IIT

Shari reported rumor that Henry is bringing in an outside facilitator.

www: Ron and Shari, investigate and report back, asap.

Shari reported a rumor that Henry plans to change shifts of three IT classified staff to begin on Saturday evenings.

www: Ron, investigate and report back, asap

#### 2. Financial Aid Temps

Shari is asking about the status of these temporary employees. Ron reported that Mandy would like these positions to continue as temps because the funding is still uncertain.

www: Shari, Ron, Mandy, meet and confer, asap

#### 3. Plant Ops Retiree

Shari reported concerns regarding a retiree's return to work provision. The retiree is reported to be repeatedly absent and unable to keep the work schedule agreement.

www: Ron, to meet with retiree, Shari, and supervisor to discuss, asap

#### 4. Gateway Library

Reportedly staffed by students.

www: Ron, investigate w/Brian Haley, asap

#### 5. Substitute Temp Employees

Status quo for two subs now with unit working with employee. What rate do we pay substitutes in a career ladder position? In the future, substitutes will be paid at the I level, A step of the career ladder not II or III. **Consensus** - New hires will be dealt with on a case-by-case basis at the table when effected by ladders.

## DISTRICT/FUSE RECOLLECTIONS

Date: **Wednesday, March 24, 2004**

Time: 1:30-4:30

Place: Fireside Room

(3.0)

### FOR THE DISTRICT

John Bukey

Ron Martinez\*

Doug Smith

Jeanne Leland

### FOR THE UNION

Shari Newman\*

Bernard Acuna

Carolyn Warner

Geri Snell

Sue Keller

\*Chief Negotiator

Facilitator: Jo Sumner

Guests: Amanda Langley, Ray Cunningham, Dan Brown (2:00-2:20)

### • Check-In

### Off Agenda Item

1. **Special Event Drivers – reopened**  
Issue – the hourly rate of pay for temps compared to the new Driver/Custodian.  
WWW: Jeanne, research how temp pay is determined.
2. **Standby**  
Nonwork or closure days as they relate to standby – are these considered holidays, to be handled as holidays? What about winter and spring breaks? Are these to be included in the standby schedule?  
WWW: Ron, check with managers regarding the amount of holiday activity, asap.
3. **4/10s**  
WWW: Jeanne, research the four hour Staff Development/flex day, asap  
WWW: Ron, send a notice to staff regarding this year's 4/10 schedule, asap  
WWW: Ron and Doug, explore district interests with regard to offering/continuing furloughs, for next time.
4. **IBB Retreat**  
There was some concern that the faculty outcomes may be different than what classified group expected/understood as the intent of the retreat. The intent is not to fix the income formula. The facilitator is setting the agenda based on comments from the retreat subcommittee as previously agreed.
5. **Post '94**  
Contribution implementation is expected to begin April 30<sup>th</sup>.

**DISTRICT/FUSE RECOLLECTIONS**

Date: **Wednesday, May 12, 2004**  
 Time: 1:30-5:00  
 Place: Community Education A-16

3.5

**FOR THE DISTRICT**

John Bukey  
 Ron Martinez\*  
 Doug Smith  
 Jeanne Leland

**FOR THE UNION**

Shari Newman\*  
 Bernard Acuna  
 Carolyn Warner  
 Gerri Snell (left at 3:00)  
 Sue Keller (absent)

\*Chief Negotiator  
 Facilitator: Joanne Bodine

• **Check-In**

Joanne Bodine facilitated a meeting earlier in the day with several members from District and FUSE teams to work on identifying an issue that surfaced during the two day retreat in Sacramento on March 25<sup>th</sup> and 26<sup>th</sup>. Those individuals involved in the today's earlier discussion agreed to bring their work back to the District/FUSE group for continued input, discussion, and possible resolution.

Groundrules

1. Assume the best intentions
2. Respectful and open
3. Honesty
4. One person at a time
5. Cell phones off/stun
6. Positive rather than accusatory
7. Attack the issue, not the person
8. Confidentiality... what's said here stays here (what we say about each other).

Plus	Delta
Joanne = +	Sue gone
Did it	Done it sooner
Started talking	
Everybody honest	
Finally together	

**Consensus**

Shari and Jeanne to produce a joint communiqué regarding 4/10 schedule and to work offline to discuss furloughs.

WWW: Shari, develop three furlough payroll options and Joyce to review, asap.

The group agreed that since Doug and Ron would not be available on 5/19/04, John and Jeanne will represent the district for regularly scheduled negotiations.

## DISTRICT/FUSE RECOLLECTIONS

Date: **Wednesday, May 19, 2004**

Time: 1:30-3:30

Place: Fireside Room

2.0

### FOR THE DISTRICT

John Bukey

Ron Martinez\* (absent)

Doug Smith (absent)

Jeanne Leland

### FOR THE UNION

Shari Newman\*

Bernard Acuna

Carolyn Warner

Gerri Snell

Sue Keller

\*Chief Negotiator

Facilitator: John Bukey

### • Check-In

Several revisions to the May 12, 2004 recollections were requested.

WWW: Jeanne, make requested revisions and resend, asap

### Summer Schedule

Shari and Jeanne reported that a memo to all staff went out yesterday regarding the 2004 summer 4/10 work schedule.

### Career Ladders

Side letter 0304-06 (unsigned) was discussed and changes requested. Concerns on how to handle level I positions (6) hired with career ladder language. After reviewing the ladder language it was agreed that only two positions need to be addressed. The Union agreed that ladders should be suspended.

WWW: Jeanne, discuss options with Ron and revise side letter, for next time.

### Conversion

Jeanne handed conversion packets containing conversion documentation. Shari stated she will be discussing conversion status in a general membership meeting this Friday.

WWW: Teams, review conversion packet for discussion, for next time

WWW: Jeanne, meet with Ron to develop a conversion plan and timeline, for next time

### Post 94 Contract Language

Joyce is reviewing draft language developed by John and Shana.

WWW: Jeanne, when draft language is finalized, distribute asap

### Summer Furlough

Shari submitted three options for payroll and Joyce Lopes to review. Payroll submitted a 4<sup>th</sup> option for consideration. The purpose of the options is to make it easier for payroll to administer. Options: 1) a particular day per week, 2) set number of hours each day, 3) block of time, like week(s) or month(s), 4) set number of days (from payroll).

WWW: Jeanne, check with Joyce on options and combinations thereof, report back, asap

## DISTRICT/FUSE RECOLLECTIONS

Date: **Wednesday, June 9, 2004**

Time: 1:30-5:00

Place: Fireside Room

3.5

### FOR THE DISTRICT

John Bukey (absent)

Ron Martinez\* (absent)

Doug Smith

Jeanne Leland

### FOR THE UNION

Shari Newman\*

Bernard Acuna (absent)

Carolyn Warner

Gerri Snell

Sue Keller

\*Chief Negotiator

Facilitator: Joanne Bodine

### • Check-In

Joanne reviewed possible process uses for check-in: process check, rumor, head's up, elephant, off agenda, report back on off-line work, review of recollections, logistics, and agenda. The group felt this would be useful to incorporate these into our check-in process.

### Agenda Items

1. Custodian Range (item closed)
2. Review of Draft of Personnel Items (Board Agenda) (item closed)
3. Heavy Lifting (pending)
4. Furloughs (item closed)
5. Recollections 3/24 and 5/19 (item closed)
6. Post '94 Language (item closed)
7. Temp Employee Range (pending)
8. Evaluator Positions (pending)
9. Side letter re: BFAF Temp position 0304-07 signed (item closed)
10. Side letter re: Career Ladders 0304-06 signed (item closed)

**NCC Standby Protocols** (pending)

Invite NCC rep to explain at a special single agenda item meeting. The group agreed to have an off-line meeting w/FUSE to discuss.

WWW: Jeanne, set up meeting, asap

**EOPS Financial Aid Position** (item closed)

Temporary re-assignment of work location. Use furlough to reduce work schedule.

Temporary reassignment to end 8/20/04.

**#1 - Custodian Range** (item closed)

Option: Custodian = Range 14 and existing 12 be a 14 as well and assume 14 duties effective June 9 July 1, 2004. **Consensus**



## DISTRICT/FUSE RECOLLECTIONS

Date: **Wednesday, June 23, 2004** (last meeting of 03-04)

Time: 1:30-5:00

Place: Fireside Room

3.5

### FOR THE DISTRICT

John Bukey (absent)

Ron (Martinez)

Doug (Smith) (in 2:00) — 3.0

Jeanne Leland

### FOR THE UNION

Shari Newman\*

Bernard Acuna

Carolyn Warner

Gerri Snell

Sue Keller

\*Chief Negotiator

Facilitator: Joanne Bodine

- Check-In
- Agenda

1. Check in, heads up, rumor control, recollections, elephants
  - Recollections for 6/16/04 approved with minor changes
  - Rumor control:  
Shari shared concern about rumor that FUSE "negotiated or "signed away positions" and need to clarify, particularly in Senate, where "story" started.  
Outcome:  
Shari, Ron, and Doug go to Classified Senate to clarify situation as part of "normal" business. Schedule visit with Dean's Council for 1<sup>st</sup> meeting in August to do same thing.  
Ron will handle Council logistics  
Shari will handle Senate logistics.
  - Ron reported out on closed session Board meeting. Neil Bodine provided facilitation to identify the Boards' interests regarding compensation
  - Temporary paperwork process clarification  
Jeanne provided update on process
  - Lead position in Payroll  
There is currently a process for establishing a lead. This process is to be followed. Employees need to be aware that the lead is a temporary position.  
www: Ron, will talk with Joyce and Shari to resolve, asap
  - PPT converting to .50 FTE positions  
Ron provided a "heads up" that 4 of the 5 Multimedia Production Control Room Assistants will soon be converted from PPT to half-time positions with prorated benefits as part of EP&S reorg
  - NCC Standby Protocols  
Meeting pending with TLT, Ron, Shari, and Bernard to discuss
  - Issue of validity of side letter  
Side letter 0304-02 and 0304-05 regarding the compensation formulas

#### Outcome:

Group will meet on August 25<sup>th</sup> to continue this discussion

Sierra Joint Community College District  
 Collective Bargaining  
 FY 2003-2004  
 Schedule 1-B  
 At-Table Negotiations: Certificated

Date	Leland, Jeanne	Martinez, Ron	McKnight, Diane	Smith, Doug
9.4.03	2.50	2.50		1.70
9.11.03	2.50	2.50	2.50	2.50
10.16.03	5.00	5.00		5.00
10.30.03	2.70	2.70	2.70	2.70
11.6.03		1.80	1.80	1.80
11.20.03	1.30	1.30	1.30	1.30
12.4.03	2.00	2.00	2.00	2.00
12.11.03	1.00	1.00	1.00	1.00
1.29.04	2.00	2.00	2.00	2.00
2.19.04	2.50		2.50	2.50
2.26.04	2.50	2.50	2.50	2.50
3.4.04	1.20	1.20		1.20
3.11.04	1.20	1.20	1.20	1.20
3.18.04	2.30	2.30	2.30	2.30
4.1.04	2.50	2.50	2.50	2.50
4.22.04	2.50	2.50	2.50	
4.29.04	2.30	2.30	2.30	2.30
5.6.04	2.50	2.50	2.50	2.50
5.27.04	2.00	2.00	2.00	2.00
6.17.04	2.00	2.00		
<b>Totals</b>	<b>42.50</b>	<b>41.80</b>	<b>33.60</b>	<b>39.00</b>

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **September 4, 2003**  
Time: 2:00-4:30 PM  
Location: J7A

(2.5)

**FOR THE DISTRICT**

John Bukey (facilitator)  
Jeanne (Leland)  
Ron (Martinez)\*  
Diane (McKnight) (absent)  
Doug (Smith) (in 2:50) — (1.7)

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee (absent)  
Winsome Jackson  
Luis Sanchez\*  
Deb Sutphen  
Jim Weir

\*Chief Negotiator

- Check-In: Don Cosper will act as SCFA's facilitator.

**1. Release Time**

Side letter 0304-01 was revised and signed. Ron stated the part-time faculty release time stipends were submitted late. The checks will be processed on 10/10 payroll instead of the 9/10 payroll. If this is a hardship, an exception check can be processed. SCFA would like to continue to post side letters on their webpage. Confidentiality will be maintained. If posting the side letter results in a problem, it may require revisiting the issue.

**3. JLMC Opting Out SCCP (pending)**

Possibly use Don as facilitator for the proposed SCCP.

WWW: Ron, check with FUSE regarding dual facilitation, for next time

**4. Sunshine List & Ground Rules**

Ground Rules and Sunshine List reviewed and signed. Sunshine List will be published in the October Board of Trustees agenda.

**5. Income Formula**

SCFA would like to bring financial experts, Cliff Burns, Keith Weidkamp, and Stan Spencer, in order to make it more understandable. Another resource would be someone from Los Rios who has been using for formula method for many years. The formula is an agenda priority. The formula effects discussion of other issues (leaves, stipends).

**6. Medicare (pending)**

Ron informed the group of a new STRS program that would make those individuals without 40 quarters (current requirement by Social Security for Medicare eligibility) eligible for Medicare. The program would be paid for by Social Security. Program specifics will be coming out soon.

SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential

NT-cert

Date: September 11, 2003  
Time: 2:00-4:30 PM  
Location: J7A

2.5

FOR THE DISTRICT

- John Bukey
- Jeanne Leland
- Ron Martinez\*
- Diane McKnight
- Doug Smith

FOR THE ASSOCIATION

- Richard Alman
- Wayne Barbee
- Winsome Jackson (3:15)
- Luis Sanchez\*
- Deb Sutphen
- Jim Weir
- Don Cospser (facilitator)

\*Chief Negotiator

- Check-In

**1. Release Time (item closed)**

Side letter 0304-01 was revised and signed. Ron stated the part-time faculty release time stipends were submitted late. The checks will be processed on 10/10 payroll instead of the 9/10 payroll. If this is a hardship, an exception check can be processed. SCFA would like to continue to post side letters on their webpage. Confidentiality will be maintained. If posting the side letter results in a problem, it may require revisiting the issue.

**2. JLMC Opting Out SCCP (item moved to JLMC Agenda)**

Possibly use Don as facilitator for the proposed SCCP. Ron checked with FUSE regarding dual facilitation and FUSE is fine with the idea. They did not name who their facilitator might be.  
WWW: Dennis Lee, provide numbers dealing with effects of opting out, first the number of Sierra College employees only with Sierra College dual coverage and second, the effect of dual coverage in outside of Sierra College. What is the effect on the pool?, item moved to JLMC agenda.

**3. Sunshine List & Ground Rules (item closed)**

Ground Rules and Sunshine List reviewed and signed. Sunshine List will be published in the October Board of Trustees agenda.

**4. Income Formula**

Discussion is scheduled to begin regarding the formula. The group agreed (consensus) to agendize the following dates for discussion: 9/18, 9/25, 10/2. Time will be allowed for critical off-agenda items. Discussion will consist of formula history (01-02), status (02-03), and future estimates for 03-04. Doug will provide data.  
WWW: Jeanne, update full-time faculty FTE, for next time

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **October 16, 2003**  
Time: 2:00-7:00 PM  
Location: J7A

(5.0)

**FOR THE DISTRICT**

John Bukey (absent)  
Jeanne Leland  
Ron Martinez\*  
Diane McKnight (absent)  
Doug Smith

\*Chief Negotiator

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson (3:15)  
Luis Sanchez\* (facilitator)  
Deb Sutphen  
Jim Weir  
Don Cospers (absent)

Guests: Keith Weidkamp; Dennis Smith and Jon Sharpe of LRCCD (3:00)

- Check-In
- Today's meeting began with a check-in, a review the recollections from last week, and discussion of off-agenda items. At 3:00 our guests from Los Rios provided information regarding their formula process. Afterwards, a smaller group from the table remained to develop formula options.

**1. Income Formula**

Guests Dennis Smith (President of LRCFT) and John Sharpe (LRCCD Vice Chancellor, Finance and Administration) presented the Los Rios formula to the group. They described an interest-based formula process that involves all of their employee groups and provides some predictability and district-wide understanding of compensation and college funding. They have integrated a successful formula process that is now part of the Los Rios culture.

Later in the meeting a smaller group from the table (Winsome, Luis, Deb, Richard, Jim, Ron, Doug, and Jeanne) remained to develop options for resolution of the 02-03 formula.

**2. Classified Instructors (pending)**

Ron handed out a simulation to determine rate of pay for classified employees. This is not a formula-related expense, but comes from District's bucket. SCFA Exec Board will continue to discuss the issue. There are concerns regarding part-time and full-time faculty assignments, the relationship to classified teaching assignments and expectations of assignments. How does this work with Article 28?

**3. Retiree Arbitration (pending)**

Item to remain for updates.

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **October 30, 2003**  
Time: 2:00-4:40 PM  
Location: J7A

(2.7)

**FOR THE DISTRICT**

John Bukey  
Jeanne Leland  
Ron Martinez\*  
Diane McKnight  
Doug Smith

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson (3:15)  
Luis Sanchez\* (facilitator)  
Deb Sutphen  
Jim Weir  
Don Cospers

\*Chief Negotiator  
Guest: Bill Tsuji (3:15)  
• Check-In

**1. Income Formula**

Side letter #0304-04 was signed as a tentative agreement and Board approval is pending (11/11/03). The group discussed interest-based training. Deb reported on the cost of a training at a host site – approximately \$14,800.00 plus expenses. Luis is planning to attend the February conference of the Center for Collaborative Solutions. He will report back on the value of the training. Anticipate full participation of both bargaining units.

WWW: Deb will contact Dennis Smith at Los Rios for additional information regarding their training model.

WWW: Ron, contact Michelle Devol to set up a facility away from campus for approximately 16 people.

WWW: Deb will contact the consulting firm and explore the option of a 2-day training during Flex week in January.

**2. Classified Instructors (pending)**

The group reached consensus to develop interests and options regarding this issue at our next meeting. Diane to facilitate.

WWW: Ron, bring back a sample hourly rate schedule, for next time

**3. Retiree Arbitration (pending)**

Luis reported he'll be meeting with retirees on 11/5/03 and should have something to report back, for next time.

**4. Post-94 Trust (pending)**

Post 94 subcommittee met with Shana on 10/27. Plan structure was finalized and information will be going out to all staff via e-mail. The subcommittee will make a recommendation at the JLMC meeting 11/5/03. FUSE has yet to ratify. There was some

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: November 6, 2003  
Time: 2:00-3:45 PM  
Location: J7A

1.8

**FOR THE DISTRICT**

John Bukey  
Jeanne Leland (absent)  
Ron Martinez\*  
Diane McKnight  
Doug Smith (facilitator)

\*Chief Negotiator

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson (3:15)  
Luis Sanchez\*  
Deb Sutphen (absent)  
Jim Weir  
Don Cosper (absent)

- Check-In

**1. Income Formula**

Side letter #0304-04 was signed as a tentative agreement and Board approval is pending (11/11/03). The group discussed interest-based training. Anticipate full participation of both bargaining units.

Deb sent an email to Dennis Smith for additional information regarding their IBA training. She also contacted the Center for Collaborative Solutions regarding training for January 19<sup>th</sup> and 20<sup>th</sup>. Maureen McEnerney from the Center has a trainer who does advanced IBA training. Estimated cost for trainer plus expenses is \$4800.00. Maureen will prepare a contract once trainer is scheduled.

WWW: Ron, advise Deb and Jeanne to go with \$4,800.00 for January 19<sup>th</sup> and 20<sup>th</sup>, asap.

WWW: Ron, work with Michelle DeVol to book out of town overnight, possibly in Napa, asap.

WWW: Doug, bring in Los Rios (Dennis Smith and Jon Sharpe) to provide a bucket overview, schedule for December 4.

WWW: Ron, invite FUSE to December 4 presentation and advise of January 19 & 20<sup>th</sup> overnight training schedule, asap.

WWW: Ron, arrange for a large room with whiteboard for December 4 meeting, asap

**2. Classified Instructors (pending)**

The group reached consensus to develop interests and options regarding this issue on November 13, 2003 meeting. Diane to facilitate. Ron brought back a sample hourly rate schedule.

WWW: Ron, ask Sue Drennon to prepare an actual placement of the classified employees if they were to be hired as instructors, for 11/12/03 meeting.

WWW: Luis, will request in Exec to review and discuss with Executive Board.

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: November 20, 2003  
Time: 3:30-4:45 PM  
Location: J7A

1.3

**FOR THE DISTRICT**

John Bukey  
Jeanne Leland  
Ron Martinez\*  
Diane McKnight  
Doug Smith

\*Chief Negotiator

Guests: Morgan Lynn and John Volek

**FOR THE ASSOCIATION**

Richard Alman (facilitator)  
Wayne Barbee  
Winsome Jackson  
Luis Sanchez\*  
Deb Sutphen  
Jim Weir  
Don Cosper

• Check-In

**1. Income Formula**

Side letter #0304-04 tentative agreement was approved by the Board of Trustees on 11/11/03. The group discussed interest-based training. Anticipate full participation of both bargaining units. District and SCFA are committed to the training. District is still working with FUSE. The dates tentatively scheduled of January 19 & 20 won't work. These optional dates have been identified:

1<sup>st</sup> choice February 19 & 20

2<sup>nd</sup> choice January 14 & 15

WWW: Group, consider these dates for training and check in, next meeting.

Once dates are set:

WWW: Deb, contact the Center for Collaborative Solutions to schedule trainer, asap.

WWW: Ron, work with Michelle DeVol to book out of town overnight, possibly in Napa, asap.

The group would like to, bring in Los Rios (Dennis Smith and Jon Sharpe) to provide a bucket overview. December 4<sup>th</sup> date won't work. We will reschedule for sometime in late January or February.

WWW: Doug, to schedule Los Rios bucket presentation, asap

WWW: Jeanne, arrange for a large room with whiteboard for bucket over presentation, asap

**2. Classified Instructors (pending)**

Morgan Lynn participated in today's discussion. She described the benefits of classified instructors for District and students. We currently have classified staff teaching at other colleges when we would benefit from being able to have them teach for us instead. The District will benefit from "growing their own" by developing classified staff with minimum qualifications as instructors. It provides classified staff with necessary the



**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **December 4, 2003**  
Time: 2:00-4:00 PM  
Location: J7A

(2.0)

**FOR THE DISTRICT**

John Bukey (facilitator)  
Jeanne Leland  
Ron Martinez\*  
Diane McKnight  
Doug Smith

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson (3:15)  
Luis Sanchez\*  
Deb Sutphen  
Jim Weir

\*Chief Negotiator  
Guests:

- Check-In

**1. Income Formula**

District and SCFA are committed to interest-based training.

WWW: Deb, work with CCS to find a Thursday-Friday date in February, asap.

Once dates are set:

WWW: Deb and Jeanne, find a meeting location, asap.

The group would like to, bring in Los Rios (Dennis Smith and Jon Sharpe) to provide a bucket overview before the training. We'll reschedule for sometime in late January or February.

WWW: Doug, to schedule Los Rios bucket presentation, asap

When date is set:

WWW: Jeanne, arrange for a large room with whiteboard for bucket over presentation, asap

**2. Classified Instructors (item closed)**

Side Letter 0304-06 was signed.

**3. Part-Time Faculty Pay Issue (pending)**

Professional contract proposal is currently under legal review. This discussion is to continue in February. PSC would be an income formula item and would need to be prioritized with other financial issues. Possible option is to redo coaching stipends rather than pursue PCS.

WWW: Wayne, develop stipend proposal, for next time

WWW: Winsome, contact Alan Frey who recently presented this issue at a union conference, report back in February.

WWW: Deb, call the two schools using PSC for information, report back in February.

WWW: Winsome, to talk with faculty for their input, report back in February.

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **December 11, 2003**  
Time: 2:00-3:00 PM  
Location: J7A

(1.0)

**FOR THE DISTRICT**

John Bukey (absent)  
Jeanne Leland  
Ron Martinez\*  
Diane McKnight  
Doug Smith

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson (3:15)  
Luis Sanchez\*  
Deb Sutphen  
Jim Weir

\*Chief Negotiator

Guests: Don Cosper, Stephanie Guevara, Mandy Davies, Barbara Battenberg

- Check-In

**1. Tenured and Non-Tenured Faculty Evaluation Forms** (Stephanie Guevara)  
A rumor was reported that there are forms (at least 3) in use that have not been approved at the table. This is a priority agenda item for the table to clarify the forms to be used and to develop an approval process.

**Faculty Researcher Evaluation Documents**

Morgan gave the forms to Ron who gave them to Stephanie Guevara to revise and possibly bring back to the table on 12/11/03

Stephanie provided handouts of the two evaluation forms:

1. Faculty Evaluation/Performance Appraisal, Staff Survey Form for Special Services Faculty Researcher (draft, yellow)
2. Faculty Evaluation/Performance Appraisal, Staff Survey Form for Special Services Research and Resource Development Coordinator (draft, blue)

These forms were drafted by the effected faculty and she placed them in her evaluation format. The group reviewed the forms and asked that the on the yellow form #13 is moved to the bottom. The blue form is to have #13 deleted. With those changes the group **approved** the forms.

The group discussed the proposed controls for all evaluation forms. It was agreed that Human Resources would be the keeper of the forms. The most current and approved forms will be kept in Outlook Public Folders. Users will be provided a menu and instructions to select the appropriate forms for the various types of evaluations. The contract refers to a manual of forms but the controlled public folder may be a better option. Stephanie and Judy will meet to organize materials.

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **January 29, 2004 (1<sup>st</sup> meeting of 2004)**  
Time: 2:00-4:00 PM  
Location: J7A 2.0

**FOR THE DISTRICT**

John Bukey (absent)  
Jeanne Leland  
Ron Martinez\* (facilitator)  
Diane McKnight  
Doug Smith

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson  
Luis Sanchez\*  
Deb Sutphen (absent)  
Jim Weir (absent)

\*Chief Negotiator  
Guests: Don Cosper

• **Check-In:**

If there was one thing you could change about yourself, what would it be?

**Contract Rewrite (Don Cosper)**

Don reported on the progress of the rewrite and provided a handout for content review and format direction. The handout contains articles 1, 2-12, 32-34. His ideas for the rewrite include a contract that is user friendly, is available on a website, contains a table of contents that includes subheadings, contains tabs for sections, incorporates side letters and dated documents. Jo Sumner has been working with a software program (Master Document) that offers various features for automation and format. Today Don is asking the group to approve the formatting and eliminating the subheading and numeric format of previous contracts.

The group agreed to Don's proposed contract format.

Today's handout contained the drafts of the Online article and FERC article revisions. The group discussed ways to track the rewrite process. Don will flag (using color coding) substantive changes for understanding and approval. We'll do a side by side read.

WWW: The Distance Learning and the FERC committees will review the current rewrites/revisions for consistency with previous recommendations made at the table. Both articles will return here for final approval, asap.

The Department Chair article still needs work. The plan is to ratify the three articles and continue to work on the rest.

Online evaluation needs connection to larger evaluation article.

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **February 19, 2004**  
Time: 2:00-4:30 PM  
Location: J7A

(2.5)

**FOR THE DISTRICT**

John Bukey (absent)  
Jeanne (Leland)  
Ron Martinez\* (absent)  
Diane (McKnight) (facilitator)  
Doug (Smith)

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson  
Luis Sanchez\*  
Deb Sutphen  
Jim Weir

\*Chief Negotiator

Guests: Don Cosper and Jo Sumner

- **Discussion Topic** – Evaluations (manual and part-time faculty)  
WWW: Ron, check on Evaluation Committee, asap
  
- **Check-In**

**Compressed Calendar** (Diane McKnight)

Diane provided handouts of the most recent version. She reported on the forum held here at the Rocklin campus yesterday. Another forum will be held Friday at 10:00 at the NCC campus and the committee is considering another forum to be held at Roseville Gateway. Diane reported that classified staff had concerns regarding sufficient staffing and equipment. Those concerns will be forwarded to the area managers. She reported the faculty had concerns about difficulty of finals week and also needing more time to report grades. The calendar committee is an SCFA committee. After the forums, SCFA/faculty will vote in early March. If approved, the calendar will go to the Board of Trustees for approval. A subcommittee will be needed to review the 16 week compressed calendar and its effects on current contract language.

**(Article 28 - Seniority)**

A question was raised regarding seniority in the summer session. Does a full-time faculty have seniority over part-timer faculty regarding summer assignments? The group decided this is an item for agenda as it relates to the 16-week calendar. Jim Weir suggested an option of making the summer session with same with regard to seniority as Fall and Spring. Wayne suggested another option allowing seniority process for part-time coaches to be the same during the summer as regular part-time faculty (removing the limitation) as there are no sports to coach during summer.

WWW: Diane, take to Deans' Council for discussion, asap

Another issue is the possibility for full-time faculty to "swap" semesters (for example, Fall/Spring for Summer/Fall as one possible combination).

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **February 26, 2004**  
Time: 2:00-4:30 PM  
Location: J7A

(2.5)

**FOR THE DISTRICT**

John Bukey  
Jeanne (Leland)  
Ron (Martinez)  
Diane (McKnight)  
Doug (Smith)

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson  
Luis Sanchez\* (facilitator)  
Deb Sutphen (out 2:30)  
Jim Weir

\*Chief Negotiator

Guests: Don Cosper and Jo Sumner (2:00-2:55), Mandy Davies (3:30-4:00)

• **Check-In**

**Contract Rewrite** (Don and Jo)

Don and Jo presented drafts of articles 5-8 for review and to clarify the revisions, if any, they may have made. Don and Jo noted several grammatical edits needed.

WWW: Don and Jo, rewrite the release time article 5, when possible

WWW: Ron, article 8.8 lines 9-14 and 8.2 lines 1-6, check accuracy, for next week

Don will begin with article 9 for next time. Jo will be out for the next two meetings.

The Distance Learning and the FERC committees will review their respective drafts of articles 10 and 32. Both articles will return here for final approval, when possible.

**Off-Agenda Items**

A side letter for a full-time faculty member regarding carryover of load was not signed due to pending discussions.

**Evaluations**

Ron contacted Stephanie Guevara for the status of the work done by the evaluations committee. Stephanie will contact Winsome to see where SCFA is with this issue. The plan is to review the article and documents and rather than reinvent the evaluation process, just use what has been developed. The desired outcome is the documents to be consistent and use a common scale. We will revisit this when Stephanie is ready. Judy McClymonds in HR is the gatekeeper of the forms. She has posted the approved forms on public folders. We will need to develop a process to sign off on the revised manual.

**Compressed Calendar** (Diane McKnight & Mandy Davies)

Diane reported that substantial preparation work needs to be completed in the division offices regarding implementation of the compressed calendar. If a poll goes out next week, the results can be known within two weeks or by 3/11. The poll would be an

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **March 4, 2004**  
Time: 2:00-3:10 PM  
Location: J7A

(1.2)

**FOR THE DISTRICT**

John Bukey (facilitator)  
Jeanne Leland  
Ron Martinez\*  
Diane McKnight (absent)  
Doug Smith

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson  
Luis Sanchez\*  
Deb Sutphen  
Jim Weir

\*Chief Negotiator

• **Check-In**

**Off-Agenda Items**

**Load Carryover**

A side letter for a full-time faculty member regarding carryover of load was not signed due to pending discussions.

WWW: Luis, meet with Stephanie Guevara, when possible

**Medicare**

A memo dated 12/1/03 went out regarding Medicare eligibility. Since social security is not deducted from faculty paychecks, they may not have the necessary 40 quarters/10 years with social security to be eligible for Medicare. There is a window of opportunity to become eligible.

WWW: Doug, check with Joyce and Robert, report back

**PE Activity Classes**

Wayne proposed adding a lecture component to a large number of PE activity classes in order to increase the load from 1.0 to 1.5. The group agreed that this issue would be the purview of the curriculum committee and faculty senate and as long as this change meets academic rigor and the chancellor's office requirements it is not a negotiable item.

**Agenda**

**Contract Rewrite** (Don and Jo-absent)

3/4/04 - The group agreed to meet with FERC on April 22 at 3:00 in the Fireside room. Jeanne reported that the Distance Learning committee is fine with the contract language Jo and Don prepared. There is an outstanding item regarding office hours.

(From 2/26/04)

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **March 11, 2004**  
Time: 2:00-3:10 PM  
Location: J7A

(1.2)

**FOR THE DISTRICT**

John Bukey  
Jeanne (Leland)  
Ron (Martinez)\*  
Diane (McKnight)  
Doug (Smith)

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson  
Luis Sanchez\*  
Deb Sutphen  
Jim Weir (facilitator)

\*Chief Negotiator

Guests: Don Cosper (2:00-3:00) Joyce Lopes (3:35-4:00)

- **Check-In**

**Agenda**

**Load Carryover (pending)**

A side letter for a full-time faculty member regarding carryover of load was not signed due to pending discussions.

WWW: Luis, meet with Stephanie Guevara, when possible

**Medicare**

A memo dated 12/1/03 went out regarding Medicare eligibility. Since social security is not deducted from faculty paychecks, they may not have the necessary 40 quarters/10 years with social security to be eligible for Medicare. There is a window of opportunity to become eligible.

Doug invited Joyce to attend today's meeting. She reported that there is an open election period. Ballots need to be out by the last week of March or at the latest April 1<sup>st</sup>.

Response needed by 4/16/04 to meet deadline. The unit needs to approve allowing those eligible the option of participating. If approved, eligible employees (who are already identified) and hired pre-1986, each have the option of deciding individually to participate. Does it effect both part-time and full-time? What are the ramifications of opting in? What is received in exchanged for an estimated 1.45% cost?

WWW: Joyce, to present written information and provide answers to the questions asked above, 3/18/04

**PE Activity Classes (item closed)**

Wayne proposed adding a lecture component to a large number of PE activity classes in order to increase the load from 1.0 to 1.5. The group agreed that this issue would be the purview of the curriculum committee and faculty senate and as long as this change meets academic rigor and the chancellor's office requirements it is not a negotiable item.

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **March 18, 2004**  
Time: 2:00-4:15 PM  
Location: J7A

23

**FOR THE DISTRICT**

John Bukey (facilitator)  
Jeanne (Leland)  
Ron (Martinez\*)  
Diane (McKnight)  
Doug (Smith)

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson  
Luis Sanchez\*  
Deb Sutphen  
Jim Weir

\*Chief Negotiator

Guests: Don Cosper & Jo Sumner (2:00-3:00), Joyce Lopes (3:25-4:00)

- **Check-In**

**Agenda**

**Load Carryover (pending)**

A side letter for a full-time faculty member regarding carryover of load was not signed due to pending discussions.

WWW: Luis, meet with Stephanie Guevara, when possible

**Medicare**

Joyce attended today's meeting and provided a handout from the CalSTRS Medicare benefit program describing the eligibility requirements, etc. This is not a contractual item, however this group will most likely receive questions and/or requests for advice from eligible employees. This is strictly the individual's responsibility and choice. The district cannot provide advice but only information. Joyce has a list of eligible employees that Robert Wickstrom had developed. Ballots will go to these qualified individuals by April 1<sup>st</sup> by certified mail. Response to the district is required by April 11, 2004. Each qualified employee can choose whether or not they wish to participate.

WWW: Joyce, double check eligible employee list, prepare a draft transmittal with handout and send by certified mail, by April 1, 2004.

WWW: Jim, will send an email, asap

**Contract Rewrite**

This group will meet with FERC on April 22 at 3:00 in the Fireside room.

The Distance Learning committee reported they approved of the revised contract language prepared by Jo and Don. There is an outstanding item regarding Distance Learning office hours. Both articles, 10 and 32, will return here for final approval, when possible.

WWW: Jeanne, check with Distance Learning committee to find out how they wish to handle office hours, asap.



**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: April 1, 2004  
Time: 2:00-4:30 PM  
Location: J7A

(2.5)

**FOR THE DISTRICT**

John Bukey  
Jeanne Leland  
Ron Martinez\*  
Diane McKnight  
Doug Smith

**FOR THE ASSOCIATION**

Richard Alman (facilitator)  
Wayne Barbee  
Winsome Jackson  
Luis Sanchez\*  
Deb Sutphen  
Jim Weir

\*Chief Negotiator  
Guests: Jo Sumner (2:00-3:00)

- **Check-In**

**Agenda**

**Load Carryover (pending)**

A side letter for a full-time faculty member regarding carryover of load was not signed due to pending discussions.

WWW: Luis, meet with Stephanie Guevara, when possible

**Medicare**

Jim reported he sent out an email regarding the CalSTRS Medicare information and did not receive any responses/questions.

Joyce attended the 3/18/04 meeting and provided a handout from the CalSTRS Medicare benefit program describing the eligibility requirements, etc. This is not a contractual item, but this group will most likely receive questions and/or requests for advice from eligible employees. This is strictly the individual's responsibility and choice. The district cannot provide advice but only information. Joyce has a list of eligible employees that Robert Wickstrom had developed. Ballots will go to these qualified individuals by April 1<sup>st</sup> by certified mail. Response to the district is required by April 11, 2004. Each qualified employee can choose whether or not they wish to participate.

WWW: Joyce, double check eligible employee list, prepare a draft transmittal with handout and send by certified mail, by April 1, 2004.

Joyce reported to Jeanne that the ballots were mailed on March 24<sup>th</sup>, 2004 to ensure delivery by April 1<sup>st</sup>.

**Contract Rewrite**

This group will meet with FERC on April 22 at 3:00 in the Fireside room.

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **April 22, 2004**  
Time: 2:00-4:30 PM  
Location: J7A, Fireside

(25)

**FOR THE DISTRICT**

John Bukey  
Jeanne (Leland)  
Ron (Martinez\*) (facilitator)  
Diane (McKnight)  
Doug Smith (absent)

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson  
Luis Sanchez\*  
Deb Sutphen  
Jim Weir

\*Chief Negotiator

Guests: Jo Sumner and Don Cospers (3:00-4:30)

- **Check-In**
- **Agenda**

**Load Carryover (item closed)**

Luis met with Stephanie. No further action required at this time.

**Medicare (item closed)**

Joyce reported to Jeanne that the ballots were mailed on March 24<sup>th</sup>, 2004 to ensure delivery by April 1<sup>st</sup>.

**Contract Rewrite**

**FERC**

We met with FERC on April 22 at 3:00 in the Fireside room. Changes were recommended to draft contract language (Art. 10). Verification Period - disputes will come to Human Resources, and then to the Joint Review Committee for resolution. The JRC decision is final. Grievance is the last option. Luis requested time to check the evaluation article that describes the JRC composition. Further edits were made to language (pg. 11.1, lines 22-24; pg. 11.2 lines 5-6, 28; pg. 11.3 lines 19, 36, 40). Jo and Don will revise for the group to review. Also, rather than wait for the completion of the entire contract, implementation of the revised FERC could begin July 1, 2004, once tentative agreement is reached.

**Distance Learning**

The group reviewed Suzanne's sample contract language regarding office hours and requested that she clarify office hours as it relates to part-time faculty. Jo will work it into the article following receipt of Suzanne's sample language. Both articles, 10 and 32, will return here for final approval, when possible.

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **April 29, 2004**  
Time: 2:00-5:15 PM  
Location: J7A

(2.3)

**FOR THE DISTRICT**

John Bukey  
Jeanne Leland  
Ron Martinez\*  
Diane McKnight  
Doug Smith

**FOR THE ASSOCIATION**

Richard Alman (absent)  
Wayne Barbee (facilitator)  
Winsome Jackson  
Luis Sanchez\*  
Deb Sutphen  
Jim Weir

\*Chief Negotiator

Guests: Jo Sumner and Don Cosper (2:00-3:00)

- **Check-In**
- **Agenda**

**Contract Rewrite**

Jo prepared and distributed contract rewrite binders for the group. The binders contain an information sheet describing the status of each article. Also included is the latest version of each article reviewed. We will be using these on a weekly basis until the contract revision is completed.

Today the group reviewed articles 14-24. Don and Jo reported there were no major changes. FERC (Art. 10 & 11) and Distance Learning are still pending final revisions. The Department Chair article may go in unchanged pending further discussion and/or negotiation. The group discussed the appendixes and side letters to decide what would remain in the contract, either as an appendix or incorporated into contract language, and what was expired and should be deleted. It was agreed that those items referring to the income formula would be placed in a separate article (appendix H, I, and J). The grievance form will remain with the grievance article rather than in the appendix or in a separate forms manual. The idea is, if it is contractual, then it should remain in the contract, if not, it can be placed in the forms manual. The group agreed that those side letters not incorporated in a particular article will be kept on file with the Human Resources, Labor Relations Dept.

Notes:

Art. 5 – Jo and Don to revise

Art. 9.2 – WWW: Jeanne, check with Sue Drennon regarding her request to eliminate “units” from the Units/FTE columns, asap

Art. 15 – validate all annual days

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **May 6, 2004**  
Time: 2:00-4:30 PM  
Location: J7A

(2.5)

**FOR THE DISTRICT**

John Bukey (facilitator)  
Jeanne Leland  
Ron Martinez\*  
Diane McKnight  
Doug Smith

**FOR THE ASSOCIATION**

Richard Alman (absent)  
Wayne Barbee  
Winsome Jackson (absent)  
Luis Sanchez\*  
Deb Sutphen (absent)  
Jim Weir

\*Chief Negotiator

Guests: Jo Sumner and Don Cospers (2:00-3:00)

- **Check-In**
- **Agenda**

**Contract Rewrite**

Neither Jo nor Don will be able to attend on May 20<sup>th</sup>. Jo handed out final drafts of the contract. She will begin indexing and would like some direction from the group as to what we would like to be indexed.

WWW: All, provide Jo with a list of terms for indexing, if you wish

WWW: Jeanne, load contract on our HR website, asap

WWW: John, insert Post '94 contract language, asap

WWW: All, review for accuracy and completeness.

**Consensus** – Forego negotiations on May 13<sup>th</sup> and each group use time for contract review. We will review the first 13 articles, as one group, on May 20<sup>th</sup> and the remaining articles on the May 27<sup>th</sup>. We agreed to schedule another meeting after finals, if necessary, to complete the work.

Once the contract review is complete, HR will take material to place on website and have copies will be printed for regular distribution.

**Contract Revision Notes:**

Art. 5 – Jo and Don to revise

Art. 9.2 – WWW: Jeanne, check with Sue Drennon regarding her request to eliminate “units” from the Units/FTE columns, asap

Art. 10 & 11 – FERC language needs to be TA'd. These articles will be implemented upon signing.

Art. 15 – validate all annual days

Art. 16.2 – verify ed code reference 87780 & 87796

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: May 27, 2004  
Time: 2:00-4:00 PM  
Location: J7A

(2.0)

**FOR THE DISTRICT**

John Bukey (facilitator)  
Jeanne Leland  
Ron Martinez\*  
Diane McKnight  
Doug Smith

**FOR THE ASSOCIATION**

Richard Alman (absent)  
Wayne Barbee  
Winsome Jackson  
Luis Sanchez\*  
Deb Sutphen (absent)  
Jim Weir

\*Chief Negotiator

Guests: Jo Sumner (2:00-3:00)

• **Check-In**

**1. Contract Rewrite**

There was some discussion regarding numbering within the contract. There are some limitations due to the software.

Notes:

1. Art. 1 – Appendix A should be updated each year regarding titles.
2. The number references for all the Board policies and administrative procedures need to be checked throughout the contract.
3. Jo will create a listing of committees
4. Prep articles 10 & 11 (FERC) for tentative agreement
5. Art. 15 – Split coaches and coordinators make reference to PT stipends
6. Art. 23 – to Suzanne and Distance Learning Committee
7. Art. 1-12 – ok – Jo will update and split up coaches and coordinators
8. Art. 13- delete STAR and Work base coordinators
9. Art. 15 – Add 22 days, EOPS s/b 220 not 212, Campus Life Coordinator s/b 190 not 220.

Another meeting is scheduled for June 17 to complete contract review. John will facilitate.

**2. Distance Learning (pending)**

Suzanne asked that part-time faculty office hours be assigned to all faculty teaching on-line. However, contractually, office hours for part-time faculty are voluntary and assigned based on load. The group agreed that she would need to make the language as “strongly encourages” or something of that nature, regarding part-time faculty office hours at this time. The group wants to know that the Distance Learning committee is approving of the language.

WWW: Suzanne, take DL article to Deans' Council, asap

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **June 17, 2004** (last meeting of 2003-2004)  
Time: 2:00-4:00 PM  
Location: J7A

(2.0)

**FOR THE DISTRICT**

John Bukey (facilitator)  
Jeanne Leland  
Ron Martinez\*  
Diane McKnight (absent)  
Doug Smith (absent)

**FOR THE ASSOCIATION**

Richard Alman (absent)  
Wayne Barbee (absent)  
Winsome Jackson  
Luis Sanchez\*  
Deb Sutphen (absent)  
Jim Weir (absent)

\*Chief Negotiator

Guests: Jo Sumner (2:00-3:00), Joyce Lopes (2:00-2:20)

• **Check-In**

1. **Part-Time Faculty Pay Dates**

Joyce Lopes reported that she is working with PCOE and checks will be mailed the day we get them at Sierra, the 8<sup>th</sup> or 9<sup>th</sup> of the month but not after the 10<sup>th</sup>. She is working to develop a schedule six months in advance. New forms will be developed for part-time faculty to elect pick up or mail. There is a possibility that checks can be made available for pick-up at the various campuses except Truckee. Once the checks are placed in the mail, they are in the hands of the US postal service.

**Off-Agenda Items**

1. **Flex Reports**

Ron reported that he was told several faculty refused to complete the required flex form. The CBA states that pay can be deducted for non-compliance. Letters will go out to those faculty and provide them with some additional time to comply. If they do not meet the new deadline, then follow contract language for next steps.

2. **Closed Session with the Board**

Ron gave a head's up to the group that Neil Bodine will be providing facilitation with the Board of Trustees in closed session on June 22, 2004. The purpose of the facilitation is assist the Board in identifying their interests with regard to current discussions to develop a new income formula.

3. **FERC** (item closed)

Revised SCFA collective bargaining agreement articles #s 10 and 11 were signed today. New language will be effective immediately.

4. **Post '94 Contract Language** (pending)

Language needs to be the same for both FUSE and SCFA contracts.

Sierra Joint Community College District  
 Collective Bargaining  
 FY 2003-2004  
 Schedule 2  
 Dean's Council Meetings

Name	7.17.03	7.24.03	8.7.03	9.4.03	9.11.03	9.18.03	9.25.03	10.2.03	10.16.03	10.23.03	10.30.03	11.20.03
Allbee, Neal	0.10	0.30			0.40	0.80	0.70	0.30	0.30	0.30	1.50	1.50
Brazil, Donna												
Cunningham, Ray		0.30				0.80						
Davies, Mandy	0.10		0.20	0.70	0.40	0.80		0.30	0.30	0.30	1.50	1.50
DeCourten, Frank	0.10	0.30		0.70	0.40	0.80		0.30	0.30	0.30	1.50	1.50
Dollesin, Ninette	0.10	0.30		0.70	0.40	0.80	0.70		0.30			
Epting-Davis, Carla		0.30	0.20	0.70	0.40		0.70		0.30		1.50	
Guevara, Stephanie			0.20						0.30		1.50	1.50
Green, Dolly												
Haley, Brian		0.30		0.70	0.40	0.80		0.30	0.30	0.30	1.50	1.50
Jackson, Darlene	0.10		0.20	0.70	0.40	0.80	0.70	0.30		0.30	1.50	1.50
Kalina, Michelle				0.70	0.40		0.70					
Kleinbach, Mary				0.70	0.40	0.80	0.70	0.30		0.30	1.50	1.50
Lee, Lawrence		0.30	0.20									
Leland, Jean												1.50
Ludusky-Taylor, Tina		0.30	0.20	0.70	0.40		0.70	0.30	0.30	0.30	1.50	1.50
Lynn, Morgan	0.10			0.70	0.40	0.80	0.70	0.30	0.30	0.30	1.50	1.50
Mackey, Jennifer												
Martinez, Ron	0.10	0.30	0.20	0.70	0.40	0.80	0.70	0.30			1.50	1.50
McKnight, Diane	0.10	0.30			0.40	0.80	0.70	0.30		0.30	1.50	1.50
Nunnally, Delecia	0.10	0.30	0.20	0.70	0.40			0.30	0.30	0.30	1.50	
Roberts, Millie												
Schneider, Greg												
Schwenk, Lonnie		0.30										
Scott, Sandra		0.30	0.20	0.70	0.40	0.80	0.70		0.30	0.30	1.50	1.50
Sklarew, Jackie	0.10	0.30		0.70	0.40	0.80			0.30	0.30	1.50	1.50
Smith, Doug	0.10	0.30	0.20		0.40			0.30			1.50	1.50
Snyder, Scott												
Thiers, Laurie	0.10	0.30	0.20	0.70	0.40	0.80	0.70		0.30			
Tsuji, Bill			0.20	0.70	0.40	0.80	0.70	0.30	0.30	0.30	1.50	1.50
Volek, John	0.10	0.30		0.70	0.40	0.80	0.70	0.30	0.30	0.30	1.50	1.50
Walters-Dunlap, Karen	0.10	0.30	0.20	0.70	0.40	0.80	0.70	0.30	0.30	0.30	1.50	1.50
White, Margeret			0.20		0.40	0.80	0.70	0.30		0.30	1.50	1.50
Wilson, Woodrow		0.30	0.20		0.40		0.70		0.30		1.50	1.50
Wollesen, Mary												

Name	12.11.03	2.5.04	2.12.04	2.26.04	3.4.04	3.18.04	4.1.04	4.22.04	5.6.04	5.13.04	5.27.04	Totals
Allbee, Neal	0.30	0.20	0.90	0.80	0.20	0.30	0.70	0.20	0.20	0.30	0.70	11.00
Brazil, Donna				0.80								0.80
Cunningham, Ray		0.20	0.90	0.80	0.20							3.20
Davies, Mandy		0.20	0.90	0.80	0.20	0.30	0.70	0.20	0.20	0.30	0.70	10.60
DeCourten, Frank	0.30		0.90	0.80	0.20		0.70			0.30	0.70	10.10
Dollesin, Ninette							0.70			0.30		4.30
Epting-Davis, Carla		0.20	0.90	0.80	0.20	0.30	0.70				0.70	8.20
Guevara, Stephanie	0.30	0.20	0.90	0.80		0.30		0.20	0.20	0.30	0.70	7.10
Green, Dolly			0.90									0.90
Haley, Brian		0.20	0.90	0.80	0.20	0.30	0.70			0.30	0.70	10.20
Jackson, Darlene	0.30	0.20	0.90	0.80		0.30	0.70	0.20	0.20	0.30	0.70	11.10
Kalina, Michelle												1.80
Kleinbach, Mary		0.20	0.90	0.80	0.20	0.30	0.70	0.20			0.70	10.20
Lee, Lawrence												0.50
Leland, Jean	0.30		0.90	0.80								3.50
Ludutsky-Taylor, Tina	0.30		0.90	0.80	0.20	0.30	0.70					7.50
Lynn, Morgan	0.30	0.20	0.90	0.80	0.20			0.20	0.20	0.30	0.70	10.40
Mackey, Jennifer				0.80								0.80
Martinez, Ron	0.30	0.20	0.90	0.80	0.20	0.30		0.20	0.20		0.70	10.60
McKnight, Diane	0.30	0.20	0.90	0.80		0.30	0.70	0.20	0.20	0.30	0.70	10.50
Nunnally, Delecia	0.30	0.20	0.90	0.80					0.20			6.50
Roberts, Millie				0.80	0.20							1.00
Schneider, Greg				0.80								0.80
Schwenk, Lonnie				0.80								0.30
Scott, Sandra		0.20		0.80					0.20	0.30	0.70	8.90
Sklarew, Jackie	0.30											4.70
Smith, Doug			0.90	0.80	0.20		0.70					7.20
Snyder, Scott				0.80								0.80
Thiers, Laurie												3.50
Tsuji, Bill	0.30	0.20	0.90	0.80	0.20	0.30	0.70	0.20	0.20	0.30	0.70	11.50
Volek, John	0.30	0.20	0.90	0.80	0.20			0.20	0.20	0.30	0.70	10.70
Walters-Dunlap, Karen	0.30	0.20	0.90	0.80		0.30	0.70			0.30	0.70	11.00
White, Margeret	0.30		0.90	0.80	0.20		0.70		0.20	0.30		8.00
Wilson, Woodrow		0.20		0.80			0.70					1.50
Wollesen, Mary				0.80								0.80



Dean's Council - July 17, 2003

Start: 10:24  
End: 10:31

0.1 AC

Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

Names

<u>John Vohk</u>	_____
<u>Frank DeCourter</u>	_____ <u>PHRS?</u>
<u>Karen Walters Dunlap</u>	_____ <u>SKI crew, Jackie</u>
<u>Barlene Jackson</u>	_____ <u>FORKUM, Jim</u>
<u>Neal Allbee</u>	_____
<u>Delecia Munnally</u>	_____
? <u>Joseph Shlan</u>	_____
<del>_____</del> (Ron Martinez)	_____
<u>Doug Smith</u>	_____
<u>Shirley Thiers</u>	_____
<u>Diane McLaughlin</u>	_____
<u>Yvette Roberson (Dollesini)</u>	_____
<u>Mandy Davies</u>	_____
<u>Morgan Lynn</u>	_____
_____	_____

Individual Activities Time Log for Mandated Costs of  
**961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 03-04  
2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs = SWS

916 781-0543

12mo/11mo/10mo/hrly  
 Work year length

Dept. & Location #

Telephone #

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
7/17/03	Deans' Council Meeting And	SCFA	6 min		
1/1	Discussions of Negotiation	FUSE	-0-		
1/1	MEETINGS				
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature Mary Klenzsch Date 7-21-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

15 min (0.3)

DATE 7-24-03

- Brian Haly
- Don Smith
- M. W. Wilson
- Debra Munnally
- Neal Aarbae
- John Volek
- Sandra Scott
- Lawrence Lee (Lawrence)
- Fay Cunningham
- David Thiers
- ? Jaclyn Skvarzew
- Shirley Collier
- J. Luditsky (Luditsky-Taylor, Tina)
- Diane Mangiat
- Karen Walters Dunlap
- Lonnie Schwenk

Carla Epling-Davis  
Frank DeCorte  
Ralph Mantz

Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: SIERRA COLLEGE

Fiscal Year: 03-04  
2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs: SWS

916 781-0543

12mo/11mo/10mo/hrly  
Work year length

Dept. & Location #

Telephone #

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
7/24/03	Deans' Council Meeting And	SCFA	10 Min		
1/1	Discussions of Negotiation	FUSE	5 Min		
1/1	MEETINGS				
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
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Employee Signature Mary Klenzich Date 2-24-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.2

DATE AUGUST 7, 2003

Paul Shiro

Woody Wilson

JIM FORKUM FOR JOHN VOLEK

DOUG SMITH

Maggie Shea (Maggie White)

Sandra Scott

Karen Walter Dunlop

Laurence Bel (Lee)

Stephane Guevara

S. Tulevsky-Kifer

Lee M. Tsuji

Stephanie Guevara (Stephanie Guevara)

Mandy Davies

Delecia Munnally

Carla Epting-Davis

(Carla Epting-Davis)

Ron Martinez

(Ron Martinez)

Individual Activities Time Log for Mandated Costs of  
**961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 03-04  
~~2002-2003~~

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs = SWS

916 781-0543

12mo/11mo/10mo/hrly  
 Work year length

Dept. & Location #

Telephone #

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
8/7/03	Deans' Council Meeting And	SEFA	10 Min		
1/1	Discussions of Negotiation	FUSE	-0-		
1/1	MEETINGS				
1/1					
1/1					
1/1					
1/1					
1/1					
1/1					
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Employee Signature Mary Klein Date 8-19-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.7

DATE SEPTEMBER 4, 2003

Morgan Lynn Laurel Thiers  
Mandy Davies (Mandy Davies) Mary Klein-Birk  
Tina Ludutsky-Taylor (Tina Ludutsky-Taylor)  
Paul M. Tsuji  
Ron Martinez (Ron Martinez)  
John Volite  
Karen Walters Dunlap  
Frank De Courtois  
Sandra Scott  
Brian Haley  
Delecia Munnally  
Jocelyn Splainer  
Carla Epting-Davis (Carla Epting-Davis)  
Deidre J. Gorman  
M. Kalina  
Ninette Dollesin (Ninette Dollesin)

Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: SIERRA COLLEGE

Fiscal Year: 03-04  
~~2002-2003~~

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
9/4/03	Deans' Council Meeting And	SCFA	10 Min		
1/1	Discussions of Negotiation	FUSE	30 min		
1/1	MEETINGS				
1/1					
1/1					
1/1					
1/1					
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Employee Signature Mary Klenz Date 9-4-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_



Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.4

DATE 9-11-03

Morgan Lynn	Maggie Shea (white)
Monroe Davis	Marlene Jackson
Yvette Goltson	Shirley Thiers
Bill Gyi (Bill Tsvji)	Michelle Kalina
Diane McLaughlin	R. Dudutsky
Sandra Scott	Mary Klenz
Brian Haley	
Neal Albee	
Will Mays	
John F. Volek	
Delecia Munnally	
John Allen	
Chelle G. D. (Carla Epting Davis)	
D. Smith	
Karen Walters Dunlop	
Frank De Courten	

Individual Activities Time Log for Mandated Costs of  
**961/75 Collective Bargaining**

03-04

District: SIERRA COLLEGE

Fiscal Year: ~~2002-2003~~

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs: SWS

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
9/11/03	Deans' Council Meeting And	SCFA	15m		
1/1	Discussions of Negotiation	FUSE	10m		
1/1	MEETINGS				
1/1					
1/1					
1/1					
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Employee Signature Mary Klemsch Date 9-11-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.8

DATE SEPTEMBER 18, 2003

Laurel Thiers  
Diane McLanight  
Audene Jackson  
Karen Walters Danlap  
Frank De Courk  
Joann Allen  
~~Jim Martinez~~ (Don Martinez)  
Andrea Scott  
Neal Albee  
Ray Cunningham  
B. Haley  
John Volek  
Bill Guzzi  
Nenette Dolbin  
Mandy Davies  
Morgan Syman

Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: SIERRA COLLEGE

Fiscal Year: 03-04  
2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs.

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
9/18/03	Deans' Council Meeting And	SCFA	30M		
1 / 1	Discussions of Negotiation	FUSE	15M		
1 / 1	MEETINGS				
1 / 1					
1 / 1					
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Employee Signature Mary Klemm Date 9-18-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.7

DATE SEPTEMBER 25, 2003

Morgan Spivey (Morgan Lynn)

Yvette Collier

Bill Tsuji

Karen Walter Dwyer

Maggie White

Carla Epting-Davis (Carla Epting-Davis)

Neal Albee

John Volch

Tina Ludutsky-Taylor

Tina Ludutsky-Taylor (Tina Ludutsky-Taylor)

James McLaughlin

Shirley Jackson

Michelle Kellera

Sandra Scott

Laurel Thiers

Mary Kewenich

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
9/25/03	Deans' Council Meeting And	SCFA	20M		
1/1	Discussions of Negotiation	FUSE	20M		
1/1	MEETINGS				
1/1					
1/1					
1/1					
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Employee Signature Marg Kleinsch Date 9-25-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.3

DATE OCT. 2, 2003

Morgan Dupon

Neal Allbee

Marlene Jackson

Tina Ludutsky-Cough (Tina Ludutsky-Taylor)

Karen Walters Dunlap

Frank De Courde

Dany Smith

Br. Hately

Mandy Ellis (Mandy Davies)

Diane McBurnight

Brie (Suzi)

Deleah Munnally

John F. Volek

Rod Martinez (Ron Martinez)

Mary Kleinbach

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs.

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
10/2/03	Deans' Council Meeting And	SCFA	10 M		
1/1	Discussions of Negotiation	FUSE	10 M		
1/1	MEETINGS				
1/1					
10/2/03	PRE-TRAINING Review with	SCFA	1 Hour		
1/1	Members of Deans' Council (Prior				
1/1	to scheduled TRAINING SESSION w/				
1/1	Faculty in OCT.) BY George				
1/1	Holt, Alesa Schacter and John				
1/1	Bukey.				
1/1					
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Employee Signature Mary Klewosh Date 10-2-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_



Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.3

DATE 10/14/03

Morgan Lynn (Morgan Lynn)

Tina Ludutsky Taylor (Tina Ludutsky-Taylor)

Ninette Dollesin (Ninette Dollesin)

Rich Tsuji

Sandra Gott

Brian Haley

Neal Allbee

Carla Epting-Davis (Carla Epting-Davis)

Debra Munnally

Donna Shlain

Ron Martinez (Ron Martinez)

Mandy Davies (Mandy Davies)

Frank DeCoud

John F. Volch

Laurel Thiers

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs : Svcs

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
10/16/03	Deans' Council Meeting And	SCFA	10 Min		
1 / 1	Discussions of Negotiation	FUSE	5 Min		
1 / 1	MEETINGS				
1 / 1					
1 / 1					
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Employee Signature Mary Kleinfeth Date 10-16-03

If you have any questions, please contact (ABOVE) at 781-0543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.3

DATE OCT. 23, 2003

Morgan Lynn

Mary Kleinsach

Wendy Paine

Bill Swazi

Maggie White

Dianne McKnight

Neal Allbee (Neal Allbee)

Doug Smith

Carla Epting-Davies (Carla Epting-Davies)

Bryan Halley

Tina Ludutsky-Taylor (Tina Ludutsky-Taylor)

John F. Volek

Deann Allen

Debra J. Nunnally

Karen Waters Dunlap

Frank De Custer

Madeline Jackson

Paucina Scott

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
10/23/03	DEANS' COUNCIL MEETING AND	SCFA	10 Min		
1 / 1	DISCUSSIONS OF NEGOTIATION	FUSE	5 Min		
1 / 1	MEETINGS				
1 / 1					
1 / 1					
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Employee Signature Mary Klenzsch Date 10-23-03

If you have any questions, please contact ABae at 781-0543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

1.5

DATE OCT. 30, 2003

Morgan Lynn  
S. Sudatsky-Garfu  
Bill Grijalva  
Nancy Dalio  
Diane McLaughlin  
Maggie White  
Neal Allbee  
John F. Volek  
Doug Smith  
~~Ronald Martinez~~ (Ron Martinez)  
Carla Epting-Davis (Carla Epting-Davis)  
Sandia Scott  
Bryan Haley  
Frank DeCoster  
Karen Walter Dunlop  
Arlene Jackson

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs.

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
10/30/03	Deans' Council Meeting And	SCFA	1 HR		
1 / 1	Discussions of Negotiation	FUSE	30 Min		
1 / 1	MEETINGS				
1 / 1					
1 / 1					
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Employee Signature Mary Klembach Date 10/30/03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

15

DATE NOVEMBER 20, 2003

Morgan Lynne	Karen Watts Dunlap
J. Ginditsky	Prady Dira
Bruce Fung	Mary Klemsich
Margie Price	
Audra Scott	
Shanne Leland	
Br Hakey	
Neal Wallace	
Dave Smith	
<del>Mu [unclear]</del>	
James Aklan	
Expensive Gues	
John F. Volek	
Diane McLaughlin	
Stephane Jackson	
Frank DeCorte	

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs : Svcs

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
11/20/03	Deans' Council Meeting And	SCFA	1 HR		
1 / 1	Discussions of Negotiation	FUSE	30 min		
1 / 1	MEETINGS				
1 / 1					
1 / 1					
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Employee Signature Mary Kleinrich Date 11-21-03

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_



Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

03

DATE DEC. 11, 2003

Morgan Jones  
Ann Dudzicky Oberlin

Bill M. Guiz

Massie Shira

MI Meyer (Ron Martinez)

Jean Leland (Jean Leland)

Deleah Munnally

John F. Volch

Ann Olson

Edna Green

Neal Allbee

Angela D. Saito

Frank DeCristo

Karen Waters Dantap

Diane McAnight

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
12/11/03	Deans' Council Meeting And	SCFA	15 min		
1 / 1	Discussions of Negotiation	FUSE	5 min		
1 / 1	MEETINGS				
1 / 1					
1 / 1					
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Employee Signature Mary Klemmich Date 12-11-03

If you have any questions, please contact Mary at X2543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.2

DATE FEB. 5, 2004

Morgan Ryan

Mary Klemm

(Ray Cunningham)

~~Ray Cunningham~~

(Ron Martincz)

Antony

Mary Ann

John F. Volik

Carla Epting-Davis

(Carla Epting-Davis)

M. Woodrow Wilson

Neal Allbee

Delecia Munnally

Sydney Green

Bake Haley

Dulene Jackson

Karen Walters Dunlop

Andrea Scott

Diane Melnick

Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs.

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
2/5/04	Deans' Council Meeting And	SCFA	5mc		
1/1	Discussions of Negotiation	FUSE	5mc		
1/1	MEETINGS				
1/1					
1/1					
1/1					
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EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature Mary Kleinzieh Date 2-5-04

If you have any questions, please contact Mary at X2543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.9

DATE FEBRUARY 12, 2004

Morgan Chapman

Frank DeCristo

Mary Davis

Diane McLaughlin

Brian Tuzi

Amy McPhee

John F. Volek

Mary Klenck

Dan Smith

B. Haley (Brian Haley)

Neal Albee

Stephanie Guevara (Stephanie Guevara)

Margaret Price

Carla Epting Davis (Carla Epting Davis)

Illene Heland

Ron Martinez (Ron Martinez)

Patricia Annally

Ray Cunningham (Ray Cunningham)

Andrew Jackson

Karen Walters Dunlavy

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
2/12/04	Deans' Council Meeting And	SCFA	10min		
2/12/04	Discussions of Negotiation	FUSE	45min		
1 / 1	MEETINGS				
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**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature Mary Klenzler Date 2-12-04

If you have any questions, please contact Mary at X 2543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
 For Deans' Council Activities  
 Time Log for Mandated Costs of  
 961/75 COLLECTIVE BARGAINING

(D.B)

DATE 2-26-04

Morgan Lynn	Brittany
Jan Smith	Janice McLaughlin
Maggie Kitee	Karen Walters Denton
Delecia Munnally	Jennifer Mackey (Mackey)
Millie Roberts	Chela G. G. (Epling-Davis)
Suzanne Brown	Omna Bray (Brazil)
Aulone Jackson	Neal Albee
Ray G. (Mandy Davis)	Ray Cunningham (Ray Cunningham)
M. Woodrow Wilson	John F. Volcik
Greg Schneider	Frank De Court
Mary Wollesen	Br. Hakey
Scott Snyder	Bruce Lopez X
? <del>Phil Yorde</del> Phil Yorde	Andrea Scott
? Jennifer Powers Jan Powers	Cheryl Gammert ?
Rom Hartman	Mary Klenzich
Thelma Ireland	

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
2/26/04	Deans' Council Meeting And	SCFA	5min		
2/26/04	Discussions of Negotiation	FUSE	45min		
1/1	MEETINGS				
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Employee Signature Mary Kensch Date 2-26-04

If you have any questions, please contact MARY at X254B

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_



Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.2

DATE 3-4-04

Thelma Roberts

Neal Albee

Maggie Price

Frank DeSaut

Morgan Ryan

Mandy Davies

Bill Gwin

Brittany

John Volek

Dawn Smith

Paula [unclear]

(Epting-Davis)

[unclear]

(Ray Cunningham)

[unclear]

(Ron Martinez)

Nancy Kleau

Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs

916 781-0543

12mo/11mo/10mo/hrly 0

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
3/4/04	Deans' Council Meeting And	SCFA	0		
1/1	Discussions of Negotiation	FUSE	10 min		
1/1	MEETINGS				
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Employee Signature Mary Klenzsch

Date 3-14-04

If you have any questions, please contact Mary at X2543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

03

DATE March 18, 2004

Joni Dudetsky Gayle

Karen Walters Dunlap

Bhanie Givens

Shelene Jackson

Shelene Jackson (EPTING-DAVIS)

Neal Allbee

Brian Haley

Diane McEnright

Rui Tsuji

M. Martinez (Martinez)

Mary Davis

Mary Klemm

Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
3/18/04	Deans' Council Meeting And	SCFA	15 min		
1/1	Discussions of Negotiation	FUSE	5 min		
1/1	MEETINGS				
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Employee Signature Mary Klenbach Date 3-18-04

If you have any questions, please contact Mary at X 2543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.7

DATE 4-1-04

- ~~Karen Walters Dunlap~~
- ~~Manda DeCorte~~
- Arlene Jackson
- Brian Haley
- Yvonne Dollesin (Dollesin)
- Travis McLaughlin
- Cheryl Epting-Davis (Epting-Davis)
- Neal Allbee
- Maggie Stone
- Doug Small
- Joyce Jones
- Patricia Grijzi
- Mandy Davis
- Gene Andrews-King
- Mary Klein

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs.

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
4/1/04	Deans' Council Meeting And	SCFA	20 min		
1/1	Discussions of Negotiation	FUSE	20 min		
1/1	MEETINGS				
1/1	Collective Discussion				
1/1	of both units (20 min				
1/1	only)				
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Employee Signature Mary Kleusied Date 4-1-04

If you have any questions, please contact Mary at X2543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Signatures were not obtained last week at Deans' Council. Please sign next to your name to document a 10 minute brief review of negotiation discussions. Thanks.....m

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.2

DATE APRIL 22, 2004

Neal Allbee

*Neal Allbee*

Carla Epting-Davis

Mandy Davies

*Mandy Davies*

Ninette Dollesin

Stephanie Guevara

*Stephanie Guevara*

Darlene Jackson

*Darlene Jackson*

Michelle Kalina

Morgan Lynn

*Morgan Lynn*

Ron Martinez

*Ron Martinez*

Diane McKnight

*Diane McKnight*

Doug Smith

Bill Tsuji

*Bill M. Tsuji*

John Volek

*John Volek*

Maggie White

Mary Kleinbach

*Mary Kleinbach*

Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs.

916 781-0543

12mo/11mo/10mo/hrly  
Work year length

Dept. & Location #

Telephone #

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
4/22/04	Deans' Council Meeting And	SCFA	5 Min.		
1 1	Discussions of Negotiation	FUSE	5 min		
1 1	MEETINGS				
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Employee Signature Mary Kleinsch Date 4-22-04

If you have any questions, please contact Mary at x2543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_



Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.2

DATE May 6, 2004

- Morgan Ryan
- MARION DAVIES
- Bill Tsujin
- M. Martinez (Martinez)
- Margaret White (White)
- Neal Allbee
- John F. Volch
- Deleena Munnally
- Dianne McLaughlin
- Audene Johnson
- Denise Guzman
- Sandra Scott

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs = Svcs.

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
5/6/04	Deans' Council Meeting And	SCFA	10min		
1/1	Discussions of Negotiation	FUSE	0		
1/1	MEETINGS				
1/1					
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Employee Signature Mary Klenoth Date 5-7-04

If you have any questions, please contact Mary at X2543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.3

DATE 5-13-04

- Morgan Lynn
- Sheryl (Mandy Davies)
- Neal Allbee
- Maggie St. Luce
- Michelle L. Foltz (Dollesin)
- Bruce T. King
- Stephanie Guiraud
- Maureen Jackson
- Diane McInright
- Frank DeCristo
- Karen Waters Dunlop
- Amanda Scott
- Brian Haley
- John Volk

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs.

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
5/13/04	Deans' Council Meeting And	SCFA	10. Min		
5/13/04	Discussions of Negotiation	FUSE	5 Min		
1 / 1	MEETINGS				
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Employee Signature Mary Klenz

Date 5-13-04

If you have any questions, please contact Mary at X2543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

0.7

DATE MAY 27, 2004

Espinoza (Guevara) (Guevara)  
Andrew Scott  
Morgan Lynn  
Brian Haley  
Debbie Jackson  
Frank D. Carter  
Karen Watts Downey  
Diane Melanight  
John F. Volch  
Neal Allbee  
Edna E. Davis (EPTING-DAVIS)  
Billie T. Torgio  
Mandy  
Nancy Davis (MANDY DAVIES)  
Mary Klein Bach

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs.

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
5/27/04	Deans' Council Meeting And	SCFA	30M		
1/1	Discussions of Negotiation	FUSE	10M		
1/1	MEETINGS				
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Employee Signature Mary Klenz Date 5-27-04

If you have any questions, please contact Mary at X2543

PLEASE SUBMIT THIS INFORMATION BY 0 to \_\_\_\_\_

Joint Labor Management Committee Meetings (NC)

Date	Drennon, Sue	Green, Dolly	Lee, Lawrence	Leland, Jeanne	Martinez, Ron	Smith, Doug	White, Margaret	Wickstrom, Robert	Yamamoto, Craig
8.20.03	3.00			3.00	3.00				
9.18.03	2.00			2.00	2.00	2.00	2.00	2.00	
12.11.03	1.80		1.80	1.80	1.80	1.80	1.80		
2.12.04	1.80		1.80	1.80	1.80	1.80	1.80		
3.10.04			1.80		1.80	1.80			
3.15.04			3.50	3.50	1.00	3.50			3.50
3.19.04			1.50		1.50				
4.16.04		2.00	2.00	2.00					
4.30.04		1.50	1.50		1.50				
5.5.04			2.00	2.00	2.00	2.00			
5.14.04		1.50	1.50	1.50					
<b>Totals</b>	<b>8.60</b>	<b>5.00</b>	<b>17.40</b>	<b>17.60</b>	<b>16.40</b>	<b>12.90</b>	<b>5.60</b>	<b>2.00</b>	<b>3.50</b>

JOINT LABOR MANAGEMENT COMMITTEE – RECOLLECTIONS

AC

Date: August 20, 2003  
Time: 9:00 A.M.-12:00 P.M.  
Place: L-193

3.0

**Members Present:**

Classified: Shari Newman, Tim Kyle, Jory Hadsell  
Faculty: Deb Sutphen, Winsome Jackson  
District: Ron Martinez, Jeanne Leland, Sue Drennon, John Bukey (facilitator)  
Management: Mag gie White  
Retirees: Leland Mansuetti, Linda Hansen  
Absent: Doug Smith, Luis Sanchez  
Guests: Dennis Lee

**1. 2004 Medical Renewal Presentation**

Dennis Lee of Lee Insurance Services provided the JLMC with 2004 Medical plan renewal rates and options for actives and retirees (binder handouts). The handout includes medical, vision, dental, Hartford (estimated rate), and US Scripts information. Dennis said Blue Cross and Health Net may bid. He stated that though these rates are increasing, they're not as high as expected (20+%). Renewal rates can be reduced by changing either prescription drug co-pays or plan deductibles. Dennis will get PPO quote for plan without chiropractic; the HMO does not provide chiropractic. Also, there are no other medical plans available in the Nevada County area.

W: JLMC

W: Each review the 2004 medical plan renewal rates and options

W: For discussion and selection in time to for open enrollment (October 1<sup>st</sup>)

Note: Shari stated that if the group opts to change plans, it will require ratification.

(Terminology: nm=no Medicare, m=Medicare, ooa=out of area, sa=senior advantage, capitation=\$ directly to doctors)

Dental – the group reached **consensus** to change rates as follows:

Plan 001 (\$1000) from \$60.00 to \$ 65.00

Plan 002 (\$1500) from \$85.00 to \$ 95.00

Plan 003 (\$2000) from 105.00 to \$135.00

Vision – Dennis presented a two year contract rate from VSP. The group requested a one year contract rate. Dennis will get a quote.

Ron suggested we look into vision and dental self insurance to remove the cost of a 3<sup>rd</sup> party administrator.



**JOINT LABOR MANAGEMENT COMMITTEE  
RECOLLECTIONS**

Date: September 18, 2003  
Time: 3:15-5:15 PM  
Place: L-193

2.0

**Members Present:**

Classified: Shari Newman, Tim Kyle, Jory Hadsell  
Faculty: Deb Sutphen, Winsome Jackson, Luis Sanchez  
District: Ron Martinez, Doug Smith, John Bukey (facilitator)  
          Jeanne Leland  
Management: Maggie White, Sue Drennon  
Retirees: Leland Mansuetti, Linda Hansen  
Guests: Dennis Lee, Cindy Green and Courtney Tran (Kaiser), Robert Wickstrom,  
          Shana Saichek (4:20-Post94 Trust Attorney)

**1. Pre-94 Fund**

The annual report on the status of the fund is due.

WWW: Doug, prepare and provide a status report of the fund, by email

**2. 2004 Medical Renewal Presentation**

**Kaiser –**

Cindy Green provided handouts (binder) of Kaiser rates for 03-04. Cindy reminded the group of the existing expansion of coverage or out-of-area eligibility for those employees who do not live in the area. There is a live or work provision that if those employees, currently working and under the age of 65, at NCC, for example, are willing to drive to Kaiser services, they can enroll with Kaiser. There are some exclusions of service (i.e. no home health services or deliverable durable medical equipment).

WWW: Cindy, provide a list of excluded services for out-of-area service, asap

Group discussed Kaiser rates with regard to actives only. There may be some cost options with changes to co-pays for office visits and prescription drugs.

WWW: Cindy, provide estimated co-pay option matrix, for email vote

Note: Kaiser underwriting requires employer pays 100%. Rates cannot rise beyond the medical cap.

**Vision –**

Dennis Lee of Lee Insurance Services provided a one-year quote for VSP. The cost difference between the one and two-year was not significant and there is a risk that next year's quote could be higher. The group reached **consensus** to go with the two year vision cost quote previously quoted.

At the August 20, 2003 meeting Dennis provided the JLMC with 2004 Medical plan renewal rates and options for actives and retirees (binder handouts). The binder includes medical, vision, dental, Hartford (estimated rate), and US Scripts.

**JOINT LABOR MANAGEMENT COMMITTEE  
RECOLLECTIONS**

Date: December 11, 2003  
Time: 3:15-5:00 PM  
Place: L-193

(1.8)

Voting Members Present:

Classified: Shari Newman, Carolyn Warner  
Faculty: Winsome Jackson, Luis Sanchez, Deb Sutphen  
Management: Maggie White  
District: Ron Martinez, Doug Smith

Voting Members Absent:

Classified: 1 member to be named

Representatives/Resource/Guests:

John Bukey (facilitator), Cliff Burns (retiree), Lawrence Lee, Sue Drennon, Jeanne Leland, Dennis Lee, Jay Clem, Robert Bundbury

• **Check-In**

Doug stated that the Post '94 Trust will go into effect whether or not FUSE is able to ratify. It is preferred to go as one group. Board protocol and other provisions need to be worked out. Trust effective date will be determined when needed work is completed.

Cliff Burns had a question regarding the new Medicare legislation. He thought the requirement is that at age 65 you must choose either Medicare or private health care but you can no longer have both.

WWW: Dennis Lee, research Medicare question, report back.

**1. Beneflex Presentation (Robert Bundbury)**

Mr. Bundbury of Bundbury and Anderson provided handouts and a presentation to the group regarding regarding out Beneflex Plan. Beneflex (also known as a 125 plan or cafeteria plan) is an administrative procedure that allows employees to pay for eligible expenses with tax free wages. Recently certain over-the-counter products have been included in this benefit plan. Ron stated that only about 40 employees at Sierra are currently using this benefit. This is a tax saving benefit that needs to be communicated to staff. Mr. Bundbury will be asked to make a presentation to the various employee groups.

**3. Retiree Representation (pending)**

Linda Hanson said Chris Abood may be taking her place on the committee.

**4. Post-94 Trust (pending)**

FUSE membership requested a revised side letter of the original side letter that created the Post '94 Trust to incorporate it current design. They also requested a side letter of reassurance for the Pre '94 fund that the Pre and Post '94 funds are separate. Side letters JLMC 0304-01 and JLMC 0304-02 were signed today. These documents are to be

## JOINT LABOR MANAGEMENT COMMITTEE RECOLLECTIONS

Date: February 12, 2004  
Time: 3:15-5:00 PM  
Place: Fireside Room

1.8

### Voting Members:

Classified: Shari Newman, Carolyn Warner, one member to be named  
Faculty: Winsome Jackson, Luis Sanchez (absent), Deb Sutphen  
Management: Mag gie (White)  
District: Ron (Martinez) (facilitator), Doug (Smith)

### Representatives/Resource/Guests:

John Bukey (absent), Joyce Lopes, Lawrence (Lee), Sue (Drennon), Jeanne (Leland), Cliff Burns (absent), Linda Hanson (absent), Dennis Lee

### • **Check-In**

### Group Medical Plan Options

Dennis Lee provided handouts with an overview of medical plan options for consideration by JLMC and the subcommittee, as requested. Dennis explained the options and responded to questions from the group. Dennis will continue to provide information to both JLMC and the subcommittee, as needed. The goal is to have direction by the end of this semester. SCFA has appointed Luis Sanchez, Bill Pannell, and Steve Linthicum. FUSE appointments are pending. Once all members are identified, a meeting of the subcommittee will be scheduled.

### Post-94 Update

Elected and appointed Trustees for both FUSE need to be identified. SCFA has appointed Deb Sutphen and will identify their elected trustee by March 5<sup>th</sup>. District has identified its two trustees as Craig Yamamoto and Jeanne Leland. Trust attorney Shana Saichek will be coming to campus on March 15, time and place to be determined. She will finish the Trust document and present it to the committee (JLMC) for signature. She will prepare a list of implementation steps. All Trustees need to be present as well. Upon execution, the Trust will be ready for operation, needing only contributions to fund it.

### Off Agenda Items

- Ron reported receiving an email from an employee regarding fee erroneously charged fees by Blue Shield for prescribed home injectables. Sue Drennon verified that this was reported to her as a programming error by Blue Shield and that it would be corrected. The extent of the problem and its effect on our employees is not known.  
WWW: Sue, send an email to all staff regarding this issue, asap
- Dennis Lee responded to Cliff's question from a prior meeting regarding the new Medicare legislation and its effect on Sierra College retirees. Dennis stated that there would be no changes to the level of benefits for our retirees.

**JOINT LABOR MANAGEMENT COMMITTEE  
RECOLLECTIONS**

Date: March 10, 2004  
Time: 3:15-5:00 PM  
Place: Fireside Room

(1.8)

Voting Members:

Classified: Shari Newman (absent), Carolyn Warner, one member to be named  
Faculty: Winsome Jackson, Luis Sanchez (absent), Deb Sutphen (absent)  
Management: Mag gie White (absent)  
District: Ron Martinez, Doug Smith

Representatives/Resource/Guests:

John Bukey (facilitator), Joyce Lopes, Lawrence Lee, Dennis Lee

• **Check-In**

The purpose of today's meeting was to identify the members of the subcommittee and to give them their charge.

Group Medical Plan Options Subcommittee

The subcommittee members are as follows:

FUSE – Shari Newman (absent), Carolyn Warner, and John Lervold  
SCFA – Luis Sanchez (absent), Bill Pannell (absent), Steve Linthicum  
District – Joyce Lopes, Dolly Green, and Lawrence Lee

John Bukey facilitated today's meeting. Dennis Lee brought the group up to date regarding the history of the district's active medical plans. The group agreed to focus on the medical plans at this time and possibly review the dental and vision later. Joyce Lopes will convene future meetings for the subcommittee who agreed to meet on Friday mornings, time and place to be announced. The next meeting will be Friday, March 19, 2004. Judy McClymonds will serve as recorder.

Dennis will continue to provide information to both JLMC and the subcommittee, as needed. The goal is to have direction by the end of this semester.

• **Check-Out**

Meeting Schedule – 3:00-5:00 PM

Thursday, April 15 – L-193

Wednesday, May 5 – Fireside

**JOINT LABOR MANAGEMENT COMMITTEE  
RECOLLECTIONS**

Date: March 15, 2004  
Time: 9:00-12:30 PM  
Place: L-193

3.5

Voting Members

Classified: Shari Newman (absent), Carolyn Warner, and one member to be named  
Faculty: Winsome Jackson, Luis Sanchez (absent), Deb Sutphen  
Management: Mag gie White (absent)  
District: Ron Martinez (out 10:00), Doug Smith

1.0

Representatives/Resource/Guests:

John Bukey (facilitator), Lawrence Lee, Joyce Lopes (out 10:40), Shana Saichek

Post '94 Trustees

FUSE – Jeff Lloyd, \*Cyndie Birdsong  
SCFA – Deb Sutphen, Vicki Day  
Management - Craig Yamamoto, Jeanne Leland

**The purpose of today's meeting is to review the Post '94 documents and, if approved, pass them over to the Post '94 Trustees.**

• **Check-In**

At check-in Doug mentioned that other districts are looking to resolve their post-94 retiree benefit issues. The group felt there may be an opportunity to increase the membership of our trust with other community college districts. Shana has a PowerPoint presentation that might be helpful when the trustees are ready to consider enlarging the trust. She stated other groups can be charged a joiner fee/per person charge to recoup some of the expense incurred by the original group to set up the trust.

WWW: Jeanne, provide Shana with a list of trustees and their email addresses, after 3/17/04.

Shana presented the "Trust Agreement governing the Community College Employees Benefit Trust." She stated that this is the document that establishes the trust. It describes the duties, responsibilities, and the powers for the trustees. The trustee board can sue and/or be sued. The trust is separate from the college and the labor organizations. The Trustee Board manages the trust. The JLMC can amend the trust agreement to amend the Board.

The name of the trust was discussed. The name should be something that could relate to similar groups of employees. Administrative costs can be spread over a larger number if the trust grows. The name of the trust shall be: Community College Employees Benefit Trust. Trustees should attend trustee training. There is an organization that provides annual training sessions for trustees. Each employee group should have an alternate to

## JLMC BENEFITS SUBCOMMITTEE

Recollections  
March 19, 2004  
LRC 201

9-10:30 = (15)  
per doc  
request

Present: Lawrence Lee, Ron Martinez, Luis Sanchez, John Lervold, Steve Linthicum, Joyce Lopes, and Shari Newman

Absent: Dolly Green and Dennis Lee (Benefits Consultant)

### Recollections:

Recollections from the March 4, 2003, meeting were reviewed and approved.

### Meeting Times:

Future meeting dates were discussed and it was first agreed to meet every other Friday, except when it falls on Management Retreat days. However, after looking at the calendar, the next possible meeting date is Friday, April 16 at 9:00AM.

### Membership:

John Bukey can attend the meetings, if necessary. Dennis Lee, our benefits consultant, is on retainer as a resource. Carolyn Warner and Bill Pannell cannot serve on the committee, so there needs to be another faculty and classified rep, one preferably from NCC.

### Objectives/Calendar:

The charge of the committee is to look at medical options first and then work on dental. The committee agreed to leave the vision plan as it currently stands. Human Resources will collect medical benefit information for comparison purposes from Los Rios, Yuba, Delta and Butte Districts for the next meeting. Los Rios is self insured and their benefit cap is Kaiser.

### Committee's Objectives to be Completed by May:

- Identify the 3 best medical options (using John Lervold's grid - see attached) and give JLMC a proposal for the 2005 enrollment year by end of May
- Educate constituents before open enrollment in October

### Committee's Long-Term Objectives:

- Keep the committee focused on the long-term solutions as well as the short-term needs
- Research self insurance, evaluate the feasibility of joining a JPA
- Evaluate our current practices by proceeding with a survey to be prepared by John Lervold
- As we work toward a long-term solution, develop appropriate benefit administration focused on employee orientation
- Review our census data, demographics, and actuarial data, if appropriate
- Explore retiree options

## JLMC BENEFITS SUBCOMMITTEE

Recollections

April 16, 2004 - 9:00AM - 11:00

LRC 313

(2.0)

Present: Lawrence (Lee), Luis Sanchez, John Lervold, Joyce Lopes, Shari Newman, Dolly (Green), Eunis Benecke, Sonni Cooper, Bill Cole, Jeanne (Leland) on behalf of Ron Martinez, and Dennis Lee (Benefits Consultant)

Absent: Steve Linthicum and Ron Martinez

### Membership

Shari Newman will serve as an alternate member on 1  
Cooper will act as a classified representative, and it w  
could also represent part-time faculty. Eunis Benecke  
and Bill Cole is a new faculty representative. At the n  
several retirees in attendance.

end time?

9-11

per school

### Health Survey

John Lervold reported that 72% of staff completed their health survey. 25% of those staff need coverage only for themselves. Two insurance-related complaints from NCC staff are: 1) Kaiser is not an option for them, and 2) the pool of doctors in that area is too small. Many staff have requested that the survey results be shared. It was agreed to not only do this, but to talk about the subcommittee's charge and long-term goals.

### Timeline for the Upcoming Benefits Plan

The timeline for the subcommittee to make benefit recommendations to JLMC for the upcoming year is mid-May. It was agreed that the committee will look at health trends, other district health plans, and industry health plans for future recommendations to JLMC.

### Dennis Lee's Presentation

Dennis presented an overview of different types of health insurance. When Kaiser is involved, other carriers will not participate unless they have 50% of group coverage. Tiered/composite rates and opting out will be discussed later.

### JPA – Joint Powers Authority

- Our district can combine with other school districts to get certain plans
- Is a self-insured trust – you are the insurance company – you have budget and decide which claims you will pay
- CVT (Central Valley Trust) requires surcharge – protects integrity of the group, but loyal to own members not new people coming in
- To create a JPA, you need:
  1. An attorney
  2. By-laws
  3. 1-2 years to form a JPA

## JLMC BENEFITS SUBCOMMITTEE

Recollections

April 30, 2004 - 2:00PM - 3:30  
LRC 313 per doc request

1.5

Present: Eunis Benecke, Sonni Cooper, Dolly Green, Lawrence Lee,  
John Lervold, Joyce Lopes, Ron Martinez, Dennis Lee (Benefits  
Consultant) and Bill Cole

Absent: Luis Sanchez and Steve Linthicum

### Survey Results

John Lervold handed out the summary of the benefits' survey results (see attached). An informational email will be forwarded on to faculty and staff for their information.

### Blue Shield Presentation

A presentation of Blue Shield's medical benefits was given by their area district managers. It was explained to the Blue Shield presenters that there are several issues relating to NCC that need to be addressed:

1. NCC is outside of Kaiser's geographic area
2. Most physicians won't accept HMOs, so have to use PPO

Blue Shield prides itself on "affordable access to quality care." If you're covered by a PPO plan, you may visit any licensed doctor. In an HMO plan, you must select a physician or they assign one for you, and your physician will provide referrals and supervise all medical care.

#### Blue Shield HMO Advantages:

- Lower out-of-pocket expenses
- Lower office visit copays
- Lower hospital deductibles
- Virtually no claim forms

#### Blue Shield PPO Advantages:

- Freedom to visit preferred doctors
- The ability to go to any network specialist without a referral
- Choice of deductible
- When network providers are used, lower out-of-pocket expenses than when non-network providers are used

With the Active Choice Plan, Blue Shield gives you a \$500 or \$750 credit up front, depending on the plan, to use for covered professional services. You can rollover, up to \$750, any unused portion of your current year's credit to use



# SixTen and Associates Mandate Reimbursement Services

KEITH B. PETERSEN, President  
6252 Balboa Avenue, Suite 807  
San Diego, CA 92117

Telephone: (858) 514-3605  
Fax: (858) 514-3645  
E-Mail: kbpsixten@aol.com

### FAX TRANSMITTAL

1. Page(s) this memo  
5. Page(s) attachment

DATE:

**October 15, 2004**

FAX TO: Linda Fisher, Accounting Manager  
Sierra CGB  
(916) 781-0455

FROM: Diane Bramwell

CC: Robert Wickstrom

SUBJECT: Annual Reimbursement Claim  
Collective Bargaining  
FY: 03/04

**FAXED  
CONFIRMED  
SECOND  
REQUEST**

PLEASE RESPOND BY: ~~September 21, 2004~~

**November 5, 2004**

Thank you for submitting the balance of your legal billings. In order to process the above referenced claim, please provide the following information:

- 1) Copies of legal billings from Carney Badley Spellman for the months of service of July and August 2003 and June 2004 ~~NOT CALLED AS OF 11/2/04~~
- 2) Copies of legal billings from Johnson, Schachter & Lewis for the month of service of August 2003 (the description detail was missing from the copy that was sent)
- 3) Copies of billings from John Bukey
- 4) A copy of the invoice from Dennis Lee (a benefits consultant mentioned in several employee time logs) - ~~3/04 - 11/04~~ **2/04 - 11/04**
- 5) The ending times for the 3 attached JLMC Benefits Subcommittee meetings
  - a) March 18, 2004 **9:00 - 10:30**
  - b) April 16, 2004 **9:00 - 11:00**
  - c) April 30, 2004 **10:00 - 3:30**
- 6) The names of the 2 distinct staff members that are indicated with a star to the attached Deans Council meeting on February 25, 2004
- 7) The 2003-2004 Fiscal Year Productive Hourly Rates for all Sierra staff and specifically for the names listed below

**JOINT LABOR MANAGEMENT COMMITTEE  
RECOLLECTIONS**

Date: May 5, 2004  
Time: 3:00-5:00 PM  
Place: Fireside Room

20

Voting Members

Classified: Shari Newman, Carolyn Warner, and one member to be named  
Faculty: Winsome Jackson, Luis Sanchez (absent), Deb Sutphen  
Management: Maggie White (absent)  
District: Ron Martinez, Doug Smith

Representatives/Resource/Guests:

John Bukey (facilitator), Lawrence Lee, Joyce Lopes, Cliff Burns (retiree), Craig Yamamoto and Jeanne Leland (Post '94 Trustees-Management)

• **Check-In**

**1. Recollections – review of 4/15/04**

This is to clarify that none of the retiree representatives (recently increased to three) have JLMC voting rights.

**2. Medical Benefit Options Subcommittee**

Joyce Lopes reported that the subcommittee met several times. Along with working towards a recommendation, the group is learning about other options available for providing medical benefits (carrier, self-insurance, or a joint powers association (JPA)). Dennis Lee has been working with the subcommittee as a resource and providing this information.

Dennis will also provide the carriers with our group data at the end of the summer for bids. We won't know until August what our plan costs will be for 2005. One concern has been the difficulty of finding providers that will service the Grass Valley area. Blue Shield, Kaiser, and Blue Cross are the largest providers and with services in the Grass Valley area. Hartford and U.S. Scripts plans to remain the same for the coming year.

**Medical Benefits Subcommittee Recommendation – Stay with the current approach for the coming year, 2005 and look to broader solution next year - consensus to accept the subcommittee's recommendation.**

Subcommittee survey has a 75% response; this is obviously a "hot" issue. Most responses report willingness to consider higher co-pays and/or deductibles.

WWW: The JLMC requested that along with the subcommittee's memo to all staff regarding the survey results, it should also include information on the subcommittee's present status to include subcommittee's recommendation and approval by JLMC for 2005 and that the subcommittee will continue to gather information. Also, add that bid

**JLMC BENEFITS TASK FORCE**

Recollections

May 14, 2004 - 9:00 AM

LRC 313

-10:30 (from 4/30's notes)  
1.5

Present: Eunis Benecke, Sonni Cooper, Dolly Green, Lawrence Lee, Jeanne Leland (Guest), John Lervold, Steve Linthicum, Joyce Lopes, Luis Sanchez, and Dennis Lee (Benefits Consultant)

Absent: Bill Cole, Ron Martinez, and Cliff Burns (Retiree Rep)

**JLMC Survey Results**

Joyce met with the JLMC and presented the Task Force's recommendation to proceed with the carrier option for 2005. Health benefits survey results were presented to the JLMC and will be emailed by Ron Martinez to all full-time staff.

**Kaiser Presentation**

Ms. Cindy Green, Senior Accounting Executive for Kaiser presented an overview of the Kaiser Permanente organization. Kaiser is a not-for-profit medical service organization that has been in business over 55 years and consists of three integrated groups: Kaiser Insurance, Kaiser Hospitals, and Kaiser Medical Group. Kaiser emphasizes preventative medicine with health care decisions made by personal physicians. Administrative costs account for 14% of expenditures. Kaiser is part of the Community Care Network (CCN) and participates in the National Committee for Quality Assurance (NCQA) organization.

Ms. Green noted that Kaiser will be offering expanded portfolio options for 2005. Kaiser is concerned about shifting risk due to disparity between available medical plan costs (i.e., employees with high medical risks switch to Kaiser just because it is cheaper than another plan option such as Blue Shield).

Our premium rates are based on our usage of services – how often we use their services, the intensity of the services we use, and the relative use of corrective versus preventative health services. Currently, Kaiser uses a “fully creditable” group size of 1,000 participants (including dependents) to set rates. Since we have only 600 members our rates are calculated using a weighted average based on our 600 members' actual usage (~0.7) plus an average of 400 members (~1.1) in our geographical area resulting in a composite rating factor of about 0.9. Beginning in 2005, the creditable group size will be reduced to 500, which should help to reduce any rate increases.

Although NCC is outside of Kaiser's geographic service area, some limited coverage is available to Sierra College employees living in Nevada County and working at the Rocklin campus. Kaiser offers a PPO indemnity option for out-of-area employees, but it is expensive.

Sierra Joint Community College District  
 Collective Bargaining  
 F/Y 2003-2004  
 Schedule 4  
 Summary of Jeanne Leland's Time

Component 3			
Negotiations			
Date	NP Certificated	NP Classified	NP
7.15.03	1.50		
9.18.03	0.50		
9.24.03			2.00
9.24.03	0.50		
9.25.03	1.00		
9.25.03		0.50	
9.26.03			0.50
9.26.03		1.50	
9.26.03			1.50
9.30.03		1.00	
9.30.03	2.00		
10.2.03			2.00
10.3.03			1.50
10.3.03	1.00		
10.22.03	1.50		
10.22.03	2.00		
10.22.03		1.00	
11.12.03	1.50		
11.12.03			2.00
11.13.03			1.50
11.19.03		0.30	
11.25.03		4.00	
<b>Totals</b>	<b>11.50</b>	<b>8.30</b>	<b>11.00</b>

Key	NP	Negotiation Preparation
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**UNDATED COST TRACKING FOR I**  
Complete a separate form for each activity

Date: 9/24/03 Time: 12:15 - 2:15 (nearest 1/4 hour)

Parties Present: *Stanne Ireland*

Grievant's Name:

Description (include section of contract being discussed):  
*prep for Post 24 proposal*

Unions (circle one):  
 SCFA  FUSE

Activity Codes (circle one):

Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)

Please enter tracking information ASAP and forward to Judy McClymonds  
*Judy McClymonds*

**UNDATED COST TRACKING FOR I**  
Complete a separate form for each activity

Date: 11/25/03 Time: 4 hours (nearest 1/4 hour)

Parties Present: *Stanne Ireland*

Grievant's Name:

Description (include section of contract being discussed):  
*Fuse Negotiations for 11/19/03 + 11/24/03*

Unions (circle one):  
 SCFA  FUSE

Activity Codes (circle one):

Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)

Please enter tracking information ASAP and forward to Judy McClymonds  
*Judy McClymonds*

**UNDATED COST TRACKING FORM**  
Complete a separate form for each activity

10  
NF-cert


Date: 9/25/03	Time: 10-11 (nearest 1/4 hour)		
Parties Present: <u>James Ireland</u>			
Grievant's Name:			
Description (include section of contract being discussed): SCFA mtg prep			
Unions (circle one): <u>SCFA</u> FUSE			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds <u>Judy McClymonds</u>			

**UNDATED COST TRACKING FORM**  
Complete a separate form for each activity


10  
NF 0.5

Date: 9/24	Time: 9:30-10:00 (nearest 1/4 hour)		
Parties Present: <u>James Ireland</u>			
Grievant's Name: <u>Det. Saffron</u>			
Description (include section of contract being discussed): Post 9/24 mtg prep for proposal			
Unions (circle one): <u>SCFA</u> FUSE			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds <u>Judy McClymonds</u>			

I. UNDATED COST TRACKING FOR: NP  
 Complete a separate form for each activity 0.5

Date: 9/26/03	Time: 2:00 - 2:30 (nearest 1/4 hour)		
Parties Present: Sharon Lehmel			
Grievant's Name: Sharon Lehmel			
Description (include section of contract being discussed): Post 94 proposal			
Unions (circle one): SCFA <u>JUMC</u> FUSE			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds 			

I. UNDATED COST TRACKING FOR: NP  
 Complete a separate form for each activity 0.5

Date: 9/25/03	Time: 11:00 - 11:30 (nearest 1/4 hour)		
Parties Present: Sharon Lehmel w Brooke Oliver			
Grievant's Name: Sheila Dobbin			
Description (include section of contract being discussed): Discussion of administration job description and out-of-class pay			
Unions (circle one): SCFA <u>FUSE</u>			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds 			



INDATED COST TRACKING FOR: NP

Complete a separate form for each activity

1.5

Date: 9/26/03	Time: 11:50-1:20 (nearest 1/4 hour)		
Parties Present: Jillanne Belmont			
Grievant's Name:			
Description (include section of contract being discussed): Proposal, memo, board agenda Mem for preg4 PRMF withdrawals prep.			
Unions (circle one): SCFA <u>JLMC</u> FUSE			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	<u>NP</u>	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds Judy McClymonds			

INDATED COST TRACKING FOR: NP

Complete a separate form for each activity

1.5

Date: 9/26/03	Time: 10:15-11:45 (nearest 1/4 hour)		
Parties Present: Jillanne Belmont			
Grievant's Name:			
Description (include section of contract being discussed): Revision & prep for 7A Aut. 1, 3, 4			
Unions (circle one): SCFA <u>FUSE</u>			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	<u>NP</u>	District's Proposal
BU	Determining Bargain Unit	<u>NR</u>	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds Judy McClymonds			

**INDATED COST TRACKING FOR:** NP  
Complete a separate form for each activity

2.0

Date: 9/30/03	Time: 2 hours (nearest 1/4 hour)		
Parties Present:			
Jearne			
Grievant's Name:			
Description (include section of contract being discussed):			
recollections from 9/25/03			
Unions (circle one):			
<input checked="" type="radio"/> SCFA <input type="radio"/> FUSE			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds			

**INDATED COST TRACKING FOR:** NP  
Complete a separate form for each activity

1.0

Date: 9/30/03	Time: 1 hour (nearest 1/4 hour)		
Parties Present:			
Jearne beland			
Grievant's Name:			
Description (include section of contract being discussed):			
recollections for 9/17/03			
Unions (circle one):			
<input type="radio"/> SCFA <input checked="" type="radio"/> FUSE			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds			

INDATED COST TRACKING FOR. NP  
 Complete a separate form for each activity 1.5

Date: 10/3/03 Time: 1 1/2 hours  
 (nearest 1/4 hour)

Parties Present: *Janne heland*

Grievant's Name:

Description (include section of contract being discussed):  
*post 94 proposal*

Unions (circle one):  SCFA  FUSE  JMC

Activity Codes (circle one):

Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)

Please enter tracking information ASAP and forward to Judy McClymonds  
*Judy McClymonds*

INDATED COST TRACKING FOR. NP  
 Complete a separate form for each activity 2.0

Date: 10/2/03 Time: 2 hours  
 (nearest 1/4 hour)

Parties Present: *Janne heland*

Grievant's Name:

Description (include section of contract being discussed):  
*JMC - Pre 94  
 Draft Memo & Friday letter*

Unions (circle one):  SCFA  FUSE

Activity Codes (circle one):

Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)

Please enter tracking information ASAP and forward to Judy McClymonds  
*Judy McClymonds*

INDATED COST TRACKING FOR, NP  
Complete a separate form for each activity

INDATED COST TRACKING FOR, NP  
Complete a separate form for each activity

Date: 10/22/03 Time: 12-1:30 (nearest 1/4 hour)

Parties Present: Luis Sanchez, Deb. Stephen Winsome, Jackson, Ron Martinez, Tony Smith, Jeany Rodriguez

Grievant's Name: claimed

Description (include section of contract being discussed): SCFA draft side letter agreement for compensation formula

Unions (circle one): SCFA FUSE

Activity Codes (circle one):

Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)

Please enter tracking information ASAP and forward to Judy McClymonds

Date: 10/3/03 Time: 1 hour (nearest 1/4 hour)

Parties Present: Jeanne

Grievant's Name:

Description (include section of contract being discussed): SCFA negotiations

Unions (circle one): SCFA FUSE

Activity Codes (circle one):

Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)

Please enter tracking information ASAP and forward to Judy McClymonds

UNDATED COST TRACKING FOR  
Complete a separate form for each activity

NP

Date: 10/22/03	Time: 1 hour (nearest 1/4 hour)		
Parties Present: AA - Instruction and AA-SS			
Grievant's Name:			
Description (include section of contract being discussed): Class. Friction consent meeting w/ AAs. Article 26			
Unions (circle one): SCFA <u>FUSE</u>			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds <u>Judy McClymonds</u>			

UNDATED COST TRACKING FOR  
Complete a separate form for each activity

NP

Date: 10/22/03	Time: 2 hours (nearest 1/4 hour)		
Parties Present: Jillanne Belmont			
Grievant's Name:			
Description (include section of contract being discussed): SCFA draft collective prep & communications			
Unions (circle one): <u>SCFA</u> FUSE			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds <u>Judy McClymonds</u>			

I. UNDATED COST TRACKING FOR.  
Complete a separate form for each activity **NP**

Date: 11/12/03	Time: <del>1.5</del> 2 hours (nearest 1/4 hour)		
Parties Present:			
Grievant's Name: <u>Jeanne Ireland</u>			
Description (include section of contract being discussed): <u>post '94 plan analysis</u>			
Unions (circle one): <u>SCFA</u> FUSE			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds <u>Juan Ireland</u>			

639

I. UNDATED COST TRACKING FOR.  
Complete a separate form for each activity **NP**

Date: 11/12/03	Time: 1.5 hours (nearest 1/4 hour)		
Parties Present:			
Grievant's Name: <u>Jeanne Ireland</u>			
Description (include section of contract being discussed): <u>SCFA collections</u>			
Unions (circle one): <u>SCFA</u> FUSE			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds <u>Juan Ireland</u>			

UNDATED COST TRACKING FOR NP  
Complete a separate form for each activity

0.3

Date: 11/19/03	Time: 4:55pm - 5:10pm (nearest 1/4 hour)		
Parties Present: RON MARTINEZ, DOUG SMITH, SEANNE CELAND LEGAL COUNSEL JOHN BUKSEY & KEVIN RAMIREZ			
Grievant's Name: N/A			
Description (include section of contract being discussed): NEGOTIATIONS DEBRIEF WITH THE SUPERINTENDENT/PRESIDENT.			
Unions (circle one): SCFA <u>FUSE</u>			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	<u>NN</u>	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds			

Martinez .3 NP

UNDATED COST TRACKING FOR NP  
Complete a separate form for each activity

1.5

Date: 11/13/03	Time: 1:30 - 3:00 (nearest 1/4 hour)		
Parties Present: Shanne Beland			
Grievant's Name:			
Description (include section of contract being discussed): JMC Negotiations			
Unions (circle one): SCFA <u>FUSE</u>			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds			

**INDATED COST TRACKING FORM**  
 Complete a separate form for each activity

NP  
0.4

Date: 9/25/03 Time: 4:30pm - 4:52  
 (nearest 1/4 hour) 22 minutes

Parties Present: DOUG SMITH, RON MARTINEZ, JEANNE LEONARD, JANE MCKNIGHT, KEVIN RAMIREZ AND JOHN BRUKEY, LEGAL COUNSEL

Grievant's Name: N/A

Description (include section of contract being discussed):  
 NEGOTIATIONS SESSION DEBRIEF TO THE SUPERINTENDENT/PRESIDENT OF THE DISTRICT.

Unions (circle one):  
 SCFA FUSE

Activity Codes (circle one):

Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievar		
AT	Contract Train		
BU	Determining B		
ER	Electing Exclut		
IF	Fact Finding		
IM	Mediation		

Individual INPUTS

Please enter tracking information  
 David Sanchez

Mr. JDA' Complete  
 RM by NP

Date: 9/1/03

Parties Present: DOLLING GREENS LOGS

Grievant's Name: Dolly Green

Description (include section of contract being discussed):  
 Mtg w/ P/T Faculty re: issues & concerns w/in PE Dept. Consultant

Unions (circle one):  
 SCFA FUSE

Activity Codes (circle one):

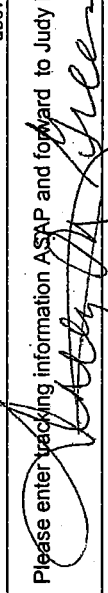
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)

Please enter tracking information ASAP and forward to Judy McClymonds  
 Judy McClymonds



**UNDATED COST TRACKING FORM**

Complete a separate form for each activity **AG 0.5**

<b>Date:</b> 10/1/03	<b>Time:</b> 1/2 Hr		
<b>Parties Present:</b>			
Dolly GREEN & Winsome Jackson			
<b>Grievant's Name:</b> MARVIN LINDVILLE			
<b>Description (include section of contract being discussed):</b> Phone Discussion w/ SCFA President Winsome Jackson regarding Marvin Lindville's issues re Auto Tech			
<b>Unions (circle one):</b>			
<input checked="" type="radio"/> SCFA <input type="radio"/> FUSE			
<b>Activity Codes (circle one):</b>			
<b>Code</b>	<b>Description</b>	<b>Code</b>	<b>Description</b>
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
<input checked="" type="radio"/> IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	<input checked="" type="radio"/> OO	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds			
			

Sierra Joint Community College District  
 Collective Bargaining  
 F/Y 2003-2004  
 Schedule 5  
 Summary of Ron Martinez's Time

Date	Component 3 Negotiations			Component 6 Contract Administration		Component 7 PERB
	NP Certificated	NP Classified	NP	AI	AG	UH
7.2.03		2.00				
7.7.03		1.00				
7.14.03		1.00				
7.29.03		2.00				
8.4.03		1.00				
8.7.03		1.00				
8.20.03		0.50				
8.20.03		1.50				
9.2.03	2.00					
9.3.03	0.50					
9.3.03		3.00				
9.10.03		0.50				
9.10.03	1.00					
9.16.03					0.50	
9.16.03		1.50				
9.17.03					1.50	
9.17.03		0.50				
9.24.03		1.00				
9.25.03	3.00					
9.29.03		1.00				
9.29.03		2.00				
9.29.03		1.00				
9.29.03					1.00	
9.15.03	1.50					
9.30.03			1.00			
9.30.03	1.00					
10.1.03		1.00				
10.1.03					1.50	
10.2.03	2.00					
10.3.03	2.00					
10.9.03	2.00					
10.9.03		1.00				
10.10.03	2.00					
10.13.03		1.00				
10.20.03	1.00					
10.22.03	0.50					
10.22.03	0.50					
10.28.03	0.50					
10.28.03		0.50				
11.3.03		1.00				
11.5.03					1.00	
11.25.03		1.00				
11.25.03					1.00	
10.25.03					1.00	
12.1.03				0.50		

Sierra Joint Community College District  
 Collective Bargaining  
 F/Y 2003-2004  
 Schedule 5  
 Summary of Ron Martinez's Time

Date	Component 3			Component 6		Component 7
	NP Certificated	NP Classified	NP	Contract Administration		PERB
				AI	AG	UH
12.2.03					2.00	
12.10.03				2.00		
1.28.04		0.50				
1.29.04	0.50					
1.29.04					1.00	
2.2.04		1.00				
2.4.04		1.00				
2.4.04		0.50				
2.5.04	0.50					
2.9.04	0.50					
2.9.04		0.50				
2.11.04		0.50				
2.12.04	0.50					
2.17.04	0.50					
2.10.04				1.00		
2.23.04					1.00	
2.25.04		0.50				
2.26.04	0.50					
2.27.04			1.00			
3.1.04	1.00					
3.3.04		1.00				
3.3.04		0.50				
3.4.04	0.50					
3.8.04		1.00				
3.8.04			1.00			
3.10.04		0.50				
3.11.04	0.50					
3.12.04	4.00					
3.15.04			1.00			
3.16.04		1.00				
3.17.04		1.00				
3.17.04					1.00	
3.17.04		1.00				
3.18.04	0.50					
3.22.04		1.00				
3.24.04		0.50				
3.29.04		1.00				
3.29.04			1.50			
3.30.04	1.00					
4.12.04			1.00			
4.12.04		1.00				
4.15.04	0.50					
4.19.04		1.50				
4.19.04		1.00				
4.19.04		0.50				

Sierra Joint Community College District  
 Collective Bargaining  
 F/Y 2003-2004  
 Schedule 5  
 Summary of Ron Martinez's Time

Date	Component 3			Component 6		Component 7
	Negotiations			Contract Administration		PERB
	NP Certificated	NP Classified	NP	AI	AG	UH
4.20.04				0.50		
4.21.04		1.00				
4.22.04	0.50					
4.27.04		1.00				
4.29.04	0.50					
4.30.04			2.00			
5.5.04		1.00				
5.6.04	0.50					
5.12.04		0.50				
5.13.04	0.50					
5.17.04		1.00				
5.17.04		1.00				
5.20.04	0.50					
5.21.04		0.50				
5.25.04						3.00
5.26.04						
5.27.04	0.50					
6.16.04		0.50				
6.17.04		1.00				
6.17.04	0.50					
6.17.04		0.50				
6.23.04		0.50				
<b>Totals</b>	<b>34.00</b>	<b>51.50</b>	<b>8.50</b>	<b>4.00</b>	<b>12.50</b>	<b>3.00</b>

Key		
NP		Negotiation Preparation
AI		Contract Interpretation
AG		Grievances
UH		PERB Hearings

Blackburn  
 DCB  
 -DFEH ISSUE

CB2.2

Individual Activities Time Log for Mandated Costs of  
 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2003-2004

Ron Martinez Associate Vice President, Human Resources  
 Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10mon./hrly  
 Dept. & Location Telephone #

X  
 others NP  
 X  
 DCB  
 NP  
 X  
 X  
 NP  
 X  
 NP

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
7/1/03	Called Attorney George Holt regarding retirees' benefits	SCFA	1/2 hrs	claimed on legal's	
7/2/03	Meet with Vance Jacobson regarding job descriptions	FUSE	2 hrs.		
7/7/03	Meet with Jill Simuro regarding job duties	FUSE	1 hr.		
7/14/03	Meet with Doug Smith & Ray Cunningham regarding Custodial and Transportation 1.0	FUSE	1 hr.		
7/16/03	Blackburn Deposition - Harry Avis deposed	SCFA	9 hrs.		
7/17/03	Meet with Carla Epting-Davis, Shari Newman, Delores McKenzie & Dolly Green regarding Delores' evaluation	FUSE	4 hrs.		
7/21/03	Blackburn Deposition prep for Kevin Ramirez	SCFA	5 hrs.		
7/23/03	Blackburn Deposition - Kevin Ramirez deposed	SCFA	5 hrs.		
7/29/03	Meet with Mandy Davies & Vance Jacobson regarding job descriptions 2.0	FUSE	2 hrs.		
7/29/03	Meet with Jill Simuro & Shari Newman regarding Jill's job duties	FUSE	1 hr.		
7/30/03	Blackburn Deposition - Kevin Ramirez deposed	SCFA	8 hrs.		
7/31/03	Meet with Tina Ludutsky-Taylor & Neal Allbee to discuss Heather McColgan	SCFA	1 1/2 hrs.		
8/4/03	Meet with Lawrence Lee, Vicki Reader & Jeanne Leland regarding 19-hour employees 1.0 ea	FUSE	1 hr.		
8/7/03	Meet with Lawrence Lee to discuss IIT reorg. 1.0	FUSE	1 hr.		
8/7/03	Meet with Jill Simuro, Shari Newman, Vicki Reader, and Bernard Acuna regarding Jill's job duties	FUSE	1 hr.		
8/20/03	Meet with Vance Jacobson regarding conversion	FUSE	1/2 hr.		
8/20/03	Meet with Jeanne Leland and Shari Newman regarding out-of-class pay 1.5	FUSE	1 1/2 hrs.		

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: Ron Martinez Date: 10/8/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2003-2004

Ron Martinez Associate Vice President, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
X	8/20/03 Blackburn Deposition prep	SCFA	5 hrs.		
X	8/22/03 Blackburn Deposition – Ron Martinez deposed	SCFA	9 hrs.		
X	8/27/03 Blackburn Deposition – Ron Martinez deposed	SCFA	9 hrs.		
NP	9/2/03 Formula Training with Doug Smith and Jeanne Leland 2.0 claimed	SCFA	2 hrs.		
X	9/3/03 Meet with Bill (Tsui) to discuss part-time seniority	SCFA	½ hr.		
X	9/3/03 Meet with Deb Sutphen to discuss Heather McColgan	SCFA	1 hr.		
NP	9/3/03 Meet with Doug (Smith), John Bukey, Jeanne (Leland) regarding prep for negotiations	FUSE	3 hrs.		
X	9/8/03 Meet with Morgan Lynn, Deb Sutphen and Winsome Jackson regarding Heather McColgan	SCFA	1 hr.		
X	9/15/03 Blackburn Mediation	SCFA	6 hrs.		
X	9/10/03 Meet with David Poirier regarding IIT reorg.	FUSE	1 hr.		
NP	9/10/03 Meet with Doug (Smith), John Bukey and Jeanne (Leland) regarding prep for negotiations	FUSE	½ hr.		
X	9/10/03 Meet with Wayne Barbee and John (Volek) regarding part-time coaching issues	SCFA	1 hr.		
X	9/12/03 Meet with attorneys Alesa Schachter and George Holt and Morgan Lynn, Tina Ludutsky-Taylor, Neal Allbee regarding Heather McColgan	SCFA	3 hrs.		
AG	9/16/03 Meet with Alex Wong regarding grievance	SCFA	½ hr.		
NP	9/16/03 Meet with Mandy (Davies), Morgan Lynn and Doug (Smith) regarding IIT consultant	FUSE	1 ½ hrs.		
AG	9/17/03 Meet with John (Volek) to discuss James Maxey problem	SCFA	1 ½ hrs.		

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: *Ron Martinez* Date: 10/8/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2003-2004

Ron Martinez Associate Vice President, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
NP 9/17/03	Meet with Doug Smith, John Bukey, Jeanne Leland regarding negotiation prep	FUSE	1/2 hr.		
NP 9/24/03	Meet with Diane McKnight & Anthony Gill regarding job duties	FUSE	1 hr.		
X 9/24/03	Meet with Morgan Lynn to discuss Allbee/McColgan issue	SCFA	1 hr		
NP 9/25/03	Meet with Doug Smith, John Bukey, Jeanne Leland regarding negotiation prep	SCFA	3 hrs.		
X 9/26/03	Meet with Doug Smith & Sandra Scott regarding Mary Wollesen	MGMT.	1 hr		
X 9/26/03	Meet with Neal Allbee, Tina Ludutsky-Taylor and Morgan Lynn regarding the Allbee/McColgan issue	SCFA	2 hrs		
NP 9/29/03	Meet with Shari Newman and Bernard Acuna on FUSE problems	FUSE	1 hr.		
NP 9/29/03	Meet with Vance Jacobson and Kevin Ramirez regarding IIT reorg and IIT consultants	FUSE	2 hrs.		
NP 9/29/03	Meet with IIT staff to discuss change in supervisor	FUSE	1 hr.		
AG 9/29/03	Meet with John Volek & Rich Alman regarding James Maxey	SCFA	1 hr.		

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: *Ron Martinez* Date: 10/8/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_





## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2003-2004

Ron Martinez Associate Vice President, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

NP  
 ↓  
 X  
 AG  
 NP  
 NP  
 X  
 NP  
 ↓  
 X  
 NP

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
9/30/03	Met with Sandra Scott & Mary Wollesen regarding SBDC job duties	Mgmt.	1 hr.		
9/30/03	Met with Morgan Lynn & Tina Ludutsky-Taylor regarding Public Safety	SCFA/Mgmt.	1 hr.		
10/1/03	Met with Kevin Ramirez, Morgan Lynn, Doug Smith regarding IIT staff	FUSE	1 hr.		
10/1/03	Met with Jackie Sklarew, Alex Wong, Jack O'Donnell and Dolly Green regarding Automotive Dept. personnel issues	SCFA	<del>1 1/2 hrs.</del>		
10/1/03	Met with John Volek regarding James Maxey grievance	SCFA	1 1/2 hrs.		
10/2/03	Attended Eval Training with attorneys Alesa Schachter and George Holt	SCFA	2 hrs.		
10/3/03	Attended Eval Training with attorneys Alesa Schachter and George Holt	SCFA	2 hrs.		
10/4/03	Met with Sylvia Hernandez regarding IIT reorg and her job duties	FUSE	<del>1/2 hr.</del>		
10/9/03	Attended Eval Training with attorneys Alesa Schachter and George Holt	SCFA	2 hrs.		
10/9/03	Met with Neal Albee and Morgan Lynn regarding Public Safety reorganization	FUSE/Mgmt.	1 hr.		
10/10/03	Met with Doug Smith and Don Cosper regarding SCFA contract <i>claimed</i>	SCFA	2 hrs.		
10/13/03	Met with Katie Juras and Lawrence Lee regarding Katie's job duties	FUSE	<del>1 hr.</del>		
10/13/03	Met with Jan Radford-Harris and Chris Sadlowski regarding Public Safety reorganization	FUSE	1 hr.		

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature: *Ron Martinez* Date: 12/8/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2003-2004

Ron Martinez Associate Vice President, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
10/20/03	Met with Stephanie <u>Guevara</u> , Jeanne <u>Leland</u> , Winsome Jackson, Deb Sutphen, Judy <u>McClymonds</u> regarding faculty evaluation tools	SCFA	1 hr.		
10/22/03	Met with Doug <u>Smith</u> & Jeanne <u>Leland</u> regarding SCFA negotiations <u>OK</u> <u>claimed</u>	SCFA	½ hr.		
10/22/03	Met with Winsome Jackson, Luis Sanchez, Doug <u>Smith</u> regarding SCFA negotiation issues	SCFA	½ hr.		
10/28/03	Met with Marilyn Johnson (Health Center) regarding salary concerns	SCFA	½ hr.		
10/28/03	Met with Henry Eimsted regarding IIT reorganization <u>claimed</u>	FUSE	½ hr.		
11/3/03	Met with Doug <u>Smith</u> , Mandy <u>Davies</u> , Vicki <u>Reader</u> , Jeanne <u>Leland</u> , Ray <u>Cunningham</u> , Lonnie <u>Schwend</u> regarding classified contract	FUSE	1 hr.		
11/5/03	Met with Jackie <u>Sklarew</u> , Dolly <u>Green</u> regarding Alex Wong	SCFA	1 hr.		
11/6/03	Met with Dolly Green regarding transportation /Roseville shuttle	FUSE	<del>1 hr.</del>		
11/18/03	Met with Doug Smith, Vicki Reader, Robert Wickstrom regarding mandated costs	FUSE	<del>1 hr.</del>		
11/21/03	Met with Doug Smith, Ray Cunningham regarding transportation/Roseville shuttle	FUSE	<del>1 hr.</del>		
11/21/03	Met with Michelle DeVol, Sue Drennon & Lawrence Lee regarding Lynn Roath's job duties	FUSE	<del>1 hr.</del>		
11/25/03	Met with Mandy <u>Davies</u> and Henry Eimsted regarding IIT hiring issues	FUSE	1 hr.		
11/25/03	Called George Holt regarding Maxey Grievance	SCFA	1 hr.		

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AG

X

MRP-X

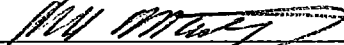
X

X

NP

AG

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature:  Date: 12/08/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

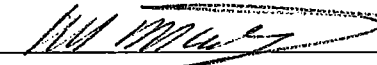
District: Sierra College Fiscal Year: 2003-2004

Ron Martinez Associate Vice President, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
AG 10/25/03	Met with Richard Alman regarding James Maxey grievance	SCFA	1 hr.		
AI 12/1/03	Met with Vicki (Reader) regarding classified salaries	FUSE	1/2 hr.		
AG 12/2/03	Met with Rich Alman, James Maxey, John (Volek) regarding Maxey grievance	SCFA	2 hrs.		
AI 12/10/03	Met with Shana Saichek, Jeanne (Leland), Deb Sutphen regarding Post-94 benefits	SCFA/FUSE	2 hrs.		

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee signature:  Date: 12/08/03

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2004

Ron Martinez Associate Vice President, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

NP  
NP  
AG  
NP  
↓  
AI  
AG  
NP  
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Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
1/28/04	Meet with John Bukey, Jeanne Leland and Doug Smith for pre-meeting before FUSE	FUSE	½ hr.		
1/29/04	Meet with John Bukey, Jeanne Leland and Doug Smith for pre-meeting before SCFA	SCFA	½ hr.		
1/29/04	Meet with James Maxey, Richard Alman, Winsome Jackson RE: grievance	SCFA	1 hr.		
2/2/04	Meet with Mandy Davies RE: Career ladders	FUSE	1 hr.		
2/4/04	Meet with Jeanne Leland and Doug Smith	FUSE	1 hr.		
2/4/04	Meet with John Bukey, Jeanne Leland and Doug Smith for pre-meeting before FUSE	FUSE	½ hr.		
2/5/04	Meet with John Bukey, Jeanne Leland and Doug Smith for pre-meeting before SCFA	SCFA	½ hr.		
2/9/04	Phone meeting with Connie Sturm	SCFA	½ hr.		
2/9/04	Meet with Scott Berry and John Souza	FUSE	½ hr.		
2/11/04	Meet with John Bukey, Jeanne Leland and Doug Smith for pre-meeting before FUSE	FUSE	½ hr.		
2/12/04	Meet with John Bukey, Jeanne Leland and Doug Smith for pre-meeting before SCFA	SCFA	½ hr.		
2/17/04	Meet with John Volek and Jeanne Leland RE: job descriptions	SCFA	½ hr.		
2/10/04	Medical Benefit Options meeting	JLMC	1 hr.		
2/23/04	Meet with James Maxey, Kevin Ramirez, Winsome Jackson, Richard Alman RE: grievance	SCFA	1 hr.		
2/25/04	Meet with John Bukey, Jeanne Leland and Doug Smith for pre-meeting before FUSE	FUSE	½ hr.		
2/26/04	Meet with John Bukey, Jeanne Leland and Doug Smith for pre-meeting before SCFA	SCFA	½ hr.		
2/27/04	Work with Jeanne Leland and Stephanie Guevara on management evaluation tool	MGMT.	1 hr.		

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Employee signature: *Ron Martinez* Date: 8/16/04

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_  
PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2004

Ron Martinez Associate Vice President, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon/11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
3/1/04	Meet with Sean Booth and Carol Cox RE: Dept. Chair concerns	SCFA	1 hr.		
3/3/04	Meet with Ray <u>Cunningham</u> , Amanda Langley, Jesus Blanco, Jeff Lloyd, Bernard Acuna RE: Standby Protocols	FUSE	1 hr.		
3/3/04	Meet with John Bukey, Jeanne <u>Leland</u> and Doug <u>Smith</u> for pre-meeting before FUSE	FUSE	½ hr.		
3/4/04	Meet with John Bukey, Jeanne <u>Leland</u> and Doug <u>Smith</u> for pre-meeting before SCFA	SCFA	½ hr.		
3/8/04	Meet with Bernard Acuna and Joan Basque	FUSE	1 hr.		
3/8/04	Meet with Stephanie <u>Guevara</u> , Jeanne <u>Leland</u> , Dave Kenyon RE: Mgmt. Evals	MGMT.	1 hr.		
X 3/10/04	Meet with Dennis Lee, Doug Smith, Joyce Lopes, Lawrence Lee	JLMC	<del>1 ½ hrs.</del>		schedule 3 already taken
3/10/04	Meet with John Bukey, Jeanne <u>Leland</u> and Doug <u>Smith</u> for pre-meeting before FUSE	FUSE	½ hr.		
3/11/04	Meet with John Bukey, Jeanne <u>Leland</u> and Doug <u>Smith</u> for pre-meeting before SCFA	SCFA	½ hr.		
3/12/04	Work on Salary Schedule	SCFA	4 hrs.		
X 3/15/04	JLMC & Post 94 Meeting	JLMC	<del>2 hrs.</del>		(10) (10) already taken (Kenschedz)
X 3/15/04	Management Eval meeting with Kevin, Stephanie, and Dave Kenyon	MGMT.			
3/16/04	Meet with Vance Jacobson and Doug <u>Smith</u> RE: classified job descriptions	FUSE	1 hr.		
3/17/04	Meet with Henry Eimstad and Jeanne <u>Leland</u> RE: IIT reorg	FUSE	1 hr.		
AG 3/17/04	Meet with John <u>Volek</u> RE: James Maxey grievance	SCFA	1 hr.		
NP 3/17/04	Meet with Sharf Newman, John Bukey and Jeanne <u>Leland</u>	FUSE	1 hr.		

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Employee signature: *Ron Martinez* Date: 5/16/04

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

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COPYRIGHT 1998 SixTen and Associates

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2004

Ron Martinez Associate Vice President, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
3/18/04	Meet with Jeanne <u>Leland</u> , Doug <u>Smith</u> and John Bukey for pre-meeting before SCFA	SCFA	½ hr.		
3/22/04	Meet with Mandy <u>Davies</u> and Shari Newman RE: Financial Aid positions	FUSE	1 hr.		
3/24/04	Meet with Jeanne <u>Leland</u> , Doug <u>Smith</u> and John Bukey for pre-meeting before FUSE	FUSE	½ hr.		
3/29/04	Meet with Ray <u>Cunningham</u> , Tom Booth and Bernard Acuna RE: Work hours	FUSE	1 hr.		
3/29/04	Meet with Stephanie <u>Guevara</u> , Dave Kenyon and Judy <u>McClymonds</u> RE: Management Evals	MGMT.	1 ½ hrs.		
3/30/04	Meet with Carolyn Angleton RE: Disability Leave	SCFA	1 hr.		
4/12/04	Meet with Sheila Boa and Jerry Twomey and Kevin Ramirez RE: Salary Survey	MGMT.	1 hr.		
4/12/04	Meet with Manual Mendoza, Steve Clarkson RE: Work related issues	FUSE	1 hr.		
4/15/04	Meet with Jeanne <u>Leland</u> , Doug <u>Smith</u> and John Bukey for pre-meeting before SCFA	SCFA	½ hr.		
4/19/04	Meet with Mandy <u>Davies</u> , Carla Epting-Davis, and Shari Newman RE: Dee McKenzie & Cathy Barber	FUSE	1 hr.		
4/19/04	Meet with IIT personnel RE: IIT Reorg	FUSE	1 ½ hrs.		
4/19/04	Meet with Shari Newman and Steve Clarkson	FUSE	1 hr.		
4/19/04	Meet with Shari Newman, Carolyn Warner, Geri Snell and Jennifer Dupuis RE: negotiations	FUSE	½ hr.		
4/20/04	Meet with Virginia Willis RE: retirement	FUSE	½ hr.		
4/21/04	Meet with Henry Eimstad and Mandy <u>Davies</u> RE: IIT reorg	FUSE	1 hr.		
4/22/04	Meet with Jeanne <u>Leland</u> , Doug <u>Smith</u> and John Bukey for pre-meeting before SCFA	SCFA	½ hr.		
4/23/04	Meet with George Holt RE: James Maxey	SCFA	1 ½ hrs.	claimed on legal	
4/27/04	Meet with Mandy <u>Davies</u> , Henry Eimstad and Jeanne <u>Leland</u> RE: IIT reorg	FUSE	1 hr.		
4/29/04	Meet with Jeanne <u>Leland</u> , Doug <u>Smith</u> and John Bukey for pre-meeting before SCFA	SCFA	½ hr.		
4/30/04	Meet with Morgan <u>Lynn</u> and Jackie <u>Sklarew</u> RE: EP&S reorg	SCFA/FUSE	2 hrs.		

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Employee signature: Ron Martinez Date: 8/16/04

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

## Individual Activities Time Log for Mandated Costs of 961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2004

Ron Martinez Associate Vice President, Human Resources  
Employee Name Exact Position Title

Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
NP 5/5/04	Meet with Shari Newman	FUSE	1 hr.		
5/6/04	Meet with Jeanne Leland, Doug Smith and John Bukey for pre-meeting before SCFA	SCFA	½ hr.		
X 5/10/04	Meet with Joyce Lopes and Sandra Scott RE: Alex Yarmolyuk overpayment	FUSE	1 hr.		
NP 5/12/04	Meet with Jeanne Leland, Doug Smith and John Bukey for pre-meeting before FUSE	FUSE	½ hr.		
5/13/04	Meet with Jeanne Leland, Doug Smith and John Bukey for pre-meeting before SCFA	SCFA	½ hr.		
5/17/04	Meet with Dolly Green and Mandy Davies	FUSE	1 hr.		
5/17/04	Meet with Ray Cunningham, John Volek, Steve Clarkson and Shari Newman	FUSE	1 hr.		
X 5/20/04	Conference call to George Holt with Bill Tsuji RE: Scott Suneson	SCFA	½ hr.		
NP 5/20/04	Meet with Jeanne Leland, Doug Smith and John Bukey for pre-meeting before SCFA	SCFA	½ hr.		
5/21/04	Meet with Jeanne Leland RE: Conversion	FUSE	½ hr.		
UH 5/25/04	PERB Hearing James Maxey	SCFA	3 hrs.		
NP 5/26/04	Meet with Jeanne Leland, Doug Smith and John Bukey for pre-meeting before FUSE	FUSE	½ hr.		
X 5/27/04	Meet with Bill Tsuji, Dolly Green, Luis Sanchez and Scott Suneson	SCFA	½ hr.		
NP 5/27/04	Meet with Jeanne Leland, Doug Smith and John Bukey for pre-meeting before SCFA	SCFA	½ hr.		

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Employee signature: *Ron Martinez* Date: 5/16/04

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: Sierra College Fiscal Year: 2004

Ron Martinez Associate Vice President, Human Resources  
Employee Name Exact Position Title

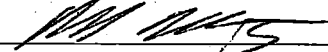
Human Resources, Rocklin (916) 781-0520 12 mon./11 mon./10mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
6/16/04	Meet with Jeanne Leland, Doug Smith and John Bukey for pre-meeting before FUSE	FUSE	½ hr.		
6/17/04	Conference call with Doug Smith to John Bukey	FUSE	1 hr.		
6/17/04	Meet with Jeanne Leland, Doug Smith and John Bukey for pre-meeting before SCFA	SCFA	½ hr.		
6/17/04	Meet with Suzanne Davenport RE: job descriptions	FUSE	½ hr.		
6/23/04	Meet with Jeanne Leland, Doug Smith and John Bukey for pre-meeting before FUSE	FUSE	½ hr.		
7/1/04	Meet with Tina Ludutsky-Taylor, Shari Newman and Bernard Acuna RE: Standby Status	FUSE	1 hr.		
7/13/04	Meet with Joyce Lopes RE: medical benefits	JLMC	½ hr.		
7/14/04	Meet with Mary Wollesen	MGMT.	1 hr.		
7/14/04	Meet with Stephanie Guevara and Dave Kenyon RE: Management Evals	MGMT.	1 hr.		
7/15/04	Call George Holt	SCFA/FUSE	½ hr.		
7/15/04	Meet with Sandra Scott, Morgan Lynn and Dolly Green	MGMT.	1 hr.		
7/21/04	Prep for mediation for David Hay	FUSE	1 hr.		
7/22/04	Mediation for David Hay	FUSE	5 hrs.		
7/27/04	Meet with Mandy Davies, Brian Haley, and Michelle DeVol RE: flex credit	SCFA	1 hr.		
7/28/04	Meet with Mandy Davies and Carla Epting Davis RE: classified positions	FUSE	1 hr.		
7/29/04	Meet with Bernard Acuna	FUSE	1 hr.		

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Employee signature:  Date: 8/17/04

If you have any questions, please contact: \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_



Sierra Joint Community College District  
 Collective Bargaining  
 F/Y 2003-2004  
 Schedule 6  
 Summary of Doug Smith's Time

Component 3			
Negotiations			
Date	NP Certificated	NP Classified	NP
7.30.03		2.50	
8.27.03		0.50	
8.28.03	1.00		
9.2.03	1.50		
9.5.03			1.80
9.8.03	1.00		
9.12.03		2.50	
9.15.03	1.30		
9.19.03	7.80		
9.22.03	2.50		
9.25.03	1.00		
9.25.03		1.00	
10.1.03	1.20		
10.2.03	1.00		
10.6.03	1.00		
10.9.03	1.00		
10.10.03	1.50		
10.13.03	1.00		
10.22.03	1.50		
10.24.03		0.50	
10.28.03		0.50	
11.3.03		1.00	
11.5.03		0.50	
11.20.03	1.00		
11.24.03		0.50	
12.3.03		0.50	
12.4.03	1.00		
12.13.03		5.00	
12.15.03		0.50	
12.17.03		0.50	
1.12.04		2.00	
1.14.04		0.50	
1.16.04		0.50	
1.21.04		0.50	
1.28.04		0.50	
1.29.04	1.00		
2.4.04		0.50	
2.5.04	1.00		
2.11.04		0.50	
2.19.04	1.00		
3.4.04	1.00		
3.5.04		0.80	
3.10.04			2.00
3.18.04	1.00		
4.29.04	1.00		
5.12.04		0.50	
5.25.04		0.50	
5.26.04		0.50	
6.9.04		0.50	
6.16.04		0.50	
<b>Totals</b>	<b>32.30</b>	<b>24.30</b>	<b>3.80</b>

Key	NP	Negotiation Preparation
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Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: Sierra College Fiscal Year: 2003-2004

Doug Smith Vice President/Assistant Superintendent  
Employee Name Exact Position Title

Finance & Admin., Rocklin (916) 781-0546 12 mon./11 mon./10 mon./hrly  
Dept. & Location Telephone #

Date	Description of Activities	Bargaining Unit	Time	# of Copies	Leave Blank
7-30-03	Meeting with IT & Trade staff to review proposed job descriptions	Classified	2hr/50min	2.5	
8-27-03	Pre-negotiations meeting	Classified	30min	0.5	
8-28-03	Pre-negotiations meeting	Faculty	1 hr	1.0	
9-2-03	Meeting with Deb Sutphen, Winsome Jackson, Ron Martinez to discuss faculty negotiations and salary formula <i>claimed</i>	Faculty	1hr/30min	1.5	
9-5-03	Meeting to discuss Pre-94 retiree fund withdrawals: Jeanne Leland, Vicki Reader, Ron Martinez	Class/Rac	1hr/45min	1.8	
9-8-03	Meeting with Winsome Jackson to discuss faculty salary formula	Faculty	1hr	1.0	
9-12-03	Meeting with Jory Hadsell to discuss classified salary formula	Classified	2hr/30min	2.5	
9-15-03	Meeting with Winsome Jackson and Ron Martinez to discuss faculty salary formula <i>claimed</i>	Faculty	1hr/15min	1.3	
9-19-03	Calculate and format for presentation a faculty salary formula document	Faculty	7hr/45min	7.8	
9-22-03 63	Review formula calculations with union president (Winsome Jackson) and Jeanne Leland	Faculty	2hr/30min	2.5	
9-25-03	Pre-negotiations prep meeting	Faculty	1hr	1.0	
9-25-03	Meeting with Vance Jacobsen, consultant, and Lawrence Lee regarding proposed IIT job descriptions for negotiated conversion project for classified staff	Classified	1hr	1.0	
10-1-03	Meeting with Winsome Jackson to discuss salary formula	Faculty	1hr/10min	1.2	
10-1-2-03	Pre-negotiations prep meeting	Faculty	1hr	1.0	
10-6-03	Meeting with Winsome Jackson to discuss salary formula	Faculty	1 hr	1.0	
10-9-03	Pre-negotiations prep meeting	Faculty	1 hr	1.0	
10-10-03	Meeting to prep for negotiations with Don Cosper and Ron Martinez <i>claimed</i>	Faculty	1hr/30min	1.5	
10-13-03	Meeting to discuss and prepare for faculty negotiations with Don Cosper, Winsome Jackson, Ron Martinez	Faculty	1 hr	1.0	
10-22-03	Meeting to discuss and prepare for faculty negotiations with Winsome Jackson	Faculty	1hr/30min	1.5	
10-24-03	Meeting with Jeanne Leland and Vicki Reader to discuss tracking costs of negotiations	Fac/Class	1 hr		
10-24-03	Pre-negotiations prep meeting	Classified	30min	0.5	

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10-28-03	Pre-negotiations prep meeting	Classified	30min	0.5	
11-3-03	Meeting to discuss classified contract issues with classified staff and supervisor	Classified	1 hr	1.0	
11-5-03	Pre-negotiations prep meeting	Classified	30min	0.5	
11-20-03	Pre-negotiations prep meeting	Faculty	1 hr	1.0	
11-24-03	Pre-negotiations prep meeting	Classified	30min	0.5	
12-3-03	Pre-negotiations prep meeting	Classified	30min	0.5	
12-4-03	Pre-negotiations prep meeting	Faculty	1hr	1.0	
12-13-03	Calculate and prepare salary formula spreadsheet comparing faculty and classified	Classified	5 hrs	5.0	
12-15-03	Pre-negotiations prep meeting	Classified	30min	0.5	
12-17-03	Pre-negotiations prep meeting	Classified	30min	0.5	
1-12-04	Planning meeting for classified negotiations: John Bukey, Jeanne (Leland), Ron (Martinez)	Classified	2hr	2.0	
1-14-04	Pre-negotiations prep meeting	Classified	30min	0.5	
1-16-04	Pre-negotiations prep meeting	Classified	30min	0.5	
1-21-04	Pre-negotiations prep meeting	Classified	30min	0.5	
1-28-04	Pre-negotiations prep meeting	Classified	30min	0.5	
1-29-04	Pre-negotiations prep meeting	Faculty	1hr	1.0	
2-4-04	Pre-negotiations prep meeting	Classified	30min	0.5	
2-5-04	Pre-negotiations prep meeting	Faculty	1 hr	1.0	
2-11-04	Pre-negotiations prep meeting	Classified	30min	0.5	
2-19-04	Pre-negotiations prep meeting	Faculty	1hr	1.0	
3-4-04	Pre-negotiations prep meeting	Faculty	1 hr	1.0	
3-5-04	Meeting to discuss issues of permanent part-time classified employees: Jeanne (Leland) and Joyce Lopes	Classified	45min	0.8	
3-10-04	Pre-negotiations meeting to discuss health and welfare benefits for all units: Dennis Lee (consultant), Lawrence (Lee), Joyce Lopes, Ron (Martinez)	Fac/Class	2hr	2.0	
3-18-04	Pre-negotiations prep meeting	Faculty	1 hr	1.0	
4-29-04	Pre-negotiations prep meeting	Faculty	1hr	1.0	
5-12-04	Pre-negotiations prep meeting	Classified	30min	0.5	
5-25-04	Pre-negotiations prep meeting	Classified	30min	0.5	
5-26-04	Pre-negotiations prep meeting	Classified	30min	0.5	
6-9-04	Pre-negotiations prep meeting	Classified	30min	0.5	
6-16-04	Pre-negotiations prep meeting	Classified	30min	0.5	

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Employee signature:  Date: 8/17/04

If you have any questions, please contact: Millie Roberts at 916-781-0544

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ TO \_\_\_\_\_

**Employee Time Record Sheet for Mandated Cost of  
961/75 Collective Bargaining**

District: Sierra College

Fiscal Year: 2003-04

Employee Name: Phyllis Roberts

Exact Position Title: Executive Secretary

Dept. & Location: Finance & Administration 916-781-0544  
Telephone #

Work year length: 12mo/11mo/10mo/hrly

**Reimbursable Activities:**

- Code 1: Determining Bargaining Units and Exclusive Representation
- Code 2: Election of Unit Representation
- Code 3: Cost of Negotiations
- Code 4: Impasse Proceedings
- Code 5: Contract Administration (except "Grievances")
- Code 6: Unfair Labor Practice Charges

Contract Admin

**NOTE: Only one code entry per line.**

Date	Activity Code (Circle One)	Activity (List Topic)	Barg. Unit	Duration Hrs/min	Sub Req'd?
9/24/03	1 2 <b>(3)</b> 4 5 6	Format + type faculty salary Formuld document	F	5/45min	Y <b>(N)</b>
12/15/03	1 2 <b>(3)</b> 4 5 6	Format + type Fac + Class salary Formuld comparisons	C	6/13min	Y <b>(N)</b>
/ /	1 2 3 4 5 6				Y N
/ /	1 2 3 4 5 6				Y N
/ /	1 2 3 4 5 6				Y N
/ /	1 2 3 4 5 6				Y N
/ /	1 2 3 4 5 6				Y N
/ /	1 2 3 4 5 6				Y N
/ /	1 2 3 4 5 6				Y N
/ /	1 2 3 4 5 6				Y N
/ /	1 2 3 4 5 6				Y N
/ /	1 2 3 4 5 6				Y N
/ /	1 2 3 4 5 6				Y N
/ /	1 2 3 4 5 6				Y N
/ /	1 2 3 4 5 6				Y N
/ /	1 2 3 4 5 6				Y N

5.8  
6.2

**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature: Phyllis E. Roberts

Date: 8-16-04

If you have any questions, please contact \_\_\_\_\_ at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

SCFA/FUSE/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential

(NT)

Date: February 5, 2004  
Time: 2:00-4:00 PM  
Location: Boardroom

2.0

<u>FOR THE DISTRICT</u>	<u>FOR</u>	<u>FOR THE UNION</u>
John Bukey	Richa	Geri Snell
Jeanne Leland	Wayr	Carolyn Warner
Ron Martinez*	Wins	Jennifer Dupuis
Diane McKnight	Luis	
Doug Smith (facilitator)	Deb	
	Jim Weir	

NT  
(both classified  
+certificated  
combined)

\*Chief Negotiator  
Guests: From Los Rios CCD: Jon Sharpe, Vice Chancellor, Finance and Administration and Dennis Smith, President of LRCFT; Don Cosper

• **Check-In:**

Los Rios Formula Presentation

Today's meeting was a joint session with FUSE, SCFA, and District. Our guests from Los Rios, Jon Sharpe and Dennis Smith presented the "The Bucket Concept" (Los Rios CCD Funding Allocation Model). Along with the presentation and responding to questions from the group, Jon and Dennis provided handouts of the PowerPoint presentation, LRCFT Contract language, sample letters used by LRCFT to its membership, and LRCCD 02-03 formula summary for all employee groups.

• **Check-Out:**

The group thanked Jon and Dennis and noted that the existing Sierra College formula had many similarities to the Los Rios model. The group agreed to work together to modify the Sierra College formula. With the joint retreat in March, formula modification will be considered as a possible subject for interest-based training. FUSE is interested in contacting a Los Rios classified representative with which to discuss the formula. The group discussed the sharing the costs for the Los Rios facilitators, an estimated \$350.00. SCFA agreed and FUSE will need to check with their E board.

#

Tri-Party Retreat #4  
Wednesday, June 30, 2004  
Fireside Room  
9:00-5:00 PM

NT

3.0

**Facilitators: Neil and Joanne Bodine with Robin Hargrave**

**FUSE** Bernard Acuna, Jeff Lloyd, Shari Newman, Carolyn Warner, Gerri Snell,  
John Lervold, Sue Keller

**SCFA** Winsome Jackson, Jim Weir, Luis Sanchez, Richard Alman, Wayne  
Barbee (in 1:00), Jim Forkum (in 1:00)

**District:** Ron Martinez, Doug Smith, Diane McKnight, John Bukey, Jeanne  
Leland

**Agenda**

1. Check in, agenda, minutes (revisions requested on 5/28/04), process check
2. Report from closed session (with the Board of Trustees)
3. Discuss criteria further
4. Continue to build formula:
  - straw design
  - refinement
5. Next steps, meeting evaluation

A. Report on Closed Session:

Management team wanted to keep Board abreast of our "formula" activities and asked Neil to facilitate an interest-based process to capture the "interests" of the Board related to compensation. The closed session was conducted on 6/22/04 with Neil doing short interest based overview. Management team did overview of what we are doing. The balance of the time was spent on capture of the Board's interests. Although similar to ours, they also focused on infrastructure and student success. They were supportive of a "living wage" concept, but within the framework of student success as the primary focus. They were concerned about the community and reasons why the bond measure failed as well as fiscal integrity and solvency. One trustee was absent. Arrangements are in the works to schedule a time for Neil to meet with him so they are all on board.

B. Criteria (continued)

1. Fiscal Accountability

- needs to take into account expenses as well as revenue

► This year's big items:

1. deficit
2. staffing
3. debt service

► need to list and give detail and backup data

Name	Job Title	2003-2004 Productive Hourly Rate
Stephanie Guevara		58.13
Joyce Lopes	Director of Finance	35.09
Jackie Sklarew		
Craig Yamamoto		52.91
Allbee, Neal	Assoc. Dean, Public Safety	76.24
Brazil, Donna	NCC Supervisor/Admin Support	46.31
Cunningham, Ray	Assistant Director, Plant Operations	52.64
Davies, Mandy	Dean, Student Services	79.74
Decourten, Frank	Dean, Tahoe/Truckee	75.03
Dollesin, Ninette	Project Manager EP & S	34.68
Epling-Davis, Carla	Director	72.29
Haley, Brian	Dean, Learning Resource Center	72.57
Jackson, Darlene	Assoc Dean, Child Development Ctr	67.95
Kalina, Michelle		70.85
Kleinbach, Mary	Executive Secretary EP&S	46.44
Lee, Lawrence	Asst VP, IT	61.28
Leland, Jean	Personnel Assistant	47.92
Ludulsky-Taylor, Tina	Exec Dean, WNCC	80.39
Lynn, Morgan	VP, EP & S	87.79
Mackey, Jennifer	Assistant Prog Mgr, Community Ed	36.98
Martinez, Ron	Director, Human Resources	82.38
McClymonds, Judy	Admin Assistant	44.40
McKnight, Diane	Assoc Dean, Liberal Arts	67.55
Nunnally, Delecia	Associate Dean, Student Services	68.71
Reader, Vicki	Business Services Supervisor	52.16
Roberts, Millie	Executive Secretary	49.54
Schneider, Greg	Purchasing Supervisor	39.21
Schwenk, Lonnie	Chief of Police Services	46.95
Scott, Sandra	Director, Economic Development	76.96
Smith, Doug	VP Finance Admin	91.88
Snyder, Scott	Tech Support Services Manager	57.58
Thiers, Laurie	Project Manager EP&S	43.56
Tsuji, Bill	Dean, Liberal Arts	86.95
Volek, John	Dean, PE Athletics	75.94
Walters-Dunlap, Karen	Dean, Science and Math	73.88
White, Margaret	Assoc Director Nursing	70.35
Wickstrom, Robert	Director, Business Services	88.79
Wilson, Woodrow	Director, Planning and Research	48.11
Wollesen, Mary	Program Manager of SBDC	61.50

Forkum, Jim .20

Powers, Jan .80

Yorde, Phil .80

no PHRs - too late  
to request per Diane

**Sierra Joint Community College District  
Collective Bargaining  
by Name**

White, Margeret - Associate Director, Nursing Salaried Employee	\$75.87
--	---------

<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	12.00	\$910.44	\$0.00	\$0.00 Contract Administration	Contract Administration Com
	Time spent in Dean's Council committee meetings.				
	<u>12.00</u>	<u>\$910.44</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Wickstrom, Robert - Director, Business Services Salaried Employee	\$88.79
--	---------

<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
7/16/02	1.00	\$88.79	\$0.00	\$0.00 Contract Administration	Contract Interpretation
	Time spent in contract interpretations				
10/23/02	1.40	\$124.31	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff				
10/23/02	1.40	\$124.31	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff				
11/4/02	1.00	\$88.79	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff				
1/1/03	3.80	\$337.40	\$0.00	\$0.00 Contract Administration	Contract Administration Com
	Time spent in Dean's Council committee meetings.				
2/7/03	0.90	\$79.91	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with certificated staff				
3/27/03	0.90	\$79.91	\$0.00	\$0.00 Cost of Negotiations	Negotiations Preparation
	Time spent preparing for negotiations with classified staff				
	<u>10.40</u>	<u>\$923.42</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Wilson, Woodrow - Director Planning & Research Salaried Employee	\$78.11
---	---------

<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	2.10	\$164.03	\$0.00	\$0.00 Contract Administration	Contract Administration Com
	Time spent in Dean's Council committee meetings.				
	<u>2.10</u>	<u>\$164.03</u>	<u>\$0.00</u>	<u>\$0.00</u>	

Wollesen, Mary - Program Manager, SBDC & Ec Dev Salaried Employee	\$59.08
--	---------

<u>Date</u>	<u>Hours</u>	<u>Salary</u>	<u>Materials</u>	<u>Contracted Component</u>	<u>Activity</u>
1/1/03	1.10	\$64.99	\$0.00	\$0.00 Contract Administration	Contract Administration Com
	Time spent in Dean's Council committee meetings.				
	<u>1.10</u>	<u>\$64.99</u>	<u>\$0.00</u>	<u>\$0.00</u>	



Kevin Ramirez = President

**SixTen and Associates**  
**MANDATE REIMBURSEMENT SERVICES**

**PRODUCTIVE HOURLY RATE UPDATE**

Note: Please provide the rates for the FY: 03-04 the missing rates for FY: 02-03.

**COMMUNITY COLLEGE DISTRICT** Sierra Joint Community College District

Name	Title	Fiscal Years:	
		02-03	03-04
	AVERAGE ADMINISTRATIVE ASSISTANT		
	AVERAGE ADMINISTRATIVE SECRETARY		
	AVERAGE ASSOCIATE DEAN	\$ 73.81	
	AVERAGE DEAN	\$ 78.11	
	AVERAGE EXECUTIVE SECRETARY		
	AVERAGE FACULTY		
	AVERAGE PRESIDENT		
	AVERAGE VICE PRESIDENT		
ALLBEE, NEAL	ASSOC. DEAN, PUBLIC SAFETY	\$ 79.47	
BASQUE, JOAN	ADMINISTRATIVE ASSISTANT	\$ 38.76	
BATES, MARTY	SR COMPUTER OPERATOR	\$ 49.65	
BERMAN, NANCY	DEAN OF BUSINESS HIGH TECH.	\$ -	
BIRDSONG, CYNIDIE	PAYROLL TECHNICIAN	\$ 25.07	
BRAZIL, DONNA	NCC SUPERVISOR/ADMIN SUPPORT	\$ 46.36	

**Six Ten and Associates**

**MANDATE REIMBURSEMENT SERVICES**

Name	Title	02-03	03-04
BRIDGES, KAREN	ADMINISTRATIVE SECRETARY	\$ 27.32	
CLARKSON, STEPHEN	CLASS/GROUNDS MAINTENANCE. II	\$ 35.29	
CONWAY, MARY	DEAN OF PHYSICAL EDUCATION	\$ 78.73	
CORBETT, DIANE	CLASS/ADMINISTRATIVE ASSISTANT I	\$ 47.49	
<del>COSPER, DONALD</del>	<del>FACULTY</del>	\$ 169.17	
CULLEY, CHRISTINA	ADMIN ASSISTANT	\$ 42.71	
CUNNINGHAM, RAY	ASSISTANT DIRECTOR OF PLANT OPERATIONS	\$ 53.59	
DAVENPORT, SUZANNE	PROFESSOR/LRC COORDIATOR	\$ 103.65	
DAVIES, MANDY	DEAN, STUDENT SERVICES	\$ 86.02	
DECOURTEN, FRANK	DEAN, TAHOE/TRUCKEE	\$ 80.95	
DOLLESIN, NINETTE	PROJECT MANAGER EP&S	\$ 51.15	
DRENNON, SUE	PERSONNEL ASSISTANT	\$ 54.04	
DUPIUS, JENNIFER	PAYROLL TECHNICIAN	\$ 29.22	
ECHAVARRIA, RUTH	ADMINISTRATIVE ASSISTANT	\$ 37.26	
EPTING-DAVIS, CARLA	DIRECTOR	\$ 73.23	
FISHER, SUE	EXECUTIVE SECRETARY/BOARD RECORDER	\$ 43.10	
<del>GIESZELMANN, ED</del>	<del>FACULTY</del>	\$ 134.55	
GIFFORD, NORMAN	ADMINISTRATIVE SERVICE TECH.	\$ 44.85	
GOFF, ARLENE	FACILITIES PLANNING	\$ 43.52	

**Six Ten and Associates**

**MANDATE REIMBURSEMENT SERVICES**

Name	Title	02-03	03-04
GREEN, DOLLY	MGR OF DIVERSITY PROGRAMS	\$ 51.66	58.13
GUEVARA, STEPHANIE <sup>took last year</sup>	PROFESSOR, BUSINESS ? <sup>Dean, Business Tech</sup>	\$ 45.32	
HALEY, BRIAN	DEAN, LEARNING RESOURCE CTR	\$ 78.11	
HALLAM, JENE	SECRETARY	\$ 41.67	
HAMBLEN, JOHN	RESIDENCE LIFE SUPERVISOR	\$ 33.05	
HELWICK, SUE	MANAGER COMPUTER/NETWORK OPERATIONS	\$ 72.97	
HUTCHING, SHARON	ADMINISTRATIVE SECRETARY	\$ 45.01	
JACKSON, DARLENE	ASSOCIATE DEAN, CHILD DEVELOPMENT CENTER	\$ 70.67	
JAMISON, DIANNE	ADMINISTRATIVE TECH III/SBDC ECONOMICS DEVELOPMENT	\$ 38.02	
JUNG, STEPHEN	DEAN OF BUSINESS HIGH TECH.	\$ 80.95	
KALINA, MICHELLE <sup>took last year</sup>	PROFESSOR-RESEARCH <sup>Assoc Dean Science + MATH</sup>	\$ 42.76	
KELLEY, CRAIG	RESEARCH ANALYST	\$ 37.76	
KLEINBACH, MARY	EXECUTIVE SECRETARY - EP&S	\$ 47.42	
LEE, KELLY	PAYROLL TECHNICIAN	\$ 25.07	
LEE, LAWRENCE	ASST. VP. IT	\$ 86.02	
LELAND, JEAN <sup>took last yr</sup>	PERSONNEL ASSISTANT	\$ 42.75	
LINDE, KAREN	ATHLETIC DIRECTOR	\$ 69.91	
LUDUTSKY-TAYLOR, TINA	EXEC. DEAN-WNCC	\$ 88.90	
LYNN, MORGAN	VP, EP & S	\$ 93.05	

X

**Six Ten and Associates**

**MANDATE REIMBURSEMENT SERVICES**

Name	Title	02-03	03-04
MACKAY, JENNIFER	ASSISTANT PROG MGR-COMMUNITY ED	\$ 33.99	
MALFA, DIANNE	ADMIN ASSISTANT-CHILD DEVELOPMENT CTRS	\$ 38.87	
MARTINDALE, SHIRLEY	ADMIN. SECRETARY III	\$ 41.67	
MARTINEZ, RON	DIRECTOR, HUMAN RESOURCES	\$ 94.39	
MCCLYMONDS, JUDY	ADMIN. ASST.	\$ 39.69	
MCDERMID, PATT	FACULTY FACILITATOR	\$ 159.22	
McKINNEY, DIANE	ADMIN SECRETARY	\$ 38.26	
McKNIGHT, DIANE	ASSOC. DEAN LIBERAL ARTS	\$ 73.81	
MCLAUGHLIN, CAROLYN	ACCOUNTING TECHNICIAN	\$ 31.95	
McVAY, SUSAN (WILLIAMS)	EXECUTIVE ASSISTANT OF PUBLICATION	\$ 68.11	
MICHAELS, SUE	SUPERVISOR-MARKETING/PUBLIC RELATIONS	\$ 49.96	
MODDER, GAIL	PROJECT MANAGER CUSTOMER SERVICES	\$ 43.99	
<del>NAVADEREEN, SOUNDERA</del>	<del>PT-INSTRUCTOR</del>	\$ 51.18	
<del>NEWMAN, SHARL(JONES)</del>	<del>CLASS/COMMUNICATIONS. SERVICE TECH.</del>	\$ 45.45	
NUNNALLY, DELECIA	ASSOCIATE DEAN, STUDENT SERVICES	\$ 63.60	
PAULSON, JAN	MANAGER SYSTEMS/PROGRAMS	\$ 64.05	
POLAND, BECKY	ADMIN ASSISTANT-STUDENT SERVICES	\$ 32.28	
POWERS, JAN	COMMUNITY ED PROGRAM MANAGER	\$ 57.82	
<del>RAMIREZ, KEVIN</del>	<del>PRESIDENT</del>	\$ 122.13	

669

X

UTION

**MANDATE REIMBURSEMENT SERVICES**

Name	Title	02-03	03-04
READER, VICKI	BUSINESS SERVICES SUPERVISOR	\$ 68.11	
REHWALD, WENDE	COLLEGE HEALTH NURSE PRACTITIONER	\$ 127.49	
REID, CORAL	ADMINISTRATIVE SERVICES TECH II	\$ 36.75	
ROATH, LYNN	ENVIRONMENT HEALTH & SAFETY SPECIALIST	\$ 49.25	
ROBERTS, MILLIE	EXECUTIVE SECRETARY	\$ 50.40	
SANCHEZ, LUIS	FACULTY	\$ 129.27	
SCHAEFFER, MARCELLE	PROGRAM MANAGER	\$ 49.19	
SCHNEIDER, GREG	PURCHASING SUPERVISOR	\$ 39.12	
SCHWENK, LONNIE	CHIEF OF POLICE SERVICES	\$ 48.85	
SCOTT, SANDRA	DIRECTOR OF ECONOMIC DEVELOPMENT	\$ 74.75	
SESSIONS, PAM	ADMIN. SERVICE TECH III	\$ 41.77	
SHIELDS, TRACY	ADMIN SVCS TECH III-RECORDS/EVALUATIONS	\$ 39.69	
SILER, TINA	HR DEVELOPMENT ASSISTANT	\$ 36.11	
SMALLEY, CRAIG	DATA ADMIN/DIST SYST SEC MGR	\$ 64.93	
SMITH, DOUG	VP FINANCE ADMIN.	\$ 85.93	
SNYDER, SCOTT	TECH SUPPORT SERVICES MANAGER	\$ 53.66	
SUMNER, JOANN	ASSOC DEAN CURRIC.	\$ 86.31	
THIERS, LAURIE	PROJECT MANAGER EP&S	\$ 41.71	
TSUJI, BILL	DEAN, LIBERAL ARTS	\$ 86.65	

**Sierra Ten and Associates**

**MANDATE REIMBURSEMENT SERVICES**

Name	Title	02-03	03-04
VELAZQUEZ, NILO	BOOKSTORE MANAGER	\$ 65.10	
VERMILLION, RHONDA	PAYROLL TECHNICIAN	\$ 29.07	
VOLEK, JOHN	DEAN-P.E. ATHLETICS	\$ 74.75	
WALTERS-DUNLAP, KAREN	DEAN, SCIENCE AND MATH	\$ 78.11	
WHARFF, BEVERLY	PERSONNEL TECHNICIAN	\$ 54.89	
WHITE, MARGERET	ASSOC DIRECTOR NURSING	\$ 75.87	
WICKSTROM, ROBERT	DIRECTOR OF BUSINESS SERVICES	\$ 88.79	
WILSON, JAMES	INSTRUCTIONAL. ASST. III	\$ 47.01	
WILSON, WOODROW	DIRECTOR, PLANNING AND RESEARCH	\$ 78.11	
WOLLESEN, MARY	PROGRAM MANGER OF SBDC & ECONOMIC DEVELOPMENT	\$ 59.08	
YORDE, PHIL	TECH SUPPORT SERVICES MANAGER	\$ 52.99	

Name	Job Title	2003-2004 Productive Hourly Rate
Stephanie Guevara	Dean Business/Tech	58.15
Joyce Lopes	Director of Finance	35.09
Jackie Sklarew	ASST DEAN BUSINESS/TECH	71.09
Craig Yamamoto	Financial Services Mgr	52.81

B. Please advise us of the nature of the issues listed below that were found in the legal billings already submitted to us.

Issue	Grievance	Tenure Grievance	Title 5 Discrimination	Arbitration	Other
EPOS Contract					
SIG Contract					
Article 18 Training					

#8  
which legal  
billings +  
then when can  
research nature  
of issues

\* Sign-in sheets for the Collective Bargaining Training Workshop held by the Center for Collaborative Solutions on March 25 and 26, 2004. (A copy of the invoices for this workshop is attached)

\* No Sign-in Sheet

FUSE Bargaining Training Attendees 3/25-26/04  
Shari Newman, Barbara Aune  
Duc Keller, Carolyn Warner  
Geri Small, Jeff Wood

\* INFORMATION FROM FUSE PRESIDENT  
SHARI NEWMAN

Thank you

# SixTen and Associates

## Mandate Reimbursement Services

**KEITH B. PETERSEN, President**  
 5252 Balboa Avenue, Suite 807  
 San Diego, CA 92117

**Telephone: (858) 514-8605**  
**Fax: (858) 514-8645**  
**E-Mail: Kbpsixten@aol.com**

1 Page(s) this memo  
0 Page(s) attachment

### FAX TRANSMITTAL

**DATE:** November 30, 2004

**FAX TO:** Linda Fisher, Accounting Manager  
 Sierra CCD  
 (916) 781-0455

**FROM:** Diane Bramwell

**CC:** Robert Wickstrom

**SUBJECT:** Annual Reimbursement Claim  
 Collective Bargaining  
 FY 03 /04

*e-mailed  
 her 11/30.*

**PLEASE RESPOND BY: December 9, 2004**

In order to process the above referenced claim, please provide the following information:

- 1) The Productive Hourly Rate for the district staff members shown below.

Name	Title	Productive Hourly Rate 2003-2004
Drennon, Sue	Personnel Assistant	<i>56.74</i> 54-04 +5%
Green, Dolly	Manager of Diversity Programs	<i>54.24</i> 51-66 +5%

Thank you.





<b>CLAIM FOR PAYMENT</b> Pursuant to Government Code Section 17561 <b>COLLECTIVE BARGAINING</b>	For State Controller Use only (19) Program Number 00232 (20) Date Filed ___/___/___ (21) LRS Input ___/___/___	Program <b>232</b>
---	---	-----------------------

L A B E L H E R E	(01) Claimant Identification Number: <span style="float: right;">CC31090</span>	Reimbursement Claim Data																			
	(02) Claimant Name: <span style="float: right;">Sierra Joint CCD</span>	(22) CB-1, (03)(1)(e)	77																		
	County of Location: <span style="float: right;">Placer</span>	(23) CB-1, (03)(2)(e)																			
	Street Address: <span style="float: right;">5000 Rocklin Road</span>	(24) CB-1, (03)(3)(e)	67,070																		
	City: <span style="float: right;">Rocklin</span> State: <span style="float: right;">CA</span> Zip Code: <span style="float: right;">95677</span>	(25) CB-1, (03)(4)(e)	1,206																		
	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <th style="width:20%;">Type of Claim</th> <th style="width:20%;">Estimated Claim</th> <th style="width:20%;">Reimbursement Claim</th> <th style="width:40%;"></th> </tr> <tr> <td></td> <td>(03) Estimated <input checked="" type="checkbox"/></td> <td>(09) Reimbursement <input checked="" type="checkbox"/></td> <td>(26) CB-1, (03)(5)(e)</td> </tr> <tr> <td></td> <td>(04) Combined <input type="checkbox"/></td> <td>(10) Combined <input type="checkbox"/></td> <td>(27) CB-1, (03)(6)(e) <span style="float: right;">9,496</span></td> </tr> <tr> <td></td> <td>(05) Amended <input type="checkbox"/></td> <td>(11) Amended <input type="checkbox"/></td> <td>(28) CB-1, (03)(7)(e) <span style="float: right;">27,149</span></td> </tr> <tr> <td></td> <td></td> <td></td> <td>(29) CB-1, (04)(d) <span style="float: right;">72,363</span></td> </tr> </table>	Type of Claim	Estimated Claim	Reimbursement Claim			(03) Estimated <input checked="" type="checkbox"/>	(09) Reimbursement <input checked="" type="checkbox"/>	(26) CB-1, (03)(5)(e)		(04) Combined <input type="checkbox"/>	(10) Combined <input type="checkbox"/>	(27) CB-1, (03)(6)(e) <span style="float: right;">9,496</span>		(05) Amended <input type="checkbox"/>	(11) Amended <input type="checkbox"/>	(28) CB-1, (03)(7)(e) <span style="float: right;">27,149</span>				(29) CB-1, (04)(d) <span style="float: right;">72,363</span>
Type of Claim	Estimated Claim	Reimbursement Claim																			
	(03) Estimated <input checked="" type="checkbox"/>	(09) Reimbursement <input checked="" type="checkbox"/>	(26) CB-1, (03)(5)(e)																		
	(04) Combined <input type="checkbox"/>	(10) Combined <input type="checkbox"/>	(27) CB-1, (03)(6)(e) <span style="float: right;">9,496</span>																		
	(05) Amended <input type="checkbox"/>	(11) Amended <input type="checkbox"/>	(28) CB-1, (03)(7)(e) <span style="float: right;">27,149</span>																		
			(29) CB-1, (04)(d) <span style="float: right;">72,363</span>																		
	Fiscal Year of cost: (06) <span style="float: right;">2005-2006</span>	(12) <span style="float: right;">2004-2005</span>	(30) CB-1, (04)(e) <span style="float: right;">104,997</span>																		
	Total Claimed Amount: (07) <span style="float: right;">\$ 93,000</span>	(13) <span style="float: right;">\$ 84,769</span>	(31) CB-1, (05)(e) <span style="float: right;">7,557</span>																		
	Less: 10% Late Penalty	(14) <span style="float: right;">\$ -</span>	(32) CB-1, (07) <span style="float: right;">78,064</span>																		
	Less: Prior Claim Payment Received	(15) <span style="float: right;">\$ -</span>	(33) CB-1, (11) <span style="float: right;">41</span>																		
	Net Claimed Amount	(16) <span style="float: right;">\$ 84,769</span>	(34) CB-1, (12) <span style="float: right;">6,705</span>																		
	Due from State: (08) <span style="float: right;">\$ 93,000</span>	(17) <span style="float: right;">\$ 84,769</span>	(35) CB-1, (14)																		
	Due to State	(18)	(36) CB-1, (15)																		

**(37) CERTIFICATION OF CLAIM**

In accordance with the provisions of Government Code Section 17561, I certify that I am the officer authorized by the community college district to file mandated cost claims with the State of California for this program, and certify under penalty of perjury that I have not violated any of the provisions of Government Code Sections 1090 to 1098, inclusive.

I further certify that there was no application other than from the claimant, nor any grant or payment received, for reimbursement of costs claimed herein, and such costs are for a new program or increased level of services of an existing program. All offsetting savings and reimbursements set forth in the Parameters and Guidelines are identified, and all costs claimed are supported by source documentation currently maintained by the claimant.

The amounts for this Estimated Claim and/or Reimbursement Claim are hereby claimed from the State for payment of estimated and/or actual costs set forth on the attached statements. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Signature of Authorized Officer (USE BLUE INK)  _____ Joyce Lopes Type or Print Name	Date <span style="font-size: 1.5em;">1/13/2006</span> _____ Director of Finance Title
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(8) Name of Contact Person for Claim: SixTen and Associates

Telephone Number: (858) 514-8605

E-mail Address: kbpsixten@aol.com

**Program  
232**

**MANDATED COSTS  
COLLECTIVE BARGAINING  
CLAIM SUMMARY**

**FORM  
CB-1**

(01) Claimant: S. Joint CCD	(02) Type of Claim Reimbursement <input checked="" type="checkbox"/> Estimated <input type="checkbox"/>	Fiscal Year 2004-2005
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(03) Reimbursable Components	Cost Elements				
	(a) Salaries and Benefits	(b) Materials and Supplies	(c) Travel and Training	(d) Contract Services	(e) Total
1. Determining Bargaining Units and Exclusive Representation	\$ 23.08	\$ -	\$ -	\$ 54.00	\$ 77.08
2. Election of Unit Representation	\$ -	\$ -	\$ -	\$ -	\$ -
3. Cost of Negotiations	\$ 24,868.75	\$ -	\$ -	\$ 42,160.45	\$ 67,029.20
4. Impasse Proceedings	\$ 1,205.51	\$ -	\$ -	\$ -	\$ 1,205.51
5. Collective Bargaining Agreement Disclosure	\$ -	\$ -	\$ -	\$ -	\$ -
6. Contract Administration	\$ 6,229.35	\$ -	\$ -	\$ 3,307.50	\$ 9,536.85
7. Unfair Labor Practice Charges	\$ 307.20	\$ -	\$ -	\$ 26,841.51	\$ 27,148.71
<b>Total Rodda Act Direct Costs</b>	<b>\$ 32,633.89</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 72,363.46</b>	<b>\$ 104,997.35</b>

Winton Act Direct Costs					
(05) Base Year, 1974-75 Direct Costs	\$ 4,453.00	\$ -	\$ 104.00	\$ 3,000.00	\$ 7,557.00
(06) Base Year Direct Costs Adjusted by IPD	[Line (05)(e) x 3.564 for 2004-2005 F.Y.]				\$ 26,933.15
(07) Increased Direct Costs	[Line (04)(e) - line (06)]				\$ 78,064.20

Indirect Costs					
(08) Total Rodda Act Direct Costs less Contracted Services	[Line (04)(e) - line (04)(d)]				\$ 32,633.89
(09) Base Year Costs less Contracted Services adjusted by IPD	[[Line (05)(e) - line (05)(d)] x 3.564]				\$ 16,241.15
(10) Increased Direct Costs less Contract Services	[Line (08) - line (09)]				\$ 16,392.74
(11) Indirect Cost Rate	[Federally approved OMB A-21, FAM-29C, or 7%]				40.90%
(12) Increased Indirect Costs	[Line (10) x line (11)]				\$ 6,704.63
(13) Total Increased Direct and Indirect Costs	[Line (07) + line (12)]				\$ 84,768.83

Cost Reduction					
(14) Less: Offsetting Savings					\$ -
(15) Less: Other Reimbursements					\$ -
(16) Total Claimed Amount:	[Line (13) - (Line (14) + Line (15))]				\$ 84,768.83

Program <b>232</b>	<b>MANDATED COSTS</b> <b>COLLECTIVE BARGAINING</b> <b>COMPONENT/ACTIVITY COST DETAIL</b>	FORM CB-2
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(01) Claimant Sierra Joint CCD	(02) Fiscal Year Costs Were Incurred  <b>2004-2005</b>
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(03) Reimbursable Components: Check only **one** box per form to identify the component being claimed.

<input checked="" type="checkbox"/> Determining Bargaining Units and Exclusive Representation	<input type="checkbox"/> Collective Bargaining Agreement Disclosure
<input type="checkbox"/> Election of Unit Representation	<input type="checkbox"/> Contract Administration
<input type="checkbox"/> Cost of Negotiations	<input type="checkbox"/> Unfair Labor Practice Charges
<input type="checkbox"/> Impasse Proceedings	

(04) Description of Expenses	Object Accounts					
(a) Employee Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel	(g) Contract Services
Developing proposed bargaining unit determination list for PERB hearings Martinez, Ron                      Assoc. VP Human Resources Johnson Schachter Lewis      Attorney	\$76.92 \$135.00	0.3 0.4	\$ 23.08			\$ 54.00

(05) Total	<input checked="" type="checkbox"/>	Subtotal	<input type="checkbox"/>	Page 1 of 1	\$ 23.08	\$ -	\$ -	\$ 54.00
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**MANDATED COSTS**  
**COLLECTIVE BARGAINING**  
**COMPONENT/ACTIVITY COST DETAIL**

Program  
**232**

FORM  
CB-2

(01) Claimant  
Sierra Joint CCD

(02) Fiscal Year Costs Were Incurred  
2004-2005

(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

<input type="checkbox"/> Determining Bargaining Units and Exclusive Representation	<input type="checkbox"/> Collective Bargaining Agreement Disclosure
<input type="checkbox"/> Election of Unit Representation	<input type="checkbox"/> Contract Administration
<input checked="" type="checkbox"/> Cost of Negotiations	<input type="checkbox"/> Unfair Labor Practice Charges
<input type="checkbox"/> Impasse Proceedings	

(04) Description of Expenses				Object Accounts			
(a) Employee Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel	(g) Contract Services	
<b>At-Table Negotiations: Certificated</b>							
Leland, Jean	Employee Relations Analyst	\$46.78	10.1	\$ 472.48			
Martinez, Ron	Assoc. VP Human Resources	\$76.92	13.1	\$ 1,007.65			
Smith, Doug	VP Finance admin.	\$83.81	10.1	\$ 846.48			
McKnight, Diane	Associate Dean	\$67.31	10.6	\$ 713.49			
Lopes, Joyce	Director of Finance	\$69.12	11.0	\$ 760.32			
<b>At-Table Negotiations: Classified</b>							
Leland, Jean	Employee Relations Analyst	\$46.78	78.5	\$ 3,672.23			
Martinez, Ron	Assoc. VP Human Resources	\$76.92	78.5	\$ 6,036.22			
Smith, Doug	VP Finance admin.	\$83.81	48.7	\$ 4,081.55			
McKnight, Diane	Associate Dean	\$67.31	16.0	\$ 1,076.96			
Davies, Mandy	Assoc. VP Dean Student Svcs.	\$76.92	3.0	\$ 230.76			
Haley, Brian	Dean, LR Center	\$72.11	4.0	\$ 288.44			
Scott, Sandra	Dir. Of Econ. Develop.	\$72.11	4.0	\$ 288.44			
<b>Negotiation Subjects Committee</b>							
Leland, Jean	Employee Relations Analyst	\$46.78	8.8	\$ 411.66			
Martinez, Ron	Assoc. VP Human Resources	\$76.92	10.8	\$ 830.74			
Smith, Doug	VP Finance admin.	\$83.81	3.3	\$ 276.57			
Drennon, Sue	Benefits coordinator	\$40.11	4.3	\$ 172.47			
Green, Dolly	Manager Diversity	\$60.95	2.0	\$ 121.90			
Lawrence, Lee	Dir. Risk, Feasability and Loss Control	\$74.79	6.3	\$ 471.18			
McKnight, Diane	Associate Dean	\$67.31	1.8	\$ 121.16			
White, Margaret	Assoc. Dir. Nursing	\$67.31	3.3	\$ 222.12			
Lopes, Joyce	Director of Finance	\$69.12	9.3	\$ 642.82			
<b>Preparing for negotiations</b>							
School Services	Consulting Services	\$1.00	11,200.0			\$ 11,200.00	
Leland, Jean	Employee Relations Analyst	\$46.78	2.0	\$ 93.56			
Martinez, Ron	Assoc. VP Human Resources	\$76.92	13.1	\$ 1,007.65			
Smith, Doug	VP Finance admin.	\$83.81	1.0	\$ 83.81			
Green, Dolly	Manager Diversity	\$60.95	2.0	\$ 121.90			
McKnight, Diane	Associate Dean	\$67.31	1.0	\$ 67.31			
Davies, Mandy	Assoc. VP Dean Student Svcs.	\$76.92	4.8	\$ 369.22			
Guevara, Stephanie	Associate Dean	\$72.11	0.5	\$ 36.06			
Haley, Brian	Dean, LR Center	\$72.11	1.0	\$ 72.11			
Lopes, Joyce	Director of Finance	\$69.12	0.5	\$ 34.56			
Morgan, Lynn	Vice President, EP&S	\$83.81	2.0	\$ 167.62			
Johnson Schachter Lewis	Attorney	\$135.00	7.0			\$ 945.00	
John L. Bukey	Attorney	\$135.00	2.5			\$ 337.50	
Epling-Davis, Carla	Assoc. Dean Student Services	\$67.31	1.0	\$ 67.31			
<b>*At-table* negotiations with employee representatives</b>							

(05) Total  Subtotal  Page 1 of 2 \$ 24,868.75 \$ - \$ - \$ 12,482.50

Program <b>232</b>	<b>MANDATED COSTS</b> <b>COLLECTIVE BARGAINING</b> <b>COMPONENT/ACTIVITY COST DETAIL</b>					<b>FORM</b> <b>CB-2</b>
(01) Claimant Sierra Joint CCD			(02) Fiscal Year Costs Were Incurred 2004-2005			
(03) Reimbursable Components: Check only one box per form to identify the component being claimed.						
<input type="checkbox"/> Determining Bargaining Units and Exclusive Representation		<input type="checkbox"/> Collective Bargaining Agreement Disclosure				
<input type="checkbox"/> Election of Unit Representation		<input type="checkbox"/> Contract Administration				
<input checked="" type="checkbox"/> Cost of Negotiations		<input type="checkbox"/> Unfair Labor Practice Charges				
<input type="checkbox"/> Impasse Proceedings						
(04) Description of Expenses				Object Accounts		
(a)	(b)	(c)	(d)	(e)	(f)	(g)
Employee Names, Job Classifications, Functions Performed and Description of Expenses	Hourly Rate or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Travel	Contract Services
John L. Bukey Attorney John Bukey Attorney	\$135.00 \$1.00	212.5 990.5				\$ 28,687.50 \$ 990.45
(05) Total <input checked="" type="checkbox"/> Subtotal <input type="checkbox"/>			Page 2 of 2 \$ 24,868.75	\$ -	\$ -	\$ 42,160.45

**MANDATED COSTS**  
**COLLECTIVE BARGAINING**  
**COMPONENT/ACTIVITY COST DETAIL**

Program  
**232**

**FORM  
 CB-2**

(01) Claimant  
 Sierra Joint CCD

(02) Fiscal Year Costs Were Incurred  
 2004-2005

(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

<input type="checkbox"/> Determining Bargaining Units and Exclusive Representation	<input type="checkbox"/> Collective Bargaining Agreement Disclosure
<input type="checkbox"/> Election of Unit Representation	<input type="checkbox"/> Contract Administration
<input type="checkbox"/> Cost of Negotiations	<input type="checkbox"/> Unfair Labor Practice Charges
<input checked="" type="checkbox"/> Impasse Proceedings	

(04) Description of Expenses

(a) Employee Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel	(g) Contract Services
Preparing for mediation and/or factfinding proceedings Martinez, Ron                      Assoc. VP Human Resources	\$76.92	1.0	\$ 76.92			
Attending mediation sessions and fact finding sessions Martinez, Ron                      Assoc. VP Human Resources	\$76.92	5.0	\$ 384.60			
Preparing for fact finding Dollesin, Ninette                      R&R analyst	\$45.09	14.0	\$ 631.26			
Thiers, Laurie                      R&R analyst	\$45.09	2.5	\$ 112.73			

(05) Total  Subtotal  Page 1 of 1 \$ 1,205.51 \$ - \$ - \$ -

Revised 09/03

**MANDATED COSTS**  
**COLLECTIVE BARGAINING**  
**COMPONENT/ACTIVITY COST DETAIL**

Program  
**232**

FORM  
CB-2

(01) Claimant: Sierra Joint CCD  
 (02) Fiscal Year Costs Were Incurred: 2004-2005

(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

<input type="checkbox"/> Determining Bargaining Units and Exclusive Representation	<input type="checkbox"/> Collective Bargaining Agreement Disclosure
<input type="checkbox"/> Election of Unit Representation	<input checked="" type="checkbox"/> Contract Administration
<input type="checkbox"/> Cost of Negotiations	<input type="checkbox"/> Unfair Labor Practice Charges
<input type="checkbox"/> Impasse Proceedings	

(04) Description of Expenses

(a) Employee Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	Object Accounts			
			(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel	(g) Contract Services
CCD Tenure disputes Johnson Schachter Lewis Attorney	\$135.00	0.2				\$ 27.00
Contract Administration Green, Dolly Manager Diversity	\$60.95	1.0	\$ 60.95			
Contract administration committees						
Dollesin, Ninette R&R analyst	\$45.09	1.0	\$ 45.09			
Thiers, Laurie R&R analyst	\$45.09	1.0	\$ 45.09			
Leland, Jean Employee Relations Analyst	\$46.78	0.3	\$ 14.03			
Martinez, Ron Assoc. VP Human Resources	\$76.92	5.9	\$ 453.83			
McKnight, Diane Associate Dean	\$67.31	5.7	\$ 383.67			
White, Margaret Assoc. Dir. Nursing	\$67.31	4.4	\$ 296.16			
Alibee, Neal Associate Dean Public Safety	\$72.11	4.8	\$ 346.13			
Bridges, Karen Administrative Secretary	\$29.08	0.3	\$ 8.72			
Davies, Mandy Assoc. VP Dean Student Svcs.	\$76.92	2.5	\$ 192.30			
DeCourten, Frank Dean	\$72.11	6.0	\$ 432.66			
Guevara, Stephanie Associate Dean	\$72.11	5.2	\$ 374.97			
Haley, Brian Dean, LR Center	\$72.11	5.5	\$ 396.61			
Jackson, Darlene Assoc. Dean, CDC	\$67.31	4.1	\$ 275.97			
Kalina, Michelle Professor Research Coord	\$89.37	1.3	\$ 90.18			
Kleinbach, Mary Exec. Sec. EP&S	\$40.11	5.9	\$ 236.65			
Lopes, Joyce Director of Finance	\$89.12	0.4	\$ 27.65			
Morgan, Lynn Vice President, EP&S	\$83.81	3.4	\$ 284.95			
Nunnally, Delecla Associate Dean	\$67.31	4.7	\$ 316.36			
Scott, Sandra Dir. Of Econ. Develop.	\$72.11	2.9	\$ 209.12			
Ludutsky-Taylor, Tina Provost NCC	\$81.73	1.3	\$ 106.25			
Tsuji, Bill Dean, Liberal Arts	\$72.11	6.0	\$ 432.66			
Volek, John Dean, PE-Athletics	\$72.11	6.0	\$ 432.66			
Epting-Davis, Caria Assoc. Dean Student Services	\$67.31	0.8	\$ 53.85			
Contract Interpretation						
Martinez, Ron Assoc. VP Human Resources	\$76.92	4.9	\$ 376.91			
Green, Dolly Manager Diversity	\$60.95	1.0	\$ 60.95			
Guevara, Stephanie Associate Dean	\$72.11	1.9	\$ 137.01			
Morgan, Lynn Vice President, EP&S	\$83.81	1.0	\$ 83.81			
Johnson Schachter Lewis Attorney	\$135.00	24.3				\$ 3,280.50
Wollesen, Mary Prog. Mgr of SBDC	\$54.16	1.0	\$ 54.16			

(05) Total  Subtotal  Page 1 of 1 \$ 6,229.35 \$ - \$ - \$ 3,307.50



**MANDATED COSTS**  
**COLLECTIVE BARGAINING**  
**COMPONENT/ACTIVITY COST DETAIL**

Program  
**232**

FORM  
CB-2

(01) Claimant  
Sierra Joint CCD

(02) Fiscal Year Costs Were Incurred  
2004-2005

(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

<input type="checkbox"/> Determining Bargaining Units and Exclusive Representation.	<input type="checkbox"/> Collective Bargaining Agreement Disclosure
<input type="checkbox"/> Election of Unit Representation	<input type="checkbox"/> Contract Administration
<input type="checkbox"/> Cost of Negotiations	<input checked="" type="checkbox"/> Unfair Labor Practice Charges
<input type="checkbox"/> Impasse Proceedings	

(04) Description of Expenses Object Accounts

(a) Employee Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel	(g) Contract Services
<b>Preparing for PERB actions</b>						
Martinez, Ron                      Assoc. VP Human Resources	\$76.92	2.0	\$ 153.84			
Volek, John                          Dean, PE-Athletics	\$72.11	1.2	\$ 86.53			
Johnson Schachter Lewis      Attorney	\$135.00	143.4				\$ 19,359.00
Johnson Schachter and Lewi    Attorney	\$75.00	12.3				\$ 922.50
JohnsonSchachterLewis        Attorney	\$1.00	1,108.2				\$ 1,108.20
<b>PERB administrative hearings</b>						
Martinez, Ron                      Assoc. VP Human Resources	\$76.92	0.4	\$ 30.77			
Volek, John                          Dean, PE-Athletics	\$72.11	0.5	\$ 36.06			
Johnson Schachter Lewis      Attorney	\$135.00	40.3				\$ 5,440.50
JohnsonSchachterLewis        Attorney	\$1.00	11.3				\$ 11.31

(05) Total  Subtotal  Page 1 of 1      \$ 307.20      \$ -      \$ -      \$ 26,841.51

a Joint CCD  
 96175 C. ACTIVE BARGAINING  
 2004-2005  
 Sort by Name

Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
Schedule 5	4.80	Alibee, Neal	Associate Dean Public Safety	\$72.11	\$346.13	Contract administration committees	Contract Administration
Schedule 5	4.80	Alibee, Neal Total			\$346.13		
Schedule 5	0.30	Bridges, Karen	Administrative Secretary	\$29.08	\$8.72	Contract administration committees	Contract Administration
Schedule 5	0.30	Bridges, Karen Total			\$8.72		
7/27/2004	1.00	Davies, Mandy	Assoc. VP Dean Student Svcs.	\$76.92	\$76.92	Preparing for negotiations	Cost of Negotiations
7/28/2004	1.00	Davies, Mandy	Assoc. VP Dean Student Svcs.	\$76.92	\$76.92	Preparing for negotiations	Cost of Negotiations
8/5/2004	2.00	Davies, Mandy	Assoc. VP Dean Student Svcs.	\$76.92	\$153.84	Preparing for negotiations	Cost of Negotiations
4/13/2005	0.50	Davies, Mandy	Assoc. VP Dean Student Svcs.	\$76.92	\$38.46	Preparing for negotiations	Cost of Negotiations
Johnson 2	0.30	Davies, Mandy	Assoc. VP Dean Student Svcs.	\$76.92	\$23.08	Preparing for negotiations	Cost of Negotiations
Schedule 5	2.50	Davies, Mandy	Assoc. VP Dean Student Svcs.	\$76.92	\$192.30	Contract administration committees	Contract Administration
Schedule 6	3.00	Davies, Mandy	Assoc. VP Dean Student Svcs.	\$76.92	\$230.76	At-Table Negotiations: Classified	Cost of Negotiations
Schedule 5	10.30	Davies, Mandy Total			\$792.28		
Schedule 5	6.00	DeCourten, Frank	Dean	\$72.11	\$432.66	Contract administration committees	Contract Administration
Schedule 5	6.00	DeCourten, Frank Total			\$432.66		
Schedule 1	14.00	Dollesin, Ninette	R&R analyst	\$45.09	\$631.26	Preparing for fact finding	Impasse Proceedings
Schedule 5	1.00	Dollesin, Ninette	R&R analyst	\$45.09	\$45.09	Contract administration committees	Contract Administration
Schedule 3	15.00	Dollesin, Ninette Total			\$676.35		
Schedule 3	4.30	Drennon, Sue	Benefits coordinator	\$40.11	\$172.47	Negotiation Subjects Committee	Cost of Negotiations
Schedule 3	4.30	Drennon, Sue Total			\$172.47		
7/28/2004	1.00	Epting-Davis, Carla	Assoc. Dean Student Services	\$67.31	\$67.31	Preparing for negotiations	Cost of Negotiations
Schedule 5	0.80	Epting-Davis, Carla	Assoc. Dean Student Services	\$67.31	\$53.85	Contract administration committees	Contract Administration
Schedule 5	1.80	Epting-Davis, Carla Total			\$121.16		
7/15/2004	1.00	Green, Dolly	Manager Diversity	\$60.95	\$60.95	Contract Interpretation	Contract Administration
8/5/2004	2.00	Green, Dolly	Manager Diversity	\$60.95	\$121.90	Preparing for negotiations	Cost of Negotiations
Johnson 2	1.00	Green, Dolly	Manager Diversity	\$60.95	\$60.95	Contract Administration	Contract Administration
Schedule 3	2.00	Green, Dolly	Manager Diversity	\$60.95	\$121.90	Negotiation Subjects Committee	Cost of Negotiations
Schedule 3	6.00	Green, Dolly Total			\$365.70		
7/14/2004	1.00	Guevara, Stephanie	Associate Dean	\$72.11	\$72.11	Contract Interpretation	Contract Administration
Johnson 2	0.50	Guevara, Stephanie	Associate Dean	\$72.11	\$36.06	Preparing for negotiations	Cost of Negotiations
Johnson 2	0.90	Guevara, Stephanie	Associate Dean	\$72.11	\$64.90	Contract Interpretation	Contract Administration
Schedule 5	5.20	Guevara, Stephanie	Associate Dean	\$72.11	\$374.97	Contract administration committees	Contract Administration
Schedule 5	7.60	Guevara, Stephanie Total			\$548.04		
7/27/2004	1.00	Haley, Brian	Dean, LR Center	\$72.11	\$72.11	Preparing for negotiations	Cost of Negotiations
Schedule 5	5.50	Haley, Brian	Dean, LR Center	\$72.11	\$396.61	Contract administration committees	Contract Administration
Schedule 6	4.00	Haley, Brian	Dean, LR Center	\$72.11	\$288.44	At-Table Negotiations: Classified	Cost of Negotiations
Schedule 5	10.50	Haley, Brian Total			\$757.16		
Schedule 5	4.10	Jackson, Darlene	Assoc. Dean, CDC	\$67.31	\$275.97	Contract administration committees	Contract Administration

Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
	4.10	Jackson, Darlene Total			\$275.97		
Bukey 1	990.45	John Bukey	Attorney	\$1.00	\$990.45	"At-table" negotiations with employee representatives	Cost of Negotiations
	990.45	John Bukey Total			\$990.45		
Bukey 1	2.50	John L. Bukey	Attorney	\$135.00	\$337.50	Preparing for negotiations	Cost of Negotiations
Bukey 1	212.50	John L. Bukey	Attorney	\$135.00	\$28,687.50	"At-table" negotiations with employee representatives	Cost of Negotiations
	215.00	John L. Bukey Total			\$29,025.00		
Johnson 1	12.30	Johnson Schachter and Lewis	Attorney	\$75.00	\$922.50	Preparing for PERB actions	Unfair Labor Practice
	12.30	Johnson Schachter and Lewis Total			\$922.50		
Johnson 1	0.40	Johnson Schachter Lewis	Attorney	\$135.00	\$54.00	Developing proposed bargaining unit determination list f	Determining Bargaining Unit
Johnson 1	7.00	Johnson Schachter Lewis	Attorney	\$135.00	\$945.00	Preparing for negotiations	Cost of Negotiations
Johnson 1	24.30	Johnson Schachter Lewis	Attorney	\$135.00	\$3,280.50	Contract Interpretation	Contract Administration
Johnson 1	0.20	Johnson Schachter Lewis	Attorney	\$135.00	\$27.00	CCD Tenure disputes	Contract Administration
Johnson 1	143.40	Johnson Schachter Lewis	Attorney	\$135.00	\$19,359.00	Preparing for PERB actions	Unfair Labor Practice Chrg
Johnson 1	40.30	Johnson Schachter Lewis	Attorney	\$135.00	\$5,440.50	PERB administrative hearings	Unfair Labor Practice Chrg
	215.60	Johnson Schachter Lewis Total			\$29,106.00		
Johnson 1	1108.20	JohnsonSchachterLewis	Attorney	\$1.00	\$1,108.20	Preparing for PERB actions	Unfair Labor Practice Chrg
Johnson 1	11.31	JohnsonSchachterLewis	Attorney	\$1.00	\$11.31	PERB administrative hearings	Unfair Labor Practice Chrg
	1119.51	JohnsonSchachterLewis Total			\$1,119.51		
Schedule 5	1.30	Kalina, Michelle	Professor Research Coord	\$69.37	\$90.18	Contract administration committees	Contract Administration
	1.30	Kalina, Michelle Total			\$90.18		
Schedule 5	5.90	Kleinbach, Mary	Exec. Sec. EP&S	\$40.11	\$236.65	Contract administration committees	Contract Administration
	5.90	Kleinbach, Mary Total			\$236.65		
Schedule 3	6.30	Lawrence, Lee	Dir. Risk, Feasibility and Loss Control	\$74.79	\$471.18	Negotiation Subjects Committee	Cost of Negotiations
	6.30	Lawrence, Lee Total			\$471.18		
8/5/2004	1.00	Leland, Jean	Employee Relations Analyst	\$46.78	\$46.78	Preparing for negotiations	Cost of Negotiations
9/16/2004	1.00	Leland, Jean	Employee Relations Analyst	\$46.78	\$46.78	Preparing for negotiations	Cost of Negotiations
Schedule 2	55.50	Leland, Jean	Employee Relations Analyst	\$46.78	\$2,596.29	At-Table Negotiations: Classified	Cost of Negotiations
Schedule 3	8.80	Leland, Jean	Employee Relations Analyst	\$46.78	\$411.66	Negotiation Subjects Committee	Cost of Negotiations
Schedule 4	10.10	Leland, Jean	Employee Relations Analyst	\$46.78	\$472.48	At-Table Negotiations: Certificated	Cost of Negotiations
Schedule 5	0.30	Leland, Jean	Employee Relations Analyst	\$46.78	\$14.03	Contract administration committees	Contract Administration
Schedule 6	23.00	Leland, Jean	Employee Relations Analyst	\$46.78	\$1,075.94	At-Table Negotiations: Classified	Cost of Negotiations
	99.70	Leland, Jean Total			\$4,663.96		
7/13/2004	0.50	Lopes, Joyce	Director of Finance	\$69.12	\$34.56	Preparing for negotiations	Cost of Negotiations
Schedule 3	9.30	Lopes, Joyce	Director of Finance	\$69.12	\$642.82	Negotiation Subjects Committee	Cost of Negotiations
Schedule 5	0.40	Lopes, Joyce	Director of Finance	\$69.12	\$27.65	Contract administration committees	Contract Administration
Schedule 6	11.00	Lopes, Joyce	Director of Finance	\$69.12	\$760.32	At-Table Negotiations: Certificated	Cost of Negotiations
	21.20	Lopes, Joyce Total			\$1,465.35		

Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
Schedule 5	1.30	Ludutsky-Taylor, Tina	Provost NCC	\$81.73	\$106.25	Contract administration committees	Contract Administration
	1.30	Ludutsky-Taylor, Tina Total			\$106.25		
7/1/2004	1.00	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$76.92	Preparing for negotiations	Cost of Negotiations
7/13/2004	0.50	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$38.46	Preparing for negotiations	Cost of Negotiations
7/14/2004	1.00	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$76.92	Contract Interpretation	Contract Administration
7/14/2004	1.00	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$76.92	Contract Interpretation	Contract Administration
7/15/2004	0.50	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$38.46	Preparing for negotiations	Cost of Negotiations
7/15/2004	1.00	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$76.92	Contract Interpretation	Contract Administration
7/21/2004	1.00	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$76.92	Preparing for mediation and/or factfinding proceedings	Impasse Proceedings
7/22/2004	5.00	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$384.60	Attending mediation sessions and fact finding sessions	Impasse Proceedings
7/27/2004	1.00	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$76.92	Preparing for negotiations	Cost of Negotiations
7/28/2004	1.00	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$76.92	Preparing for negotiations	Cost of Negotiations
7/29/2004	1.00	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$76.92	Preparing for negotiations	Cost of Negotiations
8/3/2004	1.00	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$76.92	Preparing for negotiations	Cost of Negotiations
8/5/2004	1.00	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$76.92	Preparing for negotiations	Cost of Negotiations
8/5/2004	2.00	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$153.84	Preparing for negotiations	Cost of Negotiations
8/10/2004	0.50	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$38.46	Preparing for negotiations	Cost of Negotiations
8/12/2004	1.00	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$76.92	Contract Interpretation	Contract Administration
8/12/2004	0.50	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$38.46	Preparing for negotiations	Cost of Negotiations
9/16/2004	1.00	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$76.92	Preparing for negotiations	Cost of Negotiations
11/17/2004	2.00	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$153.84	Preparing for negotiations	Cost of Negotiations
Johnson 2	0.90	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$69.23	Contract Interpretation	Contract Administration
Johnson 2	0.40	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$30.77	PERB administrative hearings	Unfair Labor Practice Charge
Johnson 2	2.00	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$153.84	Preparing for PERB actions	Unfair Labor Practice Charge
Johnson 2	0.30	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$23.08	Developing proposed bargaining unit determination list	Determining Bargaining Unit
Johnson 2	0.10	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$7.69	Preparing for negotiations	Cost of Negotiations
Schedule 2	58.50	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$4,499.82	At-Table Negotiations: Classified	Cost of Negotiations
Schedule 3	10.80	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$830.74	Negotiation Subjects Committee	Cost of Negotiations
Schedule 4	13.10	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$1,007.65	At-Table Negotiations: Certificated	Cost of Negotiations
Schedule 5	5.90	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$453.83	Contract administration committees	Contract Administration
Schedule 6	20.00	Martinez, Ron	Assoc. VP Human Resources	\$76.92	\$1,538.40	At-Table Negotiations: Classified	Cost of Negotiations
	135.00	Martinez, Ron Total			\$10,384.21		
9/16/2004	1.00	McKnight, Diane	Associate Dean	\$67.31	\$67.31	Preparing for negotiations	Cost of Negotiations
Schedule 3	1.80	McKnight, Diane	Associate Dean	\$67.31	\$121.16	Negotiation Subjects Committee	Cost of Negotiations
Schedule 4	10.60	McKnight, Diane	Associate Dean	\$67.31	\$713.49	At-Table Negotiations: Certificated	Cost of Negotiations
Schedule 5	5.70	McKnight, Diane	Associate Dean	\$67.31	\$383.67	Contract administration committees	Contract Administration
Schedule 6	16.00	McKnight, Diane	Associate Dean	\$67.31	\$1,076.96	At-Table Negotiations: Classified	Cost of Negotiations

Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
	35.10	McKnight, Diane Total			\$2,362.59		
7/15/2004	1.00	Morgan, Lynn	Vice President, EP&S	\$83.81	\$83.81	Contract Interpretation	Contract Administration
11/17/2004	2.00	Morgan, Lynn	Vice President, EP&S	\$83.81	\$167.62	Preparing for negotiations	Cost of Negotiations
Schedule 5	3.40	Morgan, Lynn	Vice President, EP&S	\$83.81	\$284.95	Contract administration committees	Contract Administration
Schedule 5	6.40	Morgan, Lynn Total			\$536.38		
Schedule 5	4.70	Nunnally, Delecia	Associate Dean	\$67.31	\$316.36	Contract administration committees	Contract Administration
Schools 1	4.70	Nunnally, Delecia Total			\$316.36		
Schools 1	11200.00	School Services	Consulting Services	\$1.00	\$11,200.00	Preparing for negotiations	Cost of Negotiations
Schools 1	11200.00	School Services Total			\$11,200.00		
Schedule 5	2.90	Scott, Sandra	Dir. Of Econ. Develop.	\$72.11	\$209.12	Contract administration committees	Contract Administration
Schedule 6	4.00	Scott, Sandra	Dir. Of Econ. Develop.	\$72.11	\$288.44	At-Table Negotiations: Classified	Cost of Negotiations
9/16/2004	6.90	Scott, Sandra Total			\$497.56		
Schedule 2	1.00	Smith, Doug	VP Finance admin.	\$83.81	\$83.81	Preparing for negotiations	Cost of Negotiations
Schedule 3	39.70	Smith, Doug	VP Finance admin.	\$83.81	\$3,327.26	At-Table Negotiations: Classified	Cost of Negotiations
Schedule 4	3.30	Smith, Doug	VP Finance admin.	\$83.81	\$276.57	Negotiation Subjects Committee	Cost of Negotiations
Schedule 5	10.10	Smith, Doug	VP Finance admin.	\$83.81	\$846.48	At-Table Negotiations: Certificated	Cost of Negotiations
Schedule 6	9.00	Smith, Doug	VP Finance admin.	\$83.81	\$754.29	At-Table Negotiations: Classified	Cost of Negotiations
Schedule 1	63.10	Smith, Doug Total			\$5,288.41		
Schedule 1	2.50	Thiers, Laurie	R&R analyst	\$45.09	\$112.73	Preparing for fact finding	Impasse Proceedings
Schedule 5	1.00	Thiers, Laurie	R&R analyst	\$45.09	\$45.09	Contract administration committees	Contract Administration
Schedule 5	3.50	Thiers, Laurie Total			\$157.82		
Schedule 5	6.00	Tsuji, Bill	Dean, Liberal Arts	\$72.11	\$432.66	Contract administration committees	Contract Administration
Johnson 2	6.00	Tsuji, Bill Total			\$432.66		
Johnson 2	0.50	Volek, John	Dean, PE-Athletics	\$72.11	\$36.06	PERB administrative hearings	Unfair Labor Practice
Schedule 5	1.20	Volek, John	Dean, PE-Athletics	\$72.11	\$86.53	Preparing for PERB actions	Unfair Labor Practice Charge
Schedule 3	6.00	Volek, John	Dean, PE-Athletics	\$72.11	\$432.66	Contract administration committees	Contract Administration
Schedule 3	7.70	Volek, John Total			\$555.25		
Schedule 3	3.30	White, Margaret	Assoc. Dir. Nursing	\$67.31	\$222.12	Negotiation Subjects Committee	Cost of Negotiations
Schedule 5	4.40	White, Margaret	Assoc. Dir. Nursing	\$67.31	\$296.16	Contract administration committees	Contract Administration
7/14/2004	7.70	White, Margaret Total			\$518.28		
7/14/2004	1.00	Wollesen, Mary	Prog. Mgr of SBDC	\$54.16	\$54.16	Contract Interpretation	Contract Administration
7/14/2004	1.00	Wollesen, Mary Total			\$54.16		
	14236.36	Grand Total			\$104,997.35		

Sierra CCD  
Collective Bargaining  
FY 2004/05  
Summary of Reimbursable Legal Services  
John L. Bukey  
Schedule - Bukey 1

Billing Date	Service Date	Employee Contact	Employee Time	Component 1		
				Negotiations		
				NP	NT	NT Costs
8/31/2004	8/10				10.00	
	8/25				5.25	
11/1/2004	11/3				4.75	
	11/4				5.00	
	11/10				5.00	
	11/11				5.50	
	11/17				5.00	
	11/18				3.00	
	12/8				5.00	
	12/9				6.00	
	12/15				5.50	
	12/16				5.50	
1/1/2005	1/26				5.00	\$468.00
	1/27			2.50		
2/1/2005	2/2				5.00	
	2/3				5.00	
	2/9				5.00	
	2/16				5.00	
	2/17				5.00	
	2/24				5.00	
3/1/2005	3/3				5.00	
	3/8				4.75	
	3/9				5.00	
	3/10				5.25	
	3/17				5.00	
4/1/2005	4/12				9.75	
	4/13				4.00	
	4/19				3.50	
	4/20				3.00	
	4/21				5.00	
	4/28				4.50	
5/1/2005	5/4				4.25	
	5/5				5.00	
	5/11				5.00	
	5/12				4.50	
	5/18				3.75	
	5/19				3.00	
	5/25				3.75	
	5/26				4.50	
	5/27				3.50	\$522.45
6/1/2005	6/2				4.50	
	6/15				4.50	
	6/16				5.50	
	6/30				5.50	
<b>Total Attorney Hours:</b>				<b>2.50</b>	<b>212.50</b>	<b>\$990.45</b>
<b>Total Staff Hours</b>			<b>0.00</b>			

**KEY**

NP	Negotiations Prep.
NT	Negotiations

# ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
08/10/04	Tripartite Bargaining, Necessary Travel	10.00
08/25/04	FUSE Negotiations, Necessary Travel	5.25
<b>TOTAL COLLECTIVE BARGAINING</b>		15.25

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL EXPENSES</b>		NONE

**JOHN L. BUKEY**  
Attorney at Law  
1526 Eighth Avenue  
Sacramento, California 95818-4102  
(916) 443-4778

## STATEMENT

Doug Smith  
Vice President, Finance & Administration  
Sierra Joint Community College District  
5000 Rocklin Road  
Rocklin, California 95677-3397

Dear Mr. Smith:

A summary of the hours for the period January 1, 2005, through January 31, 2005, is attached.

If there are any questions concerning the amount of the billing or the service provided, I urge you to call me. I appreciate your business and welcome your comments.

<b>TOTAL HOURS FOR YEAR</b>	<b>280.00</b>
<b>Balance Brought Forward</b>	<b>145.00</b>
<b>Hours Utilized During Statement Period (See Itemized Statement)</b>	<b>7.50</b>
<b>BALANCE HOURS REMAINING</b>	<b>137.50</b>

**EXPENSES (See Itemized Statement)**

**\$468.00**

**TOTAL DUE**

**\$468.00**

P.O. 050078

*John L. Bukey*  
OK to pay

John L. Bukey  
Attorney at Law



# ITEMIZATION

AL:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	AMOUNT
11/03/04	FUSE Negotiations; Necessary Travel	4.75
11/04/04	SCFA Negotiations; Tri-Partite Negotiations; Necessary Travel	5.00
11/10/04	FUSE Negotiations; Necessary Travel	5.00
11/11/04	SCFA Negotiations; JLMC Negotiations; Necessary Travel	5.50
11/17/04	FUSE Negotiations; Necessary Travel	5.00
11/18/04	Tri-Partite Negotiations; Necessary Travel	3.00
12/08/04	FUSE Negotiations; Necessary Travel	5.00
12/09/04	Tri-Partite Negotiations; Necessary Travel	6.00
12/15/04	FUSE Negotiations; Necessary Travel	5.50
12/16/04	Tri-Partite Negotiations; Necessary Travel	5.50
<b>TOTAL COLLECTIVE BARGAINING</b>		50.25

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL EXPENSES</b>		NONE

# ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	AMOUNT
02/02/05	FUSE Negotiations; Necessary Travel	5.00
02/03/05	Tripartite Negotiations; Necessary Travel	5.00
02/09/05	FUSE Negotiations; Necessary Travel	5.00
02/16/05	FUSE Negotiations; Necessary Travel	5.00
02/17/05	Tripartite Negotiations; Necessary Travel	5.00
02/24/05	SCFA Negotiations; Necessary Travel	5.00
<b>TOTAL COLLECTIVE BARGAINING</b>		30.00

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL EXPENSES</b>		NONE

# ITEMIZATION

## GENERAL:

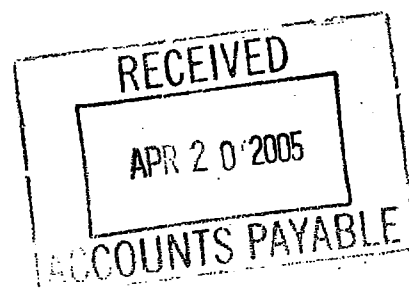
DATE	DESCRIPTION	TIME
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
03/03/05	SCFA Negotiations; Necessary Travel	5.00
03/08/05	Board Closed Session Re Negotiations; Necessary Travel	4.75
03/09/05	FUSE Negotiations; Necessary Travel	5.00
03/10/05	Tripartite Negotiations; Necessary Travel	5.25
03/17/05	SCFA Negotiations; Necessary Travel	5.00
<b>TOTAL COLLECTIVE BARGAINING</b>		25.00

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL EXPENSES</b>		NONE



# ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		0.00

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
04/12/05	Attendance at Board Meeting and Board Closed Session; Necessary Travel	9.75
04/13/05	FUSE Negotiations; Necessary Travel	4.00
04/19/05	Formula Subcommittee; Necessary Travel	3.50
04/20/05	Work on Formula with D. Smith and J. Lopes	3.00
04/21/05	Tripartite Negotiations; Necessary Travel	5.00
04/28/05	Tripartite Negotiations; Necessary Travel	4.50
<b>TOTAL COLLECTIVE BARGAINING</b>		29.75

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL EXPENSES</b>		NONE

RECEIVED  
 MAY 13 2005  
 ACCOUNTS PAYABLE

## ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		NONE

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	AMOUNT
05/04/05	FUSE Negotiations; Necessary Travel	(4.25)
05/05/05	Tripartite Negotiations; Necessary Travel	(5.00)
05/11/05	FUSE Negotiations; Necessary Travel	(5.00)
05/12/05	Tripartite Negotiations; Necessary Travel	(4.50)
05/18/05	FUSE Negotiations; Necessary Travel	(3.75)
05/19/05	Tripartite Negotiations; Necessary Travel	(3.00)
05/25/05	FUSE Negotiations; Necessary Travel	(3.75)
05/26/05	Tripartite Negotiations; Necessary Travel	(4.50)
05/27/05	Joint Labor Meeting; Necessary Travel	(3.50)
<b>TOTAL COLLECTIVE BARGAINING</b>		37.25

RECEIVED

JUN 16 2005

## EXPENSES:

DATE	DESCRIPTION	AMOUNT PAYABLE
02/02/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
02/03/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
02/09/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
02/17/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
02/24/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
03/08/05	Travel — 140 Miles @ \$0.405/Mile	\$56.70
03/09/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
03/10/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
03/17/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
04/12/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
04/13/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
04/19/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
04/20/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25

04/21/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
04/28/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
05/04/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
05/05/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
05/11/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
05/12/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
05/18/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
05/19/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
05/25/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
05/26/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
05/27/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
<b>TOTAL EXPENSES</b>		<b>\$522.45</b>

RECEIVED  
JUN 16 2005  
ACCOUNTS PAYABLE

## ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		NONE

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
06/02/05	Tripartite Negotiations; Necessary Travel	4.50
06/15/05	FUSE Negotiations; Necessary Travel	4.50
06/16/05	Tripartite Negotiations; Necessary Travel	5.50
06/30/05	Tripartite Negotiations; Necessary Travel ( <i>Est.</i> )	5.50
<b>TOTAL COLLECTIVE BARGAINING</b>		20.00

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL EXPENSES</b>		NONE









Billing Date	Service Date	Employee Contact	Employee Time	Component 1	Component 3	Component 6	Component 7							
				Bargaining Units BU	Negotiations NP	Contract Administration AI AGT	UP \$75p/h	UP Costs	UH Costs	UH				
5/27/2005	4/6							0.10						
	4/6							0.10						
	4/6							0.10						
	4/8							0.10						
	4/20												0.10	
	4/20												0.10	
	4/20												0.10	
	4/20												0.10	
	4/20												0.10	
	4/20	Ron Martinez	0.20										0.20	
	4/20												0.20	
	4/21												0.10	
	4/21												0.10	
	4/21												0.10	
	4/21												0.80	
	4/21												0.10	
	4/21												0.10	
	4/21	Ron Martinez	0.20										0.20	
	4/21												2.50	
	4/22												4.40	
	4/25						3.20							
	4/25						0.10							
6/22/2005	5/10												0.10	
	5/10												4.60	
	5/12												0.10	
	5/12												0.10	
	5/12												0.30	
	5/25												0.10	
7/28/2005	6/10							0.10					\$11.31	
	6/10							0.10						
				Total Attorney Hours:	8.10									
				Total Staff Hours	0.40	7.00	24.30	143.40	12.30	\$1,108.20	\$11.31	40.30		

BU	Bargaining Unit List
NP	Negotiation Preparation
AI	Contract Administration
AGT	Tenure Grievance
UP	Unfair Practice Hearing Prep
UH	Unfair Practice Hearing Litigation

KEY

Billing Date	Service Date	Employee Contact	Employee Time	Component 1		Component 3		Component 6		Component 7	
				Bargaining Units	BU	Negotiations	NP	Contract Administration	AI	UP	UH
9/22/2004	8/12	Ron Martinez	0.30						0.30		
9/22/2005	8/2	Dolly Green	0.30						0.30		
	8/3	Dolly Green	0.30						0.30		
	8/12	Ron Martinez	0.30						0.30		
10/22/2004	9/3	Ron Martinez	0.10							0.10	
	9/13	Ron Martinez	0.50							0.50	
		John Volek	0.50							0.50	
	9/17	Ron Martinez	0.10							0.10	
	9/22	Ron Martinez	0.50							0.50	
	9/23	John Volek	0.10							0.10	
	9/23	Ron Martinez	0.10							0.10	
	9/23	John Volek	0.10							0.10	
	9/29	Ron Martinez	0.10							0.10	
	9/29	John Volek	0.50							0.50	
	9/30	Ron Martinez	0.50							0.50	
		John Volek	0.50							0.50	
10/22/2004	9/1	Ron Martinez	0.10						0.10		
	9/1	Ron Martinez	0.10						0.10		
	9/1	Dolly Green	0.40						0.40		
	9/2	Ron Martinez	0.10						0.10		
11/23/2004	10/1	Ron Martinez	0.10							0.10	
12/28/2004	11/15	Stephanie Guevara	0.90						0.90		
	11/24	Stephanie Guevara	0.10								
	11/24	Stephanie Guevara	0.30						0.10		
	11/24	Stephanie Guevara	0.10						0.30		
1/18/2005	12/14	Mandy Davies	0.30								
2/25/2005	1/27	Ron Martinez	0.30								
	1/31	Ron Martinez	0.10						0.30		
5/27/2005	4/20	Ron Martinez	0.20								
	4/21	Ron Martinez	0.20								
<b>Total Attorney Hours:</b>				<b>8.10</b>					<b>2.80</b>	<b>3.20</b>	<b>0.90</b>
<b>Total Staff Hours</b>				<b>8.10</b>					<b>0.30</b>	<b>0.90</b>	<b>0.20</b>

**STAFF:**

Mandy Davies	0.30	0.00	0.30	0.00	0.00	0.00
Dolly Green	1.00	0.00	0.00	1.00	0.00	0.00
Stephanie Guevara	1.40	0.00	0.50	0.90	0.00	0.00
Ron Martinez	3.70	0.30	0.10	0.90	2.00	0.40
John Volek	1.70	0.00	0.00	0.00	1.20	0.50
<b>Totals</b>	<b>8.10</b>	<b>0.30</b>	<b>0.90</b>	<b>2.80</b>	<b>3.20</b>	<b>0.90</b>

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

California Plaza

2180 Harvard Street, Suite 560

Sacramento, CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049



PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT  
RON MARTINEZ  
5000 ROCKLIN ROAD  
ROCKLIN CA 95677

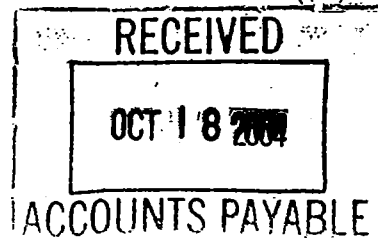
August 20, 2004

Invoice No.40161

In Reference To: James C. Maxey v. Sierra Joint CCD  
Our file: 04036/GWH

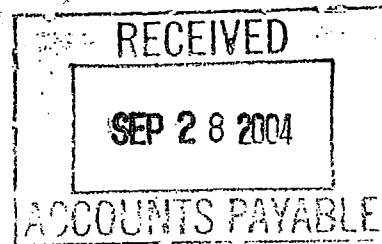
## Interim Statement for Professional Services Rendered

	<u>Hrs/Rate</u>	<u>Amount</u>
07/16/04 GWH Review of correspondence from plaintiff's counsel re: proposed arbitrators	0.10 145.00/hr	14.50
07/19/04 GWH Analysis, research and selection of proposed arbitrator	0.60 145.00/hr	87.00
07/26/04 GWH E-mail from Ron Martinez re: records request by Maxey	0.10 145.00/hr	14.50
07/27/04 GWH Review of faxed correspondence from James Maxey re: requesting copy of personnel file	0.10 145.00/hr	14.50
For professional services rendered	0.90	\$130.50
Previous balance		\$3,296.66
7/26/2004 Payment - Thank You. Check No. 09090535		(\$2,529.83)
8/2/2004 Payment - Thank You. Check No. 09090956		(\$766.83)
Total payments and adjustments		(\$3,296.66)



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PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT  
RON MARTINEZ  
5000 ROCKLIN ROAD  
ROCKLIN CA 95677

September 22, 2004

*RM* ← Ron Martinez  
Signature

Invoice No.40260

In Reference To: James C. Maxey v. Sierra Joint CCD  
Our file: 04036/GWH

**Interim Statement for Professional Services Rendered**

	<u>Hrs/Rate</u>	<u>Amount</u>
08/05/04 GWH Analysis of Maxey's request for personnel file documents, research, and preparation of proposed response	<u>0.90</u> 155.00/hr	139.50
08/06/04 GWH Preparation of correspondence to James Maxey re: request for documents pursuant to Civil Code section 1798.34	<u>0.60</u> 155.00/hr	93.00
GWH Preparation of e-mail to Ron Martinez re: proposed response to Maxey's request for documents under Civil Code section 1798.34	<u>0.10</u> 155.00/hr	15.50
08/12/04 GWH E-mail from Ron Martinez re: Maxey Request for Documents	<u>0.10</u> 155.00/hr	15.50
08/24/04 GWH Preparation of correspondence to James Maxey re: request for documents	<u>0.40</u> 155.00/hr	62.00
08/31/04 GWH Preparation of e-mail to Ron Martinez and John Volek re: pre-hearing preparation meeting	<u>0.10</u> 155.00/hr	15.50
GWH E-mail from Judy McClymonds re: Maxey preparation	<u>0.10</u> 155.00/hr	15.50
For professional services rendered	2.30	\$356.50

**Additional Charges :**

	<u>Amount</u>
08/31/04. Postal Charges for this period	1.11
Total costs	<u>\$1.11</u>
Total amount of this bill	<u>\$357.61</u>
Previous balance	\$130.50
<b>Balance due</b>	<b><u>\$488.11</u></b>

**Timekeeper Summary**

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
George W. Holt	2.30	155.00	\$356.50

*P.O. 050447*

*Combs*  
*OK to pay*

INVOICES ARE DUE AND PAYABLE UPON RECEIPT

*Jill -*  
*Do you have any*  
*record of paying the*  
*invoice for \$130.50?*  
*I don't*      *Green*

		<u>Hrs/Rate</u>	<u>Amount</u>
08/04/04	AMS Preparation of fax correspondence to Dolly Green re: certificated employee	<del>0.10</del> 145.00/hr	14.50
	GWH Preparation and attend meeting w/ Mandy Davies re: First Amendment, meetings with Millie Roberts and Joyce Lopes re: contract issues, with travel	3.80 145.00/hr	551.00
	GWH Research re: rights of banks to solicit students on campus for credit cards (Mandy Davies)	1.30 145.00/hr	188.50
	GWH Review of food services contract for NCC	0.70 145.00/hr	101.50
	GWH Preparation of e-mail to Joyce Lopes re: NCC food service contract review	0.10 145.00/hr	14.50
	GWH E-mail from Joyce Lopes re: NCC food service contract	0.10 145.00/hr	14.50
08/05/04	KMM Initial revision of free speech policy, including research and analysis re permissible limitations; time, place, and manner restrictions; recent case law	2.80 145.00/hr	406.00
08/06/04	GWH Research re: First Amendment, free speech zones, and begin preparation new regulations	7.30 145.00/hr	1,058.50
08/09/04	GWH Further research and preparation of regulations re: Free Speech	3.70 145.00/hr	536.50
08/10/04	KMM Preparation of residential construction program contract, including research and analysis re scope of applicable warranties; effect of waiver of warranty protection and risk	2.60 145.00/hr	377.00
08/11/04	KMM Review and analysis of board policies and administrative procedures re contracts, including research and analysis re duration of ongoing contracts	1.30 145.00/hr	188.50
08/12/04	AMS Initial telephone conferences with Ron Martinez and Adele Hamlett re: management employee retirement benefit questions	<del>0.40</del> 145.00/hr	58.00
	AMS Review of faxed correspondence from Ron Martinez re: health benefits issue	<del>0.20</del> 145.00/hr	29.00



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PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT

JOYCE LOPES

5000 ROCKLIN RD

ROCKLIN CA 95677

September 22, 2004

Invoice No.40247

In Reference To: Sierra Community College District - General  
Our File No. 44964  
Purchase Order No. 041889

## Interim Statement for Professional Services Rendered

	<u>Hrs/Rate</u>	<u>Amount</u>
08/02/04 AMS Lengthy telephone conference with Dolly Green re: personnel question concerning certificated employee out on disability leave and questions regarding requests for accommodations; review and analysis of voluminous faxed documents from Dolly Green and initial research re: same	2.50 145.00/hr	362.50
08/03/04 AMS Preparation of employee consent and doctor medical report forms	0.20 145.00/hr	29.00
GWH Preparation of e-mail to Greg Schneider re: printing RFP follow-up	0.10 145.00/hr	14.50
AMS Research re: legal issues raised by certificated employee accommodation request and preparation of legal memorandum concerning same	2.80 145.00/hr	406.00
AMS Telephone conferences with Dolly Green's assistant and lengthy telephone conference with Dolly Green re: recommendations concerning certificated employee out on leave and accommodation issues	0.50 145.00/hr	72.50
08/04/04 AMS Preparation of correspondence to Dolly Green re: certificated employee making accommodation requests	1.40 145.00/hr	203.00

		<u>Hrs/Rate</u>	<u>Amount</u>	
08/12/04	AMS	Review of faxed correspondence from Adele Hamlett re: health benefits issue	0.20 145.00/hr	29.00
	AMS	Review and analysis of several email correspondences from Ron Martinez and preparation of responsive email correspondences to Ron Martinez including initial research re: same pertaining to health benefits questions	0.90 145.00/hr	130.50
	AMS	Initial research of pertinent board policies and government code sections pertaining to health benefit inquiries	1.20 145.00/hr	174.00
	AMS	Telephone conferences with Attorney Ward Kallstrom re: scope of COBRA inquiry	0.20 145.00/hr	29.00
	AMS	Telephone conference with attorney Ken Ruthenberg's assistant re: COBRA inquiry	0.30 145.00/hr	43.50
	AMS	Further telephone conference with Ron Martinez and preparation of further email correspondence to Ron Martinez re: recommendations	0.40 145.00/hr	58.00
	AMS	Telephone call from attorney Ken Ruthenberg and memo to file re: same	0.10 145.00/hr	14.50
08/16/04	GWH	E-mail from Chris Brown re: contract for the Valley High Infant Toddler Center	0.10 145.00/hr	14.50
08/17/04	AMS	Preparation of correspondence to Dolly Green re: certificated employee requesting accommodations	0.60 145.00/hr	87.00
	AMS	Review and analysis of lengthy email correspondence from Dolly Green re: certificated employee on CALSTRS disability; review prior research to make recommendations regarding same	0.40 145.00/hr	58.00
	AMS	Telephone conference with Ken Ruthenberg, attorney re: benefit/COBRA questions	0.20 145.00/hr	29.00
	AMS	Preparation of email correspondence to Dolly Green	0.10 145.00/hr	14.50
08/18/04	AMS	Review and analysis of email correspondence from Dolly Green	0.40 145.00/hr	58.00

		<u>Hrs/Rate</u>	<u>Amount</u>
	including attached proposed letter to faculty member who is currently out on disability leave and has requested accommodations		
08/18/04	AMS Preparation of revisions, changes and recommendations to correspondence to faculty member for Dolly Green's consideration	1.00 145.00/hr	145.00
	AMS Preparation of email correspondence to Dolly Green concerning proposed draft letter to faculty member	0.40 145.00/hr	58.00
	AMS Further email correspondence to Dolly Green concerning proposed correspondence to faculty member	0.30 145.00/hr	43.50
08/19/04	AMS Preparation of further revisions to draft correspondence from Dolly Green re: faculty member	0.30 145.00/hr	43.50
08/20/04	GWH E-mail from Sandra Scott re: documents	0.10 145.00/hr	14.50
	AMS Review and analysis of email correspondence from Ron Martinez enclosing draft correspondence re: retirement and COBRA benefit issues	0.20 145.00/hr	29.00
	AMS Preparation of responsive email correspondence to Ron Martinez	0.20 145.00/hr	29.00
	AMS Review of email correspondence from Dolly Green	0.10 145.00/hr	14.50
08/23/04	GWH E-mail from Lawrence Lee re: payroll warrants	0.10 145.00/hr	14.50
08/24/04	GWH Telephone call to Ron Martinez re: retirement agreement	0.10 145.00/hr	14.50
	GWH Analysis of Bill Pannell retirement agreement	0.50 145.00/hr	72.50
	GWH Second telephone call to Ron Martinez re: Bill Pannell letter of resignation	0.10 145.00/hr	14.50
	GWH Preparation of e-mail to Lawrence Lee re: payroll warrants	0.10 145.00/hr	14.50
	AMS Telephone conferences with Adele Hamlett re: first amendment regulation issues (political speech issues)	0.60 145.00/hr	87.00

		<u>Hrs/Rate</u>	<u>Amount</u>
08/24/04	KMM Further research and analysis re revision of free speech policy, including limitations on solicitation and political speech	1.80 145.00/hr	261.00
08/25/04	AMS Telephone call to Adele Hamlette: first amendment speech issues	0.10 145.00/hr	14.50
08/26/04	GWH Research and analysis re: First Amendment rights of instructor running for political office to display campaign material during class/office hours, ability of instructor to discuss candidacy during class.	1.90 145.00/hr	275.50
	GWH Research re: political activity issues (Adelle Hamlett)	0.10 145.00/hr	14.50
	GWH Research re: political campaign activity in classroom	0.10 145.00/hr	14.50
	KMM Initial research and analysis re political speech in classroom/school (campaign buttons, flyers, etc)	1.30 145.00/hr	188.50
	KMM Further research and analysis re limitations in education code on political speech; review of case law re freedom of speech	1.30 145.00/hr	188.50
	AMS Review and analysis of email correspondence from Adele Hamlett re: political campaign/activity; telephone conference with Adele re: same; and initial research re: same	2.50 145.00/hr	362.50
	AMS Review of further email correspondence from Adele Hamlett	0.10 145.00/hr	14.50
	AMS Preparation of responsive email correspondence to Adele Hamlett	0.10 145.00/hr	14.50
08/27/04	KMM Further research and analysis re political speech in the classroom/school (campaign buttons, flyers, etc)	2.80 145.00/hr	406.00
08/30/04	AMS Preparation of email correspondence to Adele Hamlett	0.10 145.00/hr	14.50
	GWH E-mail from Lawrence Lee re: payroll warrants	0.10 145.00/hr	14.50

	<u>Hrs/Rate</u>	<u>Amount</u>
08/30/04 GWH E-mail from Mandy Davies re: payroll warrants	0.10 145.00/hr	14.50
08/31/04 AMS Initial review of email correspondence from Dolly Green with attachments; preparation of responsive email correspondence and initial review of first draft letter with proposed revisions	0.50 145.00/hr	72.50
AMS Review and analysis of draft correspondence to faculty member and further email correspondence to Dolly Green	0.40 145.00/hr	58.00
GWH E-mail from Ron Martinez re: analysis of detailed training guide for non-tenured evaluation committees	0.10 145.00/hr	14.50
GWH E-mail from Lawrence Lee re: payroll warrants	0.10 145.00/hr	14.50
GWH E-mail from Mandy Davies re: payroll warrants	0.10 145.00/hr	14.50
GWH E-mail from Lawrence Lee re: Carl v. Sierra College	0.10 145.00/hr	14.50
KMM Final research and analysis re political speech in the classroom/school (campaign buttons, flyers, etc), including research re use of district property to promote campaign issues; scope of permissible limitations on political activities of employees	1.70 145.00/hr	246.50
KMM Final preparation of opinion letter re questions regarding political activities of employees	1.90 145.00/hr	275.50
For professional services rendered	58.40	\$8,468.00

**Additional Charges :**

08/31/04 Photocopy Charges for this period	1.90
Facsimile Charges for this period	1.00
Postal Charges for this period	0.83
<b>Total costs</b>	<b>\$3.73</b>

<b>Total amount of this bill</b>	<b>\$8,471.73</b>
Previous balance	\$5,921.12

9/3/2004 Payment - Thank You. Check No. 09094767 (\$5,921.12)

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Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018149

October 22, 2004

PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT

RON MARTINEZ

5000 ROCKLIN ROAD

ROCKLIN CA 95677

*OK  
Ret [Signature]*

Invoice No. 40327

In Reference To: James C. Maxey v. Sierra Joint CCD  
Our file: 04036/GWH

## INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
9/3/2004 GWH Preparation for PERB hearing, including analysis of documentary evidence, selection of exhibits, begin preparation witness examination	6.80 155.00/hr	1,054.00
GWH Telephone call from Ron Martinez re: Maxey's request for copy of grievance	0.10 155.00/hr	15.50
LJ Prepare correspondence to Sam McCall re: Maxey's request for copy of formal grievance filed on May 19, 2003	0.40 75.00/hr	30.00
9/10/2004 GWH Preparation for PERB hearing	3.40 155.00/hr	527.00
9/13/2004 GWH Preparation for and attend meeting with Ron Martinez, John Volek re: preparation for PERB hearing	2.00 155.00/hr	310.00
9/14/2004 GWH E-mail from John Volek re: witnesses for hearing	0.10 155.00/hr	15.50
GWH Preparation of e-mail to John Volek re: potential witnesses for hearing	0.10 155.00/hr	15.50
GWH Research re: potential new witnesses	0.50 155.00/hr	77.50
GWH E-mail from Ron Martinez re: witnesses for hearing	0.10 155.00/hr	15.50
GWH Preparation of e-mail to John Volek re: follow-up to meeting	0.10 155.00/hr	15.50

	<u>Hrs/Rate</u>	<u>Amount</u>
9/14/2004 GWH Preparation for PERB hearing	2.50 155.00/hr	387.50
GWH Preparation of e-mail to John Volek re: Paul Hanson (potential witness)	0.10 155.00/hr	15.50
9/15/2004 GWH Preparation of e-mail to Ron Martinez re: scheduling meeting	0.10 155.00/hr	15.50
9/17/2004 GWH Further preparation for PERB hearing	4.30 155.00/hr	666.50
GWH Telephone call to Ron Martinez re: witness preparation meeting	0.10 155.00/hr	15.50
9/21/2004 GWH Preparation for meeting with District witnesses	0.50 155.00/hr	77.50
GWH Preparation of e-mail to John Volek re: request for information	0.10 155.00/hr	15.50
GWH Preparation for Maxey hearing	3.80 155.00/hr	589.00
GWH Witness Prep-John Volek	3.50 155.00/hr	542.50
LJ Review of and prepare documents for use at PERB hearing; prepare memorandum re: same; update Summation database	1.30 75.00/hr	97.50
9/22/2004 GWH Preparation for PERB hearing	4.90 155.00/hr	759.50
LJ Telephone conference with PERB General Counsel, Robert Thompson, re: Maxey's Unfair Practice Charge filed in December 2003; further updates to Summation database in preparation for PERB hearing	1.10 75.00/hr	82.50
GWH Meeting with Ron Martinez re: Witness Preparation	3.00 155.00/hr	465.00
9/23/2004 GWH Telephone call to John Volek re: witness Paul Hanson	0.10 155.00/hr	15.50
GWH Telephone call to Ron Martinez re: John Volek and Paul Hanson	0.10 155.00/hr	15.50
GWH Telephone call to John Volek re: witness Paul Hanson	0.10 155.00/hr	15.50
GWH Telephone call from Colleen Owings (American River College) re: witness Paul Hanson	0.20 155.00/hr	31.00
GWH Telephone conference with witness Paul Hanson	0.20 155.00/hr	31.00

*J. rson Schaefer & Leu*  
*Invoice No. 40327*

*October 22, 2004*

SIERRA COMMUNITY COLLEGE DISTRICT

		<u>Hrs/Rate</u>	<u>Amount</u>
9/25/2004	GWH Preparation for PERB hearing, including preparation of witness examination, cross-examination, opening statement, numerous exhibits	<u>5.20</u> 155.00/hr	806.00
	GWH Preparation of e-mail to Ron Martinez re: Maxey's 1998 employment opportunity	<u>0.10</u> <del>155.00/hr</del>	15.50
9/27/2004	GWH Further preparation for PERB hearing, including meeting with witnesses .	<u>5.90</u> 155.00/hr	914.50
	GWH Telephone call to Robin Wesley at PERB re: procedural matters	<u>0.10</u> 155.00/hr	15.50
	GWH Preparation of email to Ron Martinez re: collective bargaining agreement	<u>0.10</u> 155.00/hr	15.50
	LJ Prepare PERB exhibits, including 120 exhibits (four binders); update Summation database to include PERB Exhibit information	<u>9.20</u> 75.00/hr	690.00
9/28/2004	GWH Preparation for PERB hearing	<u>1.70</u> 155.00/hr	263.50
	GWH Attendance at PERB Hearing (day 1), with travel	<u>8.50</u> 155.00/hr	1,317.50
	GWH Further preparation for PERB hearing	<u>3.20</u> 155.00/hr	496.00
9/29/2004	GWH Further preparation for PERB hearing (day 2)	<u>1.30</u> 155.00/hr	201.50
	GWH Telephone call to Ron Martinez re: information for hearing	<u>0.10</u> <del>155.00/hr</del>	15.50
	GWH Attendance at PERB Hearing, Day 2, including travel and pre-hearing meeting with John Volek	<u>8.40</u> 155.00/hr	1,302.00
9/30/2004	GWH Preparation for hearing, Day 3, including pre-hearing meeting with Ron Martinez and John Volek	<u>2.20</u> 155.00/hr	341.00
	GWH Attendance at PERB hearing, Day 3, including travel	<u>8.60</u> 155.00/hr	1,333.00
For Professional Services Rendered		94.20	\$13,641.00

Additional Charges :

9/30/2004	Photocopy Charges for this period		0.70
	Postal Charges for this period		1.11
	Photocopy Charges for this period		187.40
	Photocopy Charges for this period		187.40
	Total additional charges		<u>\$376.61</u>

TOTAL AMOUNT DUE THIS INVOICE

\$14,017.61

*P.O. #050447*

713

*[Signature]*  
*OK to pay*



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A Professional Law Corporation

California Plaza

2180 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018149

October 22, 2004

PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT

JOYCE LOPES

5000 ROCKLIN RD

ROCKLIN CA 95677

## Invoice No.40305

In Reference To: Sierra Community College District - General  
Our File No. 44964  
Purchase Order No. 041889

### INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
9/1/2004 AMS Further preparation of revisions to draft letter to Carolyn Angleton requesting accommodations after review and analysis of Angleton's physician's report concerning accommodations	0.50 155.00/hr	77.50
AMS Preparation of correspondence to Dolly Green re: Carolyn Angleton	0.30 155.00/hr	46.50
GWH E-mail from Judy McClymonds re: meeting with Ron Martinez and John Volek	0.10 155.00/hr	15.50
GWH Analysis of detailed training guide for non-tenured evaluation committees	0.80 155.00/hr	124.00
GWH Telephone call to Ron Martinez re: current faculty contract	0.10 155.00/hr	15.50
GWH Telephone call to Ron Martinez re: request for collective bargaining agreement information	0.10 155.00/hr	15.50
AMS Further preparation of extensive correspondence to Adele Hamlett re: political campaign/activity	0.30 155.00/hr	46.50
AMS Lengthy telephone conference with Dolly Green re: interactions with faculty member requesting accommodations and recommendations re: same	0.40 155.00/hr	62.00
AMS Preparation of email correspondence to Dolly Green re: suggested revisions to letter to FUSE manager	0.40 155.00/hr	62.00

		<u>Hrs/Rate</u>	<u>Amount</u>
9/1/2004	AMS Review of faxed correspondence from Dolly Green re: attaching letter from Business Manager (FUSE)	0.10 155.00/hr	15.50
	AMS Review of faxed correspondence from Dolly Green re: Angleton's doctor's letter	0.10 155.00/hr	15.50
9/2/2004	AMS Review of further email correspondence from Adele Hamlett	0.10 155.00/hr	15.50
	AMS Review and analysis of email correspondence from Adele Hamlett re: question concerning request for mailing address information from president's office; research re: public records act and exceptions; research re: applicable privacy laws; preparation of extensive responsive email correspondence	2.00 155.00/hr	310.00
	AMS Review of email correspondence from Greg Schneider, Purchasing Supervisor, Sierra and preparation of responsive email correspondence	0.20 155.00/hr	31.00
	GWH Second telephone call to Ron Martinez re: checklist analysis	0.10 155.00/hr	15.50
	GWH Research re: Public Records Act and request for District mailing list, exemptions for employee names/addresses, personal information	0.90 155.00/hr	139.50
	GWH Preparation of e-mail to Ron Martinez containing proposed changes to checklist for non-tenure evaluation training	0.10 155.00/hr	15.50
	GWH Telephone call to Ron Martinez re: checklist review	0.10 155.00/hr	15.50
	GWH Further analysis of checklist for non-tenure evaluation training, including review of draft SCFA Article 19 (evaluation)	1.50 155.00/hr	232.50
9/3/2004	AMS Telephone call from Adele Hamlett and review of email correspondence from Adele Hamlett; initial research re: public records questions raised	0.30 155.00/hr	46.50
	KMM Further preparation of free speech policy, including review and analysis of recent case law re permissible limitations; analysis of Education Code sections and policies re solicitation and political speech	1.60 155.00/hr	248.00
	GWH Preparation of email to Adelle Hamlett re: answers to Public Records Act questions.	0.20 155.00/hr	31.00
	GWH Research re: Public Record Act issues.	0.50 155.00/hr	77.50
9/7/2004	AMS Research re: issues raised by Adele Hamlett; further telephone conference with Ms. Hamlett re: research; preparation of faxed correspondence to Adele Hamlett	0.50 155.00/hr	77.50
	GWH Research re: whether Los Rios Community College District received similar Public Records Act re: attorneys, fees, auditors	0.30 155.00/hr	46.50
	AMS Preparation of responsive email correspondence to Adele Hamlett	0.10 155.00/hr	15.50

# JOHNSON SCHACHTER & LEWIS

A PROFESSIONAL LAW CORPORATION

CALIFORNIA PLAZA

2180 HARVARD STREET, SUITE 560

SACRAMENTO, CALIFORNIA 95815

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EMAIL: info@jsl-law.com

ROBERT H. JOHNSON †  
ALESA M. SCHACHTER  
LUTHER R. LEWIS  
GEORGE W. HOLT ††  
KELLIE M. MURPHY  
FORD R. SMITH \*  
DAVID S. WOMACK  
CHARLOTTE E. HEMKER-SMITH\*\*\*†††  
SUSANNE M. SHELLEY \*\*\*

\*A PROFESSIONAL CORPORATION  
\*\* OF COUNSEL  
\*\*\* EMERITUS  
† ALSO ADMITTED IN NEW YORK  
†† ALSO ADMITTED IN OREGON  
††† ALSO ADMITTED IN MAINE

October 26, 2004

**PRIVILEGED AND CONFIDENTIAL**

Ron Martinez  
Sierra Community College District  
5000 Rocklin Road  
Rocklin, CA 95677

Re: James C. Maxey v. Sierra Joint CCD  
Our File No.: 04036/GWH

Dear Mr. Martinez:

Enclosed, please find the following vendor bill which has been reviewed and deemed appropriate for payment. Please remit directly to the vendor.

Vendor	Invoice	Amount Due	Description
Capitol Electronic Reporting	42017	\$563.30	Hearing

Thank you in advance for your prompt attention to this matter.

Very truly yours,

JOHNSON SCHACHTER & LEWIS  
A Professional Law Corporation

DENISE DE LA PENA  
Billing Assistant

Enclosures

		<u>Hrs/Rate</u>	<u>Amount</u>
12/2004	GWH Telephone call to Stephanie Guevara re: contract for residential construction program	0.20 155.00/hr	31.00
	GWH Telephone call to Chief Lonnie Schwenk re: proposal for collection of fees	0.10 155.00/hr	15.50
	GWH Exchange of e-mail with Millie Roberts re: whether Board must approve contract awarded by bid, with research	0.50 155.00/hr	77.50
	GWH E-mail from Stephanie Guevara re: evaluation objectives	0.10 155.00/hr	15.50
10/13/2004	GWH Preparation of e-mail to Michael Declues re: Carl case	0.10 155.00/hr	15.50
	GWH Telephone call to Mandy Davies re: Carl document request	0.10 155.00/hr	15.50
	GWH Telephone conference with attorney Michael Declues re: additional documents for Carl case	0.10 155.00/hr	15.50
	GWH Extensive conference call with Michael Declues, Lawrence Lee, Mandy Davies and others re: Carl case.	1.30 155.00/hr	201.50
	GWH Analysis of Agreement for Student Carpentry Services	1.20 155.00/hr	186.00
	GWH E-mail from Linda Nash re: Agreement for Student Carpentry Services	0.10 155.00/hr	15.50
10/14/2004	AMS Review of correspondence from counsel for workers' compensation carrier re: Debra Furtado	0.10 155.00/hr	15.50
	GWH Review of facsimile from Mandy Davies re: concurrent enrollment program	0.10 155.00/hr	15.50
10/15/2004	GWH Telephone conference with Jeannie Leland re: benefits for Foundation employees	0.20 155.00/hr	31.00
	GWH Review of correspondence from Stephanie Guevara with enclosed Agreement for Student Carpentry Services	0.20 155.00/hr	31.00
10/18/2004	AMS Preparation of e-mail correspondence to manager	0.20 155.00/hr	31.00
10/19/2004	GWH E-mail from Lawrence Lee re: concurrent enrollment contacts (Carl)	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Ron Martinez and Lawrence Lee re: whether training for adjunct faculty is a loading factor	0.10 155.00/hr	15.50
	GWH E-mail from Ron Martinez re: training as potential loading factor	0.10 155.00/hr	15.50

		<u>Hrs/Rate</u>	<u>Amount</u>
10/20/2004	GWH Preparation for meeting re: student carpentry students	0.80 155.00/hr	124.00
	GWH Meeting re: Student Carpentry Services with Stephanie Guevara and others, plus travel	4.00 155.00/hr	620.00
10/22/2004	GWH E-mail from Stephanie Guevara re: Construction Technology program	0.10 155.00/hr	15.50
	GWH E-mail from Lawrence Lee re: Construction Technology program	0.10 155.00/hr	15.50
10/25/2004	KMM Research and analysis re effect of hours for state-mandated training on 60% load limit for part-time temporary employees; preparation of memorandum re same	1.60 155.00/hr	248.00
	AMS Telephone call from Ron Martinez	0.10 155.00/hr	15.50
	AMS Review e-mail correspondence from Lawrence Lee re: load factor	0.10 155.00/hr	15.50
10/27/2004	AMS Preparation of responsive e-mail correspondence to Lawrence Lee	0.20 155.00/hr	31.00
	AMS Telephone conference with Lawrence Lee re: service on Board members of Carl litigation	0.20 155.00/hr	31.00
	GWH E-mail from Karen Walters Dunlap re: Blue Canyon Observatory	0.20 155.00/hr	31.00
	AMS Review e-mail correspondence from Lawrence Lee re: Carl v. Sierra College	0.10 155.00/hr	15.50
	AMS Review e-mail correspondence from Lawrence Lee re: recent service in Carl v. Coast matter	0.10 155.00/hr	15.50
	AMS Preparation of responsive e-mail correspondence to Lawrence Lee re: recent service in Carl v. Coast matter	0.20 155.00/hr	31.00
10/28/2004	AMS Preparation of further responsive e-mail correspondence to Lawrence Lee re: Carl v. Coast litigation matter	0.20 155.00/hr	31.00
	AMS Review of e-mail correspondence from Lawrence Lee re: age requirement for drivers of District vehicles and legality of same	0.10 155.00/hr	15.50
	AMS Preparation of responsive e-mail correspondence to Lawrence Lee re: age requirement for drivers of District vehicles and legality of same	0.20 155.00/hr	31.00
	AMS Review further e-mail correspondence from Lawrence Lee	0.10 155.00/hr	15.50
	AMS Review further e-mail correspondence from Lawrence Lee re: proposed requirements for driving District vehicles	0.10 155.00/hr	15.50

*Invoice No 40397*

	<u>Hrs/Rate</u>	<u>Amount</u>
29/2004 KMM Preparation of e-mail correspondence to Lawrence Lee re effect of required training on 60% load limit for part-time instructors, including review and analysis of collective bargaining agreement re same	1.40 155.00/hr	217.00
GWH Exchange of e-mail with Lawrence Lee re: evening supervision	0.30 155.00/hr	46.50
GWH Preparation of e-mail to Morgan Lynn re: Blue Canyon Observatory	0.10 155.00/hr	15.50
AMS Telephone conference with superintendent re: personnel issues and recommendations	0.40 155.00/hr	62.00
For Professional Services Rendered	<u>22.60</u>	<u>\$3,503.00</u>
Additional Charges :		
9/30/2004 WestLaw research charges for September 2004		<u>87.63</u>
Total additional charges		\$87.63
TOTAL AMOUNT DUE THIS INVOICE		<u>\$3,590.63</u>
Previous balance		\$3,435.40
Accounts receivable transactions		
8/2004 Payment - Thank You. Check No. 9101141		(\$3,435.40)
Total payments and adjustments		(\$3,435.40)

Timekeeper Summary

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Alesa M. Schachter	4.30	155.00	\$666.50
George W. Holt	12.90	155.00	\$1,999.50
Kellie M. Murphy	5.40	155.00	\$837.00

*P.O. 050447*

*\* [Signature] or to pay*

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

California Plaza

2180 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

November 23, 2004

PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT

RON MARTINEZ

5000 ROCKLIN ROAD

ROCKLIN CA 95677

Invoice No.40379

In Reference To: James C. Maxey v. Sierra Joint CCD  
Our File: 04036/GWH

## INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
10/1/2004 GWH Telephone call from Ron Martinez re: Maxey PERB hearing	<u>0.10</u> 155.00/hr	15.50
For Professional Services Rendered	0.10	\$15.50
Additional Charges :		
9/28/2004 Mileage to PERB hearing, Day 1		5.63
Parking during PERB hearing, Day 1		10.00
9/29/2004 Mileage to PERB hearing, Day 2		5.63
Parking during PERB hearing, Day 2		10.00
9/30/2004 WestLaw research charges for September 2004		87.63
Mileage to PERB hearing, Day 3		5.63
Parking during PERB hearing, Day 3		10.00
Total additional charges		\$134.52
TOTAL AMOUNT DUE THIS INVOICE		<u>\$150.02</u>
Previous balance		\$14,505.72
Accounts receivable transactions		
10/25/2004 Payment - Thank You. Check No. 09100366		(\$357.61)
11/8/2004 Payment - Thank You. Check No. 9101141		(\$14,017.61)
Total payments and adjustments		(\$14,375.22)

PO # 050447

X *[Signature]*  
OK to pay

*[Signature]*  
11/3/04

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A Professional Law Corporation

California Plaza

2180 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

December 27, 2004

PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT

RON MARTINEZ

5000 ROCKLIN ROAD

ROCKLIN CA 95677

Invoice No. 40466

In Reference To: James C. Maxey v. Sierra Joint CCD  
Our File: 04036/GWH

## INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
11/4/2004 GWH Preparation of closing PERB brief	<u>3.00</u> 155.00/hr	465.00
11/5/2004 GWH Further preparation of closing PERB brief	<u>3.70</u> 155.00/hr	573.50
11/9/2004 GWH Further preparation Maxey brief	<u>2.50</u> 155.00/hr	387.50
11/11/2004 GWH Further preparation closing brief	<u>3.30</u> 155.00/hr	511.50
11/12/2004 GWH Preparation of closing brief	<u>5.40</u> 155.00/hr	837.00
11/15/2004 GWH Further preparation of PERB closing brief	<u>3.60</u> 155.00/hr	558.00
11/19/2004 GWH Preparation of closing brief	<u>4.50</u> 155.00/hr	697.50
11/23/2004 GWH Preparation of closing brief	<u>3.70</u> 155.00/hr	573.50
11/24/2004 GWH Preparation of correspondence to Maxey's counsel re: post-hearing briefs	<u>0.20</u> 155.00/hr	31.00
For Professional Services Rendered	<u>29.90</u>	<u>\$4,634.50</u>



Additional Charges :

	<u>Amount</u>
11/30/2004 Photocopy Charges for this period	0.30
Total additional charges	<u>\$0.30</u>
<b>TOTAL AMOUNT DUE THIS INVOICE</b>	<b>\$4,634.80</b>
Previous balance	\$280.52
Accounts receivable transactions	
12/6/2004 Payment - Thank You. Check No. 09101937	(\$130.50)
Total payments and adjustments	<u>(\$130.50)</u>

**ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT**

Timekeeper Summary

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
George W. Holt	29.90	155.00	\$4,634.50

P.O. 050447

*[Signature]*  
 OK to pay

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

California Plaza

2180 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

December 28, 2004

PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT

JOYCE LOPES

5000 ROCKLIN RD

ROCKLIN CA 95677

## Invoice No.40475

In Reference To: Sierra Community College District - General  
Our File No. 44964  
Purchase Order No. 041889

### INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

		<u>Hrs/Rate</u>	<u>Amount</u>
11/1/2004	KMM Review and analysis of e-mail correspondence from Lawrence Lee re revision of Board policy re reasonable accommodations	0.20 155.00/hr	31.00
	GWH E-mail from Lawrence Lee re: documents for Carl litigation	0.10 155.00/hr	15.50
	AMS Telephone call from Michael Declues re: Carl v. Coast	0.10 155.00/hr	15.50
	KMM Review and analysis of District policies re reasonable accommodations; preparation of memorandum re recommended revisions	1.60 155.00/hr	248.00
11/2/2004	GWH E-mail from Lawrence Lee re: evening supervision	0.10 155.00/hr	15.50
	AMS Preparation of further e-mail correspondence to Lawrence Lee re: Carl v. Coast litigation matter	0.30 155.00/hr	46.50
	AMS Fax correspondence to attorney Michael Declues re: Carl v. Coast	0.10 155.00/hr	15.50
	AMS Further telephone conference with attorney Michael Declues re: Carl v. Coast matter and status	0.20 155.00/hr	31.00
	AMS Review e-mail correspondence from Lawrence Lee re: Carl v. Coast matter	0.10 155.00/hr	15.50
	GWH Second e-mail from Lawrence Lee re: night/weekend supervision and FUSE agreement	0.20 155.00/hr	31.00

		<u>Hrs/Rate</u>	<u>Amount</u>
11/3/2004	GWH Preparation of e-mail to Lawrence Lee re: attendance at November 16, 2004 Board meeting re: <u>Carl</u> v. Sierra CCD	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Lawrence Lee re: evening/weekend supervision	0.10 155.00/hr	15.50
	GWH E-mail from Lawrence Lee re: attending November 16, 2004 Board meeting re: <u>Carl</u> litigation	0.10 155.00/hr	15.50
11/4/2004	GWH Preparation of email to <u>Millie Roberts</u> re: donation of observatory	0.10 155.00/hr	15.50
	GWH E-mail from <u>Millie Roberts</u> re: agenda item re: donation	0.10 155.00/hr	15.50
	GWH E-mail from <u>Millie Roberts</u> re: agenda opinion	0.10 155.00/hr	15.50
11/5/2004	KMM E-mail correspondence to/from Lawrence Lee re revision of Board policy re reasonable accommodations	0.20 155.00/hr	31.00
	GWH Preparation of email to <u>Doug Smith</u> re: Foundation and bond campaign contributions	0.10 155.00/hr	15.50
	GWH Research re: nature of appropriate Board action to accept gift of <u>observatory</u> , preparation of agenda item	1.00 155.00/hr	155.00
	GWH Preparation of e-mail to <u>Millie Roberts</u> re: accepting gift of Robotics Observatory and proper agenda language	0.10 155.00/hr	15.50
11/8/2004	KMM Further preparation of policy revision re disability accommodations	1.80 155.00/hr	279.00
11/10/2004	KMM Further review and analysis of policy re disability accommodation; preparation of extensive policy revision	2.70 155.00/hr	418.50
11/15/2004	GWH Telephone conversations with <u>Stephanie Guevara</u> analysis of SCFA contract re: procedure for evaluation of <u>tenure-track</u> faculty	0.90 155.00/hr	139.50
	GWH Conference call with <u>Ron Martinez</u> and <u>Stephanie Guevara</u> re: problem employee and evaluation	0.30 155.00/hr	46.50
11/22/2004	AMS Lengthy telephone conference with <u>Mandy Davies</u> re: personel issues	0.70 155.00/hr	108.50
11/23/2004	GWH E-mail from <u>Sonbol Aliabadi</u> re: Sutter Roseville grant	0.20 155.00/hr	31.00
11/24/2004	GWH E-mail from <u>Sonbol Aliabadi</u> re: review of grant agreement	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to <u>Sonbol Aliabadi</u> re: Sutter Roseville grant	0.10 155.00/hr	15.50

*Johnson Schachter & Lewis*

SIERRA COMMUNITY COLLEGE DISTRICT

*Inv # 40475*

*Dec 28, 04*

	<u>Hrs/Rate</u>	<u>Amount</u>
11/24/2004 GWH Telephone call to <u>Stephanie Guevara</u> re: meetings of tenure review committee	<u>0.10</u> 155.00/hr	15.50
GWH Analysis of collective bargaining agreement and ability of tenure review committee to meet without evaluatee for purpose of arriving at consensus for evaluation	<u>0.70</u> 155.00/hr	108.50
GWH Extensive telephone call to <u>Stephanie Guevara</u> re: tenure committee evaluation issues	<u>0.30</u> 155.00/hr	46.50
GWH Telephone call from <u>Stephanie Guevara</u> re: tenure review committee procedure	<u>0.10</u> 155.00/hr	15.50
For Professional Services Rendered	17.80	\$2,759.00
Additional Charges :		
10/31/2004 Photocopy Charges for this period		1.60
Facsimile Charges for this period		3.50
Total additional charges		\$5.10
<b>TOTAL AMOUNT DUE THIS INVOICE</b>		<b>\$2,764.10</b>
Previous balance		\$3,590.63
Accounts receivable transactions		
12/13/2004 Payment - Thank You. Check No. 9102326		(\$3,590.63)
Total payments and adjustments		(\$3,590.63)

**ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT**

Timekeeper Summary

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Alesa M. Schachter	2.90	155.00	\$449.50
George W. Holt	6.70	155.00	\$1,038.50
Kellie M. Murphy	8.20	155.00	\$1,271.00

*[Signature]*  
*OK to pay*

*P.O. 050447*

	Hrs/Rate	Amount
2/13/2004 GWH E-mail from Ronald Martínez re: use of part-time counselors in summer	0.10 155.00/hr	15.50
GWH Exchange of e-mail with Morgan Lynn and Bill Tsuji re: update of status of Dean Youshisumi	0.20 155.00/hr	31.00
12/14/2004 GWH Research and analysis re: use of part-time counselors during summer	0.70 155.00/hr	108.50
GWH Preparation of e-mail to Ron Martínez re: whether part-time counselors in summer included as part of 60% load	0.10 155.00/hr	15.50
AMS Lengthy telephone conferences with Mandy Davies re: tenure review committee issues involving counselor; research and recommendations re: same	0.90 155.00/hr	139.50
12/30/2004 GWH E-mail from Lawrence Lee re: insurance coverage for Foundation Board of Directors	0.10 155.00/hr	15.50
For Professional Services Rendered	4.50	\$697.50
Previous balance		\$2,764.10

**ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT**

Timekeeper Summary

ame	Hours	Rate	Amount
Alesa M. Schachter	1.40	155.00	\$217.00
George W. Holt	3.10	155.00	\$480.50

P.O. 050447

\* [Signature] OK to pay

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

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Telephone: (916) 921-5800

Tax ID #68-0018049

January 17, 2005

PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT

RON MARTINEZ

5000 ROCKLIN ROAD

ROCKLIN CA 95677

## Invoice No.40530

In Reference To: James C. Maxey v. Sierra Joint CCD  
Our File: 04036/GWH

### INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
12/9/2004 GWH Further research and preparation of closing PERB brief, including research and preparation of argument re: admissibility of email from individuals complaining about Maxey's behavior without testimony from individuals	3.70 155.00/hr	573.50
12/10/2004 GWH Further research and preparation of closing PERB brief, including research and preparation of argument re: drafting of termination documents prior to protected activity as showing lack of retaliatory intent, with notification of Maxey of non-renewal after protected activity	6.70 155.00/hr	1,038.50
12/14/2004 GWH Further research and preparation of closing PERB brief, including research and preparation of argument re: Maxey's performance issues justifying decision not to re-hire, decision would have been made without protected conduct, nexus and causation issues	3.50 155.00/hr	542.50
12/20/2004 GWH Further research and preparation of closing PERB brief, including research and preparation of argument re: nexus and causation issues re: lack of retaliatory intent	2.50 155.00/hr	387.50
12/22/2004 GWH Further research and preparation of closing PERB brief, including research and preparation of argument re: alleged lack of administrative support as causing performance issues, lack of support as retaliatory	5.50 155.00/hr	852.50
12/23/2004 GWH Further research and preparation of closing PERB brief, including research and preparation of argument re: inadmissibility, lack of weight of testimony by Maxey's witnesses as to Maxey's good conduct as coach prior to being hired at Sierra College	4.50 155.00/hr	697.50

For Professional Services Rendered

26.40 \$4,092.00

Previous balance

\$4,784.82

P.O. 050447  
727

OK to pay

	<u>Hrs/Rate</u>	<u>Amount</u>
1/5/2005 GWH E-mail from Lawrence Lee re: Carl v. Sierra College	0.10 155.00/hr	15.50
GWH E-mail from J.Michael Declues re: board meeting	0.10 155.00/hr	15.50
GWH E-mail from Lawrence Lee re: Foundation insurance coverage	0.10 155.00/hr	15.50
GWH E-mail from Adelle Hamlett re: Board retreat	0.10 155.00/hr	15.50
KMM Review and analysis of facsimile correspondence (declarations page of ASCIP MOC) from Lawrence Lee re: coverage for Sierra College Foundation and individual members of Board	0.20 155.00/hr	31.00
GWH E-mail from Lawrence Lee re: Foundation insurance issue additional information	0.10 155.00/hr	15.50
GWH Research re: Foundation insurance issue	3.30 155.00/hr	511.50
GWH Preparation of e-mail to Lawrence Lee re: Foundation insurance issue	0.10 155.00/hr	15.50
KMM Research and analysis re coverage for Foundation Board and individual members under MOU, including research and analysis re policy language; individual liability	2.30 155.00/hr	356.50
1/6/2005 GWH E-mail from Adelle Hamlett re: Board Retreat	0.10 155.00/hr	15.50
KMM Further review and analysis of MOU and documentation received re status of Board members; additional research and analysis re same	1.80 155.00/hr	279.00
GWH E-mail from Lawrence Lee re: upcoming Board meeting	0.10 155.00/hr	15.50
GWH E-mail from Judy McClymonds re: counselors' contract	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Lawrence Lee re: attending Board meeting	0.10 155.00/hr	15.50
GWH Preparation of extensive e-mail to Adelle Hamlett re: Brown Act	0.20 155.00/hr	31.00
1/7/2005 GWH Preparation of lengthy e-mail to Adelle Hamlett re: Brown Act and reply, with research, and exchange of numerous email with Adelle Hamlett	1.60 155.00/hr	248.00
KMM Further research and analysis re coverage for Foundation Board and individuals, including individual liability; 'volunteer status'; effect of bylaws and contract documents	2.10 155.00/hr	325.50

		<u>Hrs/Rate</u>	<u>Amount</u>
/19/2005	GWH E-mail from Lawrence Lee re: current District policies re: personal use of computers by employees	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Lawrence Lee re: District policies re: employee use of e-mail	0.10 155.00/hr	15.50
	GWH Further research, analysis and preparation of opinion re: employee use of e-mail and First Amendment issues	4.80 155.00/hr	744.00
1/20/2005	GWH Preparation of e-mail to Joanne Bodine re: Jeremy Wright sexual harassment complaint	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Adelle Hamlett re: whether Board minutes required to include time of adjournment	0.10 155.00/hr	15.50
	GWH E-mail from Adelle Hamlett re: Brown Act and Board minutes	0.10 155.00/hr	15.50
	GWH Extensive telephone conversation with Adelle Hamlet re: Brown Act, business use of email, other issues	0.40 155.00/hr	62.00
	GWH Telephone call to Pat Vitale re: First Amendment and use of District email for political issues	0.10 155.00/hr	15.50
	GWH Further preparation and research for opinion letter re: use of District e-mail and First Amendment issues	4.60 155.00/hr	713.00
	GWH Preparation of e-mail to Sandra Scott re: Tetra Tech contract	0.10 155.00/hr	15.50
	GWH Analysis of sexual harassment investigation documents re: complaint by Jeremy Wright	0.80 155.00/hr	124.00
	GWH Research and analysis re: whether Brown Act requires that Board minutes report time for adjournment of closed session	0.60 155.00/hr	93.00
1/21/2005	GWH Telephone call to Joanne Bodine re: Jerry Wright sexual harassment claim	0.30 155.00/hr	46.50
	GWH Preparation of e-mail to Jeanne Leland re: analysis of letter to Associate Dean re: administrative release time	0.10 155.00/hr	15.50
	GWH E-mail from Jeanne Leland requesting analysis of letter to Associate Dean re: administrative release time	0.10 155.00/hr	15.50
	GWH E-mail from Pat Vitale re: resolution approved by Board of Trustees	0.10 155.00/hr	15.50
	GWH Telephone call from Ron Martinez re: Public Records Act	0.10 155.00/hr	15.50
	GWH Telephone call from Joyce Lopes re: STRS death benefit	0.10 155.00/hr	15.50



	<u>Hrs/Rate</u>	<u>Amount</u>
./25/2005 GWH Telephone call from Ron Martinez re: Brown Act issues	0.20 155.00/hr	31.00
GWH E-mail from Morgan Lynn re: e-mail communication and Brown Act	0.10 155.00/hr	15.50
GWH Additional research and preparation of opinion letter re: employee use of e-mail	4.30 155.00/hr	666.50
GWH Telephone call to Ron Martínez re: Brown Act, contract issues	0.10 155.00/hr	15.50
GWH Research and preparation of language for agenda item	1.30 155.00/hr	201.50
1/26/2005 GWH Preparation of e-mail to Lawrence Lee re: SESAC and copyright issues	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Pat Vitale re: use of Sierra College e-mail	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Sandra Scott re: analysis of Tetra Tech's proposed revisions to contract	0.10 155.00/hr	15.50
AMS Telephone conference call with Vice President HR, Ron Martinez, VP Educational Services, etc., re: Brown Act questions	0.30 155.00/hr	46.50
GWH E-mail from Lawrence Lee re: SESAC and copyright issues	0.10 155.00/hr	15.50
GWH E-mail from Sue Fisher re: analysis of Board agenda	0.10 155.00/hr	15.50
GWH Analysis of Tetra Tech's response to proposed contract amendments	1.70 155.00/hr	263.50
GWH Telephone call to Pat Vitale re: existence of any potential claims	0.40 155.00/hr	62.00
1/27/2005 GWH Analysis of PERB Notice re: organization of management collective bargaining unit	0.30 155.00/hr	46.50
GWH E-mail from Lawrence Lee re: continuance of Board meeting re: (1) Carl v Sierra College, (2) Lucas v Sierra College	0.10 155.00/hr	15.50
GWH Begin research and analysis re: preparation of written statement for PERB re: new supervisory unit	4.90 155.00/hr	759.50
GWH Preparation of e-mail to Ron Martínez re: PERB notice re: supervisory employees' union	0.10 155.00/hr	15.50
GWH Telephone call to Jeanne Leland re: administrator contract analysis	0.10 155.00/hr	15.50

	<u>Hrs/Rate</u>	<u>Amount</u>
1/27/2005 GWH Analysis of administrator renewal contracts	0.70 155.00/hr	108.50
GWH Telephone call from Ron Martinez re: union formation issues	0.30 155.00/hr	46.50
GWH E-mail from Ron Martínez re: Supervisory Employees' Union	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Jeanne Leland re: preparation of administrative contracts	0.10 155.00/hr	15.50
GWH E-mail from Jeanne Leland re: administrative contract	0.10 155.00/hr	15.50
GWH E-mail from Jeanne Leland re: administrative contracts	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Sue Fisher re: analysis of Board agenda item	0.10 155.00/hr	15.50
GWH E-mail from Jeanne Leland re: analysis and preparation of revisions to administrative contracts	0.10 155.00/hr	15.50
1/28/2005 GWH Preparation of e-mail to Lawrence Lee re: (1) Carl v Sierra College, (2) Lucas v Sierra College Board appearance	0.10 155.00/hr	15.50
GWH E-mail from Lawrence Lee re: SESAC performance license	0.10 155.00/hr	15.50
GWH E-mail from Jeanne Leland re: administrative contract revisions	0.10 155.00/hr	15.50
GWH E-mail from Jeanne Leland re: definition of reorganization	0.10 155.00/hr	15.50
GWH Telephone call from Ron Martinez re: proposed supervisors' union and PERB response	0.20 155.00/hr	31.00
GWH Further research in preparation for PERB statement re: supervisors' union, including research re: union consisting of high and low level supervisors as well as educational and classified supervisors and confidential employees	5.30 155.00/hr	821.50
GWH Analysis of administrative contract and preparation of extensive revisions	3.00 155.00/hr	465.00
1/31/2005 GWH Preparation of e-mail to Jeanne Leland re: definition of reorganization	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Jeanne Leland re: additional changes to administrative contract	0.10 155.00/hr	15.50
GWH Telephone call from Ron Martinez re: PERB documents re: supervisors' union	0.10 155.00/hr	15.50

	<u>Hrs/Rate</u>	<u>Amount</u>
1/31/2005 GWH Preparation of Notice of EERA Representation Petition	0.10 155.00/hr	15.50
GWH Telephone call to Ron Martinez re: Notice of EERA Representation Petition	0.10 155.00/hr	15.50
GWH E-mail from Jeanne Leland re: request for review of agenda language	0.10 155.00/hr	15.50
GWH Additional revisions to administrative contract.	0.80 155.00/hr	124.00
GWH Research and analysis re: definition of 'reorganization' and application to reclassification of classified supervisory job duties	2.80 155.00/hr	434.00
GWH Telephone call from Jeanne Leland re: Brown Act issue	0.10 155.00/hr	15.50
GWH Research re: Brown Act issue	0.80 155.00/hr	124.00
GWH Preparation of e-mail to Jeanne Leland re: Brown Act issue	0.20 155.00/hr	31.00
GWH E-mail from Jeanne Leland re: Brown Act issue	0.10 155.00/hr	15.50
GWH Analysis of proposed agenda language	0.30 155.00/hr	46.50
GWH Preparation of e-mail to Jeanne Leland re: proposed agenda	0.10 155.00/hr	15.50
For Professional Services Rendered	84.20	\$13,051.00
Previous balance		\$3,461.60
Accounts receivable transactions		
1/18/2005 Payment - Thank You. Check No. 09103379		(\$2,764.10)
1/31/2005 Payment - Thank You. Check No. 09106280		(\$697.50)
Total payments and adjustments		-(\$3,461.60)

**ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT**

Timekeeper Summary

Name	Hours	Rate	Amount
Alesa M. Schachter	1.20	155.00	\$186.00
George W. Holt	67.90	155.00	\$10,524.50
Kellie M. Murphy	14.80	155.00	\$2,294.00
James P. Lucas	0.30	155.00	\$46.50

P.O. 050447

*[Handwritten Signature]*  
OK to pay

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

California Plaza

2180 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

March 17, 2005

PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT

RON MARTINEZ

5000 ROCKLIN ROAD

ROCKLIN CA 95677

Invoice No. 40711

In Reference To: James C. Maxey v. Sierra Joint CCD  
Our File: 04036/GWH

*OK 12/11/05  
MM  
3/22/05*

## INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

		<u>Hrs/Rate</u>	<u>Amount</u>
2/8/2005	GWH Preparation of closing brief including research and preparation of argument that Maxey's refusal to be evaluated constituted good for contract non-renewal unaffected by his filing grievances	<u>3.00</u> 155.00/hr	465.00
2/18/2005	GWH Preparation of closing brief, including research and preparation of argument that Maxey's refusal to sign 2003 contract was independent cause for failure to re-hire	<u>5.30</u> 155.00/hr	821.50
2/22/2005	DRT Telephone call to Sam McCall regarding extension of time to file concluding brief.	<u>0.10</u> 155.00/hr	15.50
	DRT Telephone call to Sam McCall regarding extension of time within which to file concluding brief.	<u>0.10</u> 155.00/hr	15.50
	DRT Correspondence to Sam McCall, opposing counsel, regarding extension within which to file concluding brief.	<u>0.10</u> 155.00/hr	15.50
2/23/2005	GWH Preparation of PERB brief, including research and preparation of argument that Maxey's status as part time employee unrelated to his protected activity	<u>3.10</u> 155.00/hr	480.50
2/25/2005	LJ Organization of exhibits used at unfair practice charge hearing (paralegal)	<u>0.30</u> 75.00/hr	22.50
	GWH E-mail from court reporter re: transcripts	<u>0.10</u> 155.00/hr	15.50
2/28/2005	GWH Final preparation of closing brief	<u>7.50</u> 155.00/hr	1,162.50

For Professional Services Rendered

<u>Hours</u>	<u>Amount</u>
19.60	\$3,014.00

Additional Charges :

2/28/2005 Photocopy Charges for this period  
 Postal Charges for this period  
 Total additional charges

8.70
8.16
<u>\$16.86</u>

TOTAL AMOUNT DUE THIS INVOICE

\$3,030.86

Previous balance

\$1,968.50

**ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT**

Timekeeper Summary

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
George W. Holt	19.00	155.00	\$2,945.00
Danielle Teeters	0.30	155.00	\$46.50
Lanee Johnson	0.30	75.00	\$22.50

PO. 050447

*\* Small  
OK to pay*

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

California Plaza

2180 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

May 27, 2005

PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT

JOYCE LOPES

5000 ROCKLIN RD

ROCKLIN CA 95677

## Invoice No. 40858

In Reference To: Sierra Community College District - General  
Our File No. 44964  
Purchase Order No. 041889

### INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

		<u>Hrs/Rate</u>	<u>Amount</u>
4/1/2005	KMM E-mail correspondence from Lawrence Lee re ADA access issues (John Monsen)	0.10 155.00/hr	15.50
4/6/2005	GWH Telephone conference with Nancy Jones of Local Teamsters 228 re: continuance of PERB settlement conference and new dates	0.10 155.00/hr	15.50
	GWH Telephone conference with assistant to Ron Martinez re: continuance of PERB hearing re: Local Teamsters 228 matter	0.10 155.00/hr	15.50
	GWH Telephone conference with Roger Smith (PERB) re: Local Teamsters 228 matter re: continuing settlement conference	0.10 155.00/hr	15.50
4/7/2005	GWH Review of purchase order for legal services.	0.10	NO CHARGE
4/8/2005	GWH Review of amended notice of settlement conference re: PERB hearing Teamsters Local 228 matter	0.10 155.00/hr	15.50
4/11/2005	GWH Preparation for sexual harassment prevention training	0.60 155.00/hr	93.00
	GWH Exchange of numerous emails with Jeanne Leland re: sexual harassment training	0.50 155.00/hr	77.50
4/12/2005	GWH E-mail from Mandy Davies re: pay v. load issue and 60% law	0.10 155.00/hr	15.50
4/13/2005	GWH E-mail from Jeanne Leland re: sexual harassment prevention training	0.10 155.00/hr	15.50

	<u>Hrs/Rate</u>	<u>Amount</u>
4/18/2005 GWH E-mail from Mandy Davies re: Requirements for Claiming Apportionment for Noncredit Courses - Self-Assessment Checklist	0.10 155.00/hr	15.50
4/19/2005 GWH Preparation of e-mail to Mandy Davies re: 60% law	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Greg Schneider re: NCC food service	0.10 155.00/hr	15.50
GWH Analysis re: food service contracts re: Grinders	0.80 155.00/hr	124.00
4/20/2005 GWH E-mail from Donna Brazil re: NCC food service vending contractor (Grinders)	0.10 155.00/hr	15.50
GWH Preparation of e-mail to attorney Robert Bonsall re: PERB hearing	0.10 155.00/hr	15.50
GWH Preparation of e-mail to attorney Robert Bonsall re: members of executive council for PERB hearing	0.10 155.00/hr	15.50
GWH E-mail from Ronald Martinez re: members of executive council	0.10 155.00/hr	15.50
GWH E-mail from Donna Brazil re: NCC food service	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Ronald Martinez re: conversation with attorney Robert Bonsall (Teamsters Union) re: supervisors' union PERB hearing	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Ronald Martinez re: supervisors' union PERB hearing	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Donna Brazil and Greg Schneider re: NCC food service (Grinders)	0.10 155.00/hr	15.50
GWH E-mail from Greg Schneider re: NCC food service	0.10 155.00/hr	15.50
GWH Preparation of extensive e-mail to Greg Schneider re: NCC food service	0.10 155.00/hr	15.50
GWH E-mail from Ron Martinez re: supervisors' union PERB hearing	0.10 155.00/hr	15.50
GWH Telephone call from Ron Martinez re: supervisors' union and PERB settlement conference	0.20 155.00/hr	31.00
GWH Telephone call from Robert Bonsall, attorney for Teamsters Union, re: PERB hearing on supervisors' union	0.20 155.00/hr	31.00
GWH Research and analysis re: application of Public Contract Code to NCC vending machine contract	3.70 155.00/hr	573.50

	<u>Hrs/Rate</u>	<u>Amount</u>
4/21/2005 GWH E-mail from Joyce Lopes re: NCC food service conference call	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Joyce Lopes re: NCC food service conference call	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Robert Bonsall re: additional information for PERB informal hearing re: supervisors' union	0.10 155.00/hr	15.50
GWH E-mail from Joyce Lopes re: NCC food service (Grinders)	0.10 155.00/hr	15.50
GWH E-mail from attorney Robert Bonsall re: request for information (supervisors' union)	0.10 155.00/hr	15.50
GWH E-mail from Ron Martínez re: SCFA release time analysis	0.10 155.00/hr	15.50
GWH E-mail from Ron Martínez re: additional information for PERB informal conference re: supervisors' union	0.10 155.00/hr	15.50
GWH Exchange of numerous e-mail with Ron Martínez and attorney Robert Bonsall (Teamsters) re: PERB hearing issues	0.80 155.00/hr	124.00
GWH Preparation of e-mail to Ron Martínez requesting additional information for supervisors' union PERB hearing	0.10 155.00/hr	15.50
GWH Telephone call to attorney Robert Bonsall re: PERB hearing on supervisors' union	0.10 155.00/hr	15.50
KMM E-mail correspondence to Lawrence Lee re John Monsen ADA compliance issue	0.10 155.00/hr	15.50
KMM E-mail correspondence from Lawrence Lee re John Monsen ADA access issue being handled by Delecia Nunnally	0.10 155.00/hr	15.50
GWH Research re: ability of District to conduct campaign opposing supervisors' union	3.40 155.00/hr	527.00
GWH Telephone call to Ron Martínez re: possible PERB settlement	0.20 155.00/hr	31.00
GWH Preparation for and attend PERB Informal Settlement Conference re: supervisors' union, with travel	2.50 155.00/hr	387.50
4/22/2005 GWH Further research re: ability of District to campaign against supervisors' union and preparation of opinion e-mail	4.40 155.00/hr	682.00
GWH Telephone call to Joyce Lopes re: Grinders contract	0.10 155.00/hr	15.50
4/25/2005 KMM E-mail correspondence from Lawrence Lee re John Monsen ADA access issue	0.10 155.00/hr	15.50



		<u>Hrs/Rate</u>	<u>Amount</u>
4/25/2005	GWH Analysis of release time provisions of SCFA contract re: District payment for union negotiators	3.20 155.00/hr	496.00
	GWH Telephone call from Millie Roberts re: potential contract with Tahoe Truckee school district for services of employee to act as District construction manager	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Ron Martínez re: SCFA contract provisions for release time	0.10 155.00/hr	15.50
4/26/2005	GWH E-mail from Ron Martínez re: Teamster's Board agenda item	0.10 155.00/hr	15.50
4/27/2005	GWH E-mail from Cathy Deutscher re: Board agenda items	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Ronald Martínez re: bargaining unit recognition and Brown Act of agenda items	0.10 155.00/hr	15.50
	GWH E-mail from Ronald Martínez re: Teamster's Board Agenda Item	0.10 155.00/hr	15.50
	GWH E-mail from Sandra Scott re: analysis of SBDC Patents in Commerce	0.10 155.00/hr	15.50
	GWH E-mail from Morgan Lynn re: analysis of potential conflict of interest issue	0.10 155.00/hr	15.50
	GWH Preparation of agenda language for open and closed session Board meetings re: supervisors' union and research re: appropriateness of classified and certificated supervisors' unions represented by same Teamsters local	0.90 155.00/hr	139.50
4/28/2005	GWH Research and analysis of potential conflict of interest query from Trustee Klein	2.90 155.00/hr	449.50
	GWH Analysis of proposed agenda item for supervisors' unit and preparation of amendments	0.50 155.00/hr	77.50
	GWH Preparation of e-mail to Morgan Lynn re: conflict of interest analysis	0.10 155.00/hr	15.50
	GWH E-mail from Jeanne Leland re: wording for Board agenda item for result of PERB informal hearing on supervisors' union	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Jeanne Leland re: Board agenda language for supervisors' union	0.10 155.00/hr	15.50
	GWH E-mail from Jeanne Leland re: wording for Board agenda item -- supervisors' collective bargaining units	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Morgan Lynn re: analysis of conflict of interest query	0.10 155.00/hr	15.50

		<u>Hrs/Rate</u>	<u>Amount</u>
5/6/2005	KMM Sierra CCD Sexual Harassment Training (includes .8 travel roundtrip travel time)	2.80 155.00/hr	434.00
	KMM Review and analysis of e-mail correspondence from Lawrence Lee to John Monsen re ADA accommodation issue	0.20 155.00/hr	31.00
5/10/2005	GWH Telephone call to Roger Smith (PERB) re: supervisors' union	0.10 155.00/hr	15.50
	GWH Research re: supervisors' union recognition process under EERA and PERB, rights of District to oppose unionization, limits on supervisors' unions	4.60 155.00/hr	713.00
	GWH Telephone call to Ron Martinez re: information from Roger Smith	0.10 155.00/hr	15.50
	GWH E-mail from Sandra Scott re: PIC	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Ron Martínez re: attending Board meeting	0.10 155.00/hr	15.50
	GWH E-mail from Ron Martínez re: attending closed session Board meeting	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Ron Martínez re: Board meeting	0.10 155.00/hr	15.50
	GWH Preparation for and attend Sierra Board Meeting, with travel	2.00 155.00/hr	310.00
5/11/2005	GWH Preparation of e-mail to Ron Martínez re: Board meeting	0.10 155.00/hr	15.50
5/12/2005	GWH Telephone call to Roger Smith (PERB) re: Board recognition of supervisors' unions	0.10 155.00/hr	15.50
	GWH Preparation of draft regulation governing free speech activities and permit process	6.00 155.00/hr	930.00
	GWH Telephone call from Roger Smith re: Board recognition of supervisors' unions	0.10 155.00/hr	15.50
	GWH Preparation of correspondence to Roger Smith (PERB) re: Board recognition of supervisors' unions	0.30 155.00/hr	46.50
	GWH Preparation of e-mail to Ronald Martínez re: Board meeting	0.10 155.00/hr	15.50
	GWH E-mail from Ronald Martínez re: Board meeting	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Lonnie Schwenk re: First Amendment and permit process	0.10 155.00/hr	15.50

		<u>Hrs/Rate</u>	<u>Amount</u>
5/20/2005	KMM Review correspondence regarding John D. Monsen (ADA access issue)	0.10 155.00/hr	15.50
5/23/2005	KMM Analysis and revision of Board policies re ADA accommodations	2.40 155.00/hr	372.00
	KMM Further research and analysis re John Monsen ADA accommodation issue, including effect of DMV denial of handicapped parking placard; independent obligations under ADA; accommodation requirements; DOJ standards re accommodations re asthma	3.60 155.00/hr	558.00
5/24/2005	AMS Telephone conference with President Lynn	0.30 155.00/hr	46.50
	AMS Telephone conference with Vida Thomas (independent investigator)	0.20 155.00/hr	31.00
	AMS Further telephone conference with Ron Martinez	0.20 155.00/hr	31.00
	AMS Telephone conference with Ron Martinez re: Vida Thomas independent investigation of Nunley's discrimination complaint; telephone call to President Morgan Lynn; telephone call to Vida Thomas	0.80 155.00/hr	124.00
	GWH Research re: Mechatronics and public bid requirements	5.50 155.00/hr	852.50
	GWH E-mail from Sandra Scott re: Mechatronics equipment public bidding issues	0.10 155.00/hr	15.50
	GWH E-mail from Adele Hamlett re: Board retreat closed session and Brown Act issues	0.10 155.00/hr	15.50
	GWH E-mail from Ron Martinez re: negotiating with new supervisors' unions	0.10 155.00/hr	15.50
	GWH E-mail from Greg Schneider re: Mechatronics bids	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Adele Hamlett re: Board votes necessary to convey easement	0.10 155.00/hr	15.50
	GWH E-mail from Adele Hamlett re: procedure for Board voting to approve easement	0.10 155.00/hr	15.50
5/25/2005	GWH E-mail from Tina Ludutsky-Taylor re: request for legal opinion on campus development	0.10 155.00/hr	15.50
	GWH Telephone call to Ron Martinez re: negotiations with supervisors' unions	0.10 155.00/hr	15.50
	GWH E-mail from Jeanne Leland re: Workers Comp question (SCRMA)	0.10 155.00/hr	15.50

	<u>Hrs/Rate</u>	<u>Amount</u>
5/27/2005 GWH E-mail from Joyce Lopes re: bid bond issue	0.10 155.00/hr	15.50
GWH Research and analysis re: requirement of bid bond	4.30 155.00/hr	666.50
GWH E-mail from Michael Halbern re: bid bond	0.10 155.00/hr	15.50
GWH E-mail from Joyce Lopes re: bid bond requirement	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Tina Ludutsky-Taylor re: summary of the May 12, 2005, Consultation Council meeting	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Tina Ludutsky-Taylor re: summary of the May 12, 2005, Consultation Council meeting	0.10 155.00/hr	15.50
GWH E-mail from Sandra Scott re: urgent bid question	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Joyce Lopes re: urgent bid bond issue	0.10 155.00/hr	15.50
5/31/2005 GWH E-mail from Lawrence Lee re: Labor Compliance contract (OCIP)	0.10 155.00/hr	15.50
GWH E-mail from Lawrence Lee re: analysis of numerous OCIP documents	0.10 155.00/hr	15.50
For Professional Services Rendered	<u>70.10</u>	<u>\$10,865.50</u>
Additional Charges :		
4/30/2005 WestLaw research charges for April 2005		93.30
5/31/2005 Photocopy Charges for this period		246.90
Postal Charges for this period		2.96
Total additional charges		<u>\$343.16</u>
<b>TOTAL AMOUNT DUE THIS INVOICE</b>		<u><b>\$11,208.66</b></u>
Previous balance		\$7,164.56

**ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT**

Timekeeper Summary

Name	Hours	Rate	Amount
Alesa M. Schachter	2.60	155.00	\$403.00
George W. Holt	51.00	155.00	\$7,905.00
Kellie M. Murphy	16.50	155.00	\$2,557.50

*P.O. 050447*

01-00-00-672000-5730-00-31

741

*\* [Signature]*  
OK to pay

		<u>Hrs/Rate</u>	<u>Amount</u>
6/9/2005	GWH E-mail from Karen Walters Dunlap re: part-time faculty employment	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Sandra Scott re: consent	0.10 155.00/hr	15.50
	GWH E-mail from Sandra Scott re: SBA consent for disclosure form	0.10 155.00/hr	15.50
	GWH Telephone call from Dr. Ron Martinez re: transgender employee and worker's compensation subpoena	0.20 155.00/hr	31.00
	GWH Telephone call from Ms. Sandra Scott re: preparation of release of information form	0.10 155.00/hr	15.50
	GWH Research and analysis re: transgender issue	0.90 155.00/hr	139.50
	GWH E-mail from Ron Martinez re: notes from Gabe Marsical meeting	0.10 155.00/hr	15.50
	KMM Review and analysis of email correspondence and materials received from Ron Martinez re Gabe Mariscal; Transgender Issues	0.60 155.00/hr	93.00
	GWH Preparation of e-mail to Karen Walters Dunlap re: adjunct faculty member teaching class in pizza parlor	0.10 155.00/hr	15.50
	KMM Meeting with George Holt, Alesa Schachter, and Luther Lewis re transgender issues (Gabe Mariscal)	1.30 155.00/hr	201.50
	GWH Preparation of e-mail to Morgan Lynn re: Government Code section 53094 and local zoning controls	0.10 155.00/hr	15.50
	KMM Initial research and analysis re transgender issues (Gabe Mariscal)	1.60 155.00/hr	248.00
6/10/2005	GWH Preparation of e-mail to Karen Walters Dunlap re: Adjunct Faculty Contract Termination	0.10 155.00/hr	15.50
	GWH E-mail from Karen Walters Dunlap re: Adjunct Faculty Contract Termination	0.10 155.00/hr	15.50
	KMM Further revision of board policy re ADA accommodation, including research and analysis re same	2.80 155.00/hr	434.00
	KMM Preparation of memorandum re ADA accommodation issue (John Monsen), including research and analysis re same	2.40 155.00/hr	372.00
	KMM Further research and analysis re transgender issues (Gabe Mariscal), including necessary 'accommodations'; sensitivity training; analysis of potential issues	3.30 155.00/hr	511.50
6/13/2005	GWH Preparation of e-mail to Lawrence Lee re: inspector contract for new Math Tech building	0.10 155.00/hr	15.50

Sierra CCD  
Collective Bargaining  
F/Y 2004-2005  
NP-Negotiations Prep  
School Services  
Schools 1

<b>DATE</b>	<b>School Services</b>
July-04	1000.00
August-04	1000.00
September-04	1000.00
October-04	1000.00
12/9/04	760.00
12/10/04	320.00
12/4/04	120.00
January-05	1000.00
February-05	1000.00
March-05	1000.00
April-05	1000.00
May-05	1000.00
Jun-05	1000.00
<b>TOTALS</b>	<b>11200.00</b>



FILE NO. 73038  
P.O. BOX 60000  
SAN FRANCISCO, CA 94160-3038  
(916) 446-7517

T.I.N. 94-2447992

# INVOICE

INVOICE DATE: 07/31/04  
INVOICE NUMBER: 0045710-IN  
PAGE: 1  
P.O. #: 050450  
CLIENT CODE: 0023450 S65

SIERRA JOINT CCD  
ROBERT WICKSTROM  
5000 ROCKLIN RD  
ROCKLIN, CA 95677

RE: CC UPDATE/ CONSULTING SERVICES

DATE	DESCRIPTION	CHARGES
------	-------------	---------

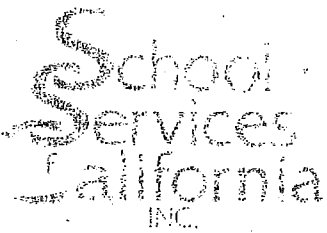
JULY 2004 SERVICES

TOTAL FEES: 1000.00

AMOUNT DUE: 1000.00

*Pay from contract*

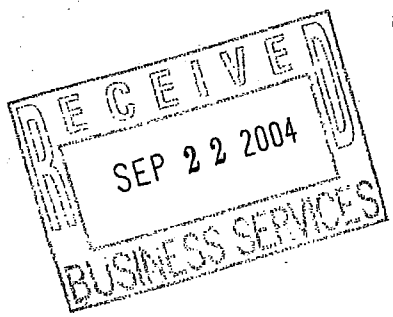
RECEIVED  
SEP 2 2004  
ACCOUNTS PAYABLE



FILE NO. 73038  
 P.O. BOX 60600  
 SAN FRANCISCO, CA 94160-3038  
 (916) 446-7517  
 T.I.N. 94-2447992

# INVOICE

SIERRA JOINT CCD  
 ROBERT WICKSTROM  
 5000 ROCKLIN RD  
 ROCKLIN, CA 95677



INVOICE DATE: 08/31/04  
 INVOICE NUMBER: 0046122-IN  
 PAGE: 1  
 P.O. #: 050450  
 CLIENT CODE: 0023450 S65

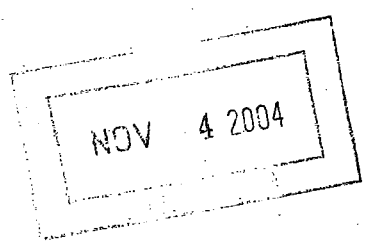
RE: CC UPDATE/ CONSULTING SERVICES

DATE	DESCRIPTION	CHARGES
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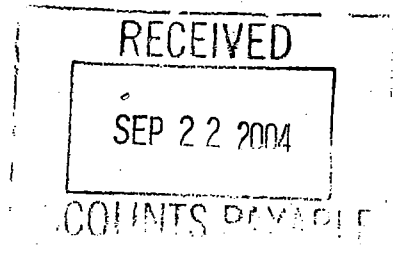
AUGUST 2004 SERVICES

TOTAL FEES: 1000.00

AMOUNT DUE: 1000.00



*Pay from contract*





School  
Services  
California

FILE NO. 73109  
P.O. BOX 65000  
SAN FRANCISCO, CA 94160-2036  
(415) 445-7517  
C.N. 94-2477992

# INVOICE

SIERRA JOINT CCD  
ROBERT WICKSTROM  
5000 ROCKLIN RD  
ROCKLIN, CA 95677

INVOICE DATE: 09/30/04  
INVOICE NUMBER: 0046581-IN  
PAGE: 1  
P.O. #: 050450  
CLIENT CODE: 0023450 S65

RE: CC UPDATE/ CONSULTING SERVICES

DATE	DESCRIPTION	CHARGES
------	-------------	---------

SEPTEMBER 2004 SERVICES

TOTAL FEES: 1000.00

AMOUNT DUE: 1000.00



*Pay from contract*

RECEIVED  
OCT 26 2004  
ACCOUNTS PAYABLE

NOV 4 2004



FILE NO. 73088  
P.O. BOX 60000  
SAN FRANCISCO, CA 94160-3088  
(916) 446-7517

T.L.N. 94 347392

# INVOICE

SIERRA JOINT CCD  
ROBERT WICKSTROM  
5000 ROCKLIN RD  
ROCKLIN, CA 95677

INVOICE DATE: 10/31/04  
INVOICE NUMBER: 0047019-IN  
PAGE: 1  
P.O. #: 050450  
CLIENT CODE: 0023450 S65

RE: CC UPDATE/ CONSULTING SERVICES

DATE	DESCRIPTION	CHARGES
------	-------------	---------

OCTOBER 2004 SERVICES

TOTAL FEES: 1000.00

AMOUNT DUE: 1000.00

NOV 29 2004

RECEIVED  
NOV 24 2004  
ACCOUNTS PAYABLE

*Pay from contract*



FILE NO. 73038  
P.O. BOX 60000  
SAN FRANCISCO, CA 94160-3038  
(916) 446-7517

T.I.N. 94-2447992

# INVOICE

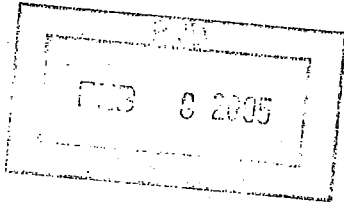
INVOICE DATE: 12/31/04  
INVOICE NUMBER: 0047887-IN  
PAGE: 1  
P.O. #: PER AGREEMENT  
CLIENT CODE: 0023450 S65A

SIERRA JOINT CCD  
RON MARTINEZ, ASSOC VICE PRES.  
5000 ROCKLIN RD  
ROCKLIN, CA 95677

*December 04*

RE: COMPENSATION EVALUATION TESTS

DATE	DESCRIPTION	CHARGES
12/09/04	KEN HALL MEET WITH EMPLOYEE ORGANIZATIONS REGARDING COMPARABLE DATA	4.75 760.00
12/10/04	KEN HALL PREPARATION OF MEMO REGRARDING COMPARATIVE SALARIES	2.00 320.00
1 11/04	KEN HALL CONSULTING FOR CLIENT	.75 120.00



TOTAL FEES: 1200.00

AMOUNT DUE: 1200.00

*Jill -  
P.O. coming  
Reg #344856 to  
Purchasing 1/31/05  
Jillie*

*OK to pay  
authorized by Ron's office  
per tri party sub group*



FILE NO. 73038  
 P.O. BOX 60000  
 SAN FRANCISCO, CA 94160-3038  
 (916) 446-7517  
 T.I.N. 94-2447992

# INVOICE

SIERRA JOINT CCD  
 ROBERT WICKSTROM  
 5000 ROCKLIN RD  
 ROCKLIN, CA 95677

INVOICE DATE: 01/31/05  
 INVOICE NUMBER: 0048325-IN  
 PAGE: 1  
 P.O. #: 050450  
 CLIENT CODE: 0023450 S65

RE: CC UPDATE/ CONSULTING SERVICES

DATE	DESCRIPTION	CHARGES
------	-------------	---------

JANUARY 2005 SERVICES

TOTAL FEES: 1000.00

RECEIVED  
 MAR 1 2005  
 ACCOUNTS PAYABLE

AMOUNT DUE: 1000.00

*Pay from contract*

MAR 10 2005



FILE NO. 73038  
P.O. BOX 60000  
SAN FRANCISCO, CA 94160-3038  
(916) 446-7517

T.N. 94-2447992

# INVOICE

INVOICE DATE: 02/28/05  
INVOICE NUMBER: 0048747-IN  
PAGE: 1  
P.O. #: 050450  
CLIENT CODE: 0023450 S65

SIERRA JOINT CCD  
ROBERT WICKSTROM  
5000 ROCKLIN RD  
ROCKLIN, CA 95677

RE: CC UPDATE/ CONSULTING SERVICES

DATE	DESCRIPTION	CHARGES
------	-------------	---------

FEBRUARY 2005 SERVICES

TOTAL FEES: 1000.00

RECEIVED  
MAR 31 2005  
ACCOUNTS PAYABLE

AMOUNT DUE: 1000.00

*Pay from contract*

PAID  
FEB 28 2005



FILE NO. 73038  
P.O. BOX 60000  
SAN FRANCISCO, CA 94160-3038  
(916) 446-7517

T.I.N. 94-2447992

# INVOICE

INVOICE DATE: 03/31/05

INVOICE NUMBER: 0049156-IN

PAGE: 1

P.O. #: 050450

CLIENT CODE: 0023450 S65

SIERRA JOINT CCD  
ROBERT WICKSTROM  
5000 ROCKLIN RD  
ROCKLIN, CA 95677

RE: CC UPDATE/ CONSULTING SERVICES

DATE	DESCRIPTION	CHARGES
------	-------------	---------

MARCH 2005 SERVICES

TOTAL FEES: 1000.00

PAID  
MAY 12 2005  
JILL SIMIARO

AMOUNT DUE: 1000.00

RECEIVED  
MAY 2 2005  
ACCOUNTS PAYABLE

*Pay from contract*

# School Services California INC.

FILE NO. 73038  
P.O. BOX 60000  
SAN FRANCISCO, CA 94160-3038  
(916) 446-7517  
T.I.N. 94-2447992

## INVOICE

SIERRA JOINT CCD  
ROBERT WICKSTROM  
5000 ROCKLIN RD  
ROCKLIN, CA 95677

INVOICE DATE: 04/30/05  
INVOICE NUMBER: 0049586-IN  
PAGE: 1  
P.O. #: 050450  
CLIENT CODE: 0023450 S65

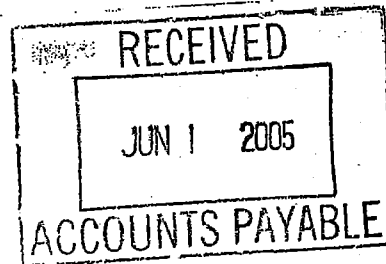
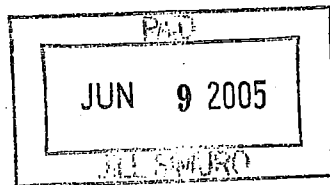
RE: CC UPDATE/ CONSULTING SERVICES

DATE	DESCRIPTION	CHARGES
------	-------------	---------

APRIL 2005 SERVICES

TOTAL FEES: 1000.00

AMOUNT DUE: 1000.00



*Pay from contract*

*OK to pay  
price  
\$1313*

# School Services California INC.

FILE NO. 73038  
 P.O. BOX 60000  
 SAN FRANCISCO, CA 94160-3038  
 (916) 446-7517

T.I.N. 94-2447992

## INVOICE

SIERRA JOINT CCD  
 ROBERT WICKSTROM  
 5000 ROCKLIN RD  
 ROCKLIN, CA 95677

INVOICE DATE: 05/31/05  
 INVOICE NUMBER: 0050023-IN  
 PAGE: 1  
 P.O. #: 050450  
 CLIENT CODE: 0023450 S65

RE: CC UPDATE/ CONSULTING SERVICES

DATE	DESCRIPTION	CHARGES
------	-------------	---------

MAY 2005 SERVICES

PAID  
 JUL 14 2005  
 JILL SIMURO

TOTAL FEES: 1000.00

RECEIVED  
 JUL 11 2005  
 ACCOUNTS PAYABLE

AMOUNT DUE: 1000.00

*ok to pay  
 Joyce Lopez*

*L-050178*





FILE NO. 73038  
 P.O. BOX 60000  
 SAN FRANCISCO, CA 94160-3038  
 (916) 446-7517  
 T.I.N. 94-2447992

# INVOICE

INVOICE DATE: 06/30/05

INVOICE NUMBER: 0050435-IN

PAGE: 1

P.O. #: 050450

CLIENT CODE: 0023450 S65

SIERRA JOINT CCD  
~~ROBERT WICKSTROM~~ ATTN: ACCOUNTS PAYABLE  
 5000 ROCKLIN RD  
 ROCKLIN, CA 95677

RE: CC UPDATE/ CONSULTING SERVICES

DATE	DESCRIPTION	CHARGES
------	-------------	---------

JUNE 2005 SERVICES

TOTAL FEES: 1000.00

AMOUNT DUE: 1000.00

233318

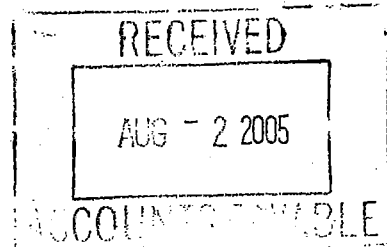
Vendor #

01.00.00.6600.01.5116.00.10

TOPS Code Object Code Ledger Ref #

*Fisher*

Payment Authorization



*Pay from contract*

60131

Sierra CCD  
Collective Bargaining  
F/Y 2004-2005  
Fact Finding  
Schedule 1

<b>DATE</b>	<b>Dollensin, Ninette</b>	<b>Thiers, Laurie</b>
11/17/2004	1.00	
11/22/2004	2.00	
4/8/2005	1.50	
4/11/2005	6.50	
4/13/2005	3.00	
4/14/2005		1.50
4/18/2005		1.00
<b>TOTALS</b>	<b>14.00</b>	<b>2.50</b>

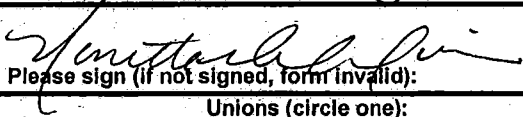
**MANDATED COST TRACKING FORM**

Date: <u>11/17/04</u>	Time: <u>1 HOUR</u> (nearest 1/4 hour)		
Parties Present:			
Grievant's Name:			
Description (Include section of contract being discussed): <u>Analysis of Over-30 Stipends comparing 17-week semester to a 16-week semester.</u>			
<u>[Signature]</u> <u>Ninette Collensin</u>			
▶ Please sign (if not signed, form invalid):			
Unions (circle one):			
<input checked="" type="radio"/> SCFA	<input type="radio"/> FUSE		
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
<input checked="" type="radio"/> ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
<input checked="" type="radio"/> IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter information, sign this form, and forward to Judy McClymonds.			

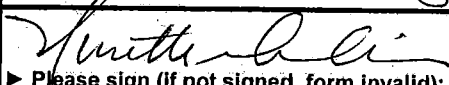
**MANDATED COST TRACKING FORM**

Date: 11/22/04	Time: 2 hours (nearest 1/4 hour)																																								
Parties Present:																																									
Grievant's Name:																																									
Description (include section of contract being discussed): <i>Analysis of over 30 stipends comparing 17-week semester to a 16-week semester</i>																																									
<div style="text-align: center;"><i>[Signature]</i></div> Please sign (if not signed, form invalid):																																									
Unions (circle one): <div style="display: flex; justify-content: space-around; align-items: center;"> <span><input checked="" type="radio"/> SCFA</span> <span><input type="radio"/> FUSE</span> </div>																																									
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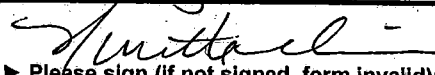
**MANDATED COST TRACKING FORM**

Date: <b>4-8-05</b>	Time: <b>1 1/2 hours</b> (nearest 1/4 hour)		
Parties Present:			
Grievant's Name:			
Description (Include section of contract being discussed): <b>Research on Compressed Calendar Pay &amp; Loading</b>			
 ▶ Please sign (if not signed, form invalid):			
Unions (circle one):			
<input checked="" type="radio"/> <b>SCFA</b> <input type="radio"/> <b>FUSE</b>			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
<input checked="" type="radio"/> <b>IF</b>	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
<b>Please enter information, sign this form, and forward to Judy McClymonds.</b>			

**MANDATED COST TRACKING FORM**

Date: <b>4-11-05</b>	Time: <b>6 1/2 hours</b> (nearest 1/4 hour)																																								
Parties Present:																																									
Grievant's Name:																																									
Description (include section of contract being discussed): <b>Research on Compressed Calendar Pay &amp; Loading</b>																																									
 ▶ Please sign (if not signed, form invalid):																																									
Unions (circle one): <div style="display: flex; justify-content: space-around; align-items: center;"> <span><input checked="" type="radio"/> <b>SCEA</b></span> <span><input type="radio"/> <b>FUSE</b></span> </div>																																									
Activity Codes (circle one):																																									
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IM	Mediation	OO	Other (please describe above)																																						
Please enter information, sign this form, and forward to Judy McClymonds.																																									

**MANDATED COST TRACKING FORM**

Date: <b>4-13-05</b>	Time: <b>3 hours</b> (nearest 1/4 hour)		
Parties Present:			
Grievant's Name:			
Description (include section of contract being discussed): <b>Research on Compressed Calendar Working hours, pay, &amp; loading</b>			
 ▶ Please sign (if not signed, form invalid):			
Unions (circle one):			
<input checked="" type="radio"/> <b>SCFA</b> <input type="radio"/> <b>FUSE</b>			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
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ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
<input checked="" type="radio"/> IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter information, sign this form, and forward to Judy McClymonds.			

**MANDATED COST TRACKING FORM**

Date: <b>4/14/05</b>	Time: <b>1.5</b> (nearest 1/4 hour)		
Parties Present:			
Grievant's Name:			
Description (include section of contract being discussed): <b>Dept Chair Stipends » PT Faculty Load + education level</b>			
<b>Laurel Thiers</b>			
▶ Please sign (if not signed, form invalid):			
Unions (circle one):			
<input checked="" type="radio"/> <b>SCFA</b> <input type="radio"/> FUSE			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
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BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
<input checked="" type="radio"/> IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
Please enter information, sign this form, and forward to Judy McClymonds.			



**MANDATED COST TRACKING FORM**

Date: <b>4/18/05</b>	Time: <b>1.0</b> (nearest 1/4 hour)		
Parties Present: <b>George Holt, Deans</b>			
Grievant's Name:			
Description (include section of contract being discussed): <b>load + pay for compressed calendar</b>			
<b>Laurie A. Thiers</b>			
▶ Please sign (if not signed, form invalid):			
Unions (circle one):			
<input checked="" type="radio"/> <b>SCFA</b> <input type="radio"/> <b>FUSE</b>			
Activity Codes (circle one):			
Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
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<input checked="" type="radio"/> <b>FF</b>	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)
<b>Please enter information, sign this form, and forward to Judy McClymonds.</b>			

Sierra CCD  
Collective Bargaining  
F/Y 2004-2005  
Negotiations (Classified)  
Schedule 2

DATE	Leland, Jeanne	Martinez, Ron	Smith, Doug
7/6/2004	2.50	2.50	
8/25/2004	3.50	3.50	3.50
9/8/2004	3.50	3.50	1.20
9/15/2004	3.00	3.00	3.00
9/29/2004	3.00	3.00	3.00
10/6/2004	3.00	3.00	3.00
10/20/2004			2.00
11/3/2004	3.00	3.00	3.00
11/10/2004	3.00	3.00	3.00
11/17/2004	3.00	3.00	
12/1/2004	3.00	3.00	
12/8/2004	3.00	3.00	
12/15/2004	3.00	3.00	3.00
1/26/2005	3.00	3.00	3.00
2/9/2005	3.00	3.00	3.00
2/16/2005	3.00	3.00	3.00
3/8/2005	3.00	3.00	3.00
4/6/2005		3.00	3.00
5/4/2005	2.50	2.50	
5/11/2005	2.50	2.50	
5/26/2005	2.00	2.00	
<b>TOTALS</b>	<b>55.50</b>	<b>58.50</b>	<b>39.70</b>

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, July 6, 2005  
Time: 2:00 – 4:30 pm  
Place: Fireside Room 2.5

For the District:  
Ron Martinez\*  
Jeanne Leland

For the Union:  
Shari Newman\*  
Bernard Acuna  
Sue Keller  
Geri Snell

\*Chief Negotiator  
Facilitator: Joanne Bodine

### I. CHECK IN

### II. RECOLLECTIONS

### III. OFF AGENDA

1. Off Agenda Subgroup not working well.  
**WWW:** Group will think about over July and discuss further @ next meeting.
  2. Computer Lab Tech: Employee housed in direct line of sight with library.  
Line of sight is to protect equipment, etc., when no one there.  
**WWW:** Shari will contact Diane to discuss further.
  3. Need to put evening stipend rate of pay on Rocklin Campus on agenda of next meeting.
  4. Language for retiree benefits includes "if permissible" (page 44, line 28) with no further definition of what it means.  
**WWW:** Jeanne will follow up with Joyce and report back.
  5. Two May 15 grievances need resolution.  
**WWW:** Ron has yet to work on them - will respond within 10 days.
  6. Henry Eimstad's assistant doing Union work.  
**WWW:** Ron will schedule meeting between Mandy, Shari, and himself to discuss further.  
**WWW:** Jeanne will loop back to Joyce and update on latest reports.
  7. Issue of classified employee and having been temporarily placed in management position and required to continue paying dues, etc. Employee believes he is "in limbo" and wants clarity regarding where he is regarding wages, etc. Current contract allows for 10% differential for those people "assigned" to perform tasks with increased responsibility.
    - In the case of Colin specifically:
      1. Paid at entry level wage range/step for the interim period
      2. Can carry over banked S/L and vacation for the interim period
      3. Will continue to pay union dues or opt for "leave of absence"
      4. Will earn vacation as a manager
      5. Retroactive to appointment date to meet FLSA mandates
- WWW:** Article 29 (especially Section 1) will be reviewed and put on next agenda.
- WWW:** Jeanne to develop straw design for dealing with interim assignments

## DISTRICT/FUSE RECOLLECTIONS

Date: **Wednesday, August 25, 2004** (1<sup>st</sup> meeting of 2004-2005)

Time: 1:30-5:00

Place: Fireside Room 35

### FOR THE DISTRICT

John Bukey

Ron Martinez\*

Doug Smith

Jeanne Leland

### FOR THE UNION

Shari Newman\*

Bernard Acuna

Carolyn Warner

Gerri Snell

Jeffrey Lloyd

\*Chief Negotiator

Facilitator: Joanne Bodine

#### • Check-In

Shari informed the group the Sue Keller is unable to continue meeting with us. Jeffrey Lloyd has agreed to take her place. Shari needs to step out at 2:00-3:00 for a meeting.

#### • Heads up, rumor control, recollections, elephants

- Recollections for 6/23/04 approved with minor changes

- Rumor control: (from 6/23/04)

Shari shared concern about rumor that FUSE "negotiated or "signed away positions" and need to clarify, particularly in Senate, where "story" started.

#### Outcome:

Shari, Ron, and Doug went to Dean's Council.

Still intend to go to Classified Senate to clarify?

Shari will handle Senate logistics.

- Lead position in Payroll (item closed)

There is currently a process for establishing a lead. This process is to be followed. Employees need to be aware that the lead is a temporary position. Ron reported that the employees involved decided not to have a lead.

- PPT converting to .50 FTE positions (item closed)

Ron provided a "heads up" that 4 of the 5 Multimedia Production Control Room Assistants will soon be converted from PPT to half-time positions with prorated benefits.

- NCC Standby Protocols (item closed)

Ron reported that he met with Tina Ludutsky-Taylor, Shari, and Bernard to discuss. Protocols were developed and approved.

- Issue of validity of side letter (pending – see today's agenda item #1)

Side letter 0304-02 and 0304-05 regarding the compensation formulas

#### Off-Agenda Items

1. Planning for the year
2. 2005-2006 Classified calendar
3. FUSE release time
4. Contracting out form
5. Temporary employee paperwork
6. Contract reprint

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, September 8, 2004

Time: 1:30-5:00

Place: LRC 201

### FOR THE DISTRICT

John Bukey

Ron Martinez\*

Doug Smith (in 3:50)

Jeanne Leland

### FOR THE UNION

Shari Newman\*

Bernard Acuna

Carolyn Warner

Gerri Snell

Jeffrey Lloyd

\*Chief Negotiator

Facilitator: Joanne Bodine

1. Check in, heads up, process check rumor control, elephants
  2. Recollections
  3. Off-Agenda
    - a. Stand by
    - b. Snacks on Friday – FUSE will bring sodas to Tri-party Retreat
    - c. \*Release time for FUSE general meeting  
FUSE wants a lunch meeting next Friday, instead of later in the day from 12-2 PM. There is concern that several offices would be adversely impacted by this change because of the date.  
WWW: FUSE will go back to their E-Board and select new date...but theoretically, a one hour release of time is okay in most circumstances.
    - d. \*SCCP request  
FUSE has a grievance at the third level that requires a SCCP request. No SCCP facilitators named for this year. Lateral transfer procedures are the issue and Dolly has refused to provide data based on confidentiality unless requested through the Department of Fair Housing. Issue is discrimination against long term employees. Ron has suggested a meeting between Ron, Shari, John and Dolly to discuss the matter further to sort it out and clarify contractual, legal, etc. issues.  
Pause – for meeting. Group will report back. Judy will schedule.
    - e. Heads up - Tri-party Formula Retreat – want to designate every other Thursday to meet.
- \*- Musts
4. Homework
    - a. Conversion follow-up...continued to 9/15
    - b. Compensatory Time vs. Cash for Overtime worked...continued to 9/15
    - c. Sunshine list...provided to group in hard copy and place on 9/14 Board of Trustees agenda
    - d. Working conditions – two employees offices were still under construction, so employee were working outside. Situation has been resolved.
    - e. Ground rules:

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, September 15, 2004

Time: 2:00-5:00

Place: Com Ed A-16

13.0

### FOR THE DISTRICT

John Bukey  
Ron Martinez\*  
Doug Smith  
Jeanne Leland

### FOR THE UNION

Shari Newman\*  
Bernard Acuna  
Carolyn Warner  
Gerri Snell  
Jeffrey Lloyd

\*Chief Negotiator

Facilitator: Joanne Bodine

### Check-in

(Heads up, process check rumor control, elephants)

Shari informed the group that Carolyn Warner will no longer be participating in negotiations with FUSE and District due to her work load demands. She will try to continue with the Tri-Party formula development.

Recollections from 9/8/04 approved.

### Agenda

#### Compensatory Time vs. Cash for Overtime

The issue is whether an employee has the right to select. Shari said there is a form in use and past practice allows it. John said the collective bargaining agreement states the opposite. Shari stated that during the recent budget crunch, management encouraged CTO. Ron said the practice is not consistent across the board, across the campus.

In Art. 10, sec. 6, the first line supervisor has the right to approve on a case by case basis. Shari is asking what does it matter if CTO time must be either taken or paid off by June 30 of the academic year earned.

WWW: John, will review Shari's research and do some of his own, he will report back, by 9/23

WWW: John, Mandy, Ron, will meet to discuss issue further, asap

#### Compressed Calendar

Shari and Gerri worked up four options regarding the calendar and distributed. Shari would like input by next meeting and Gerri will share the four options with Mandy.

#### Contract Reprint (pending)

HR is working of format.

#### Conversion Follow Up:

Workgroup met and developed historical perspective and what we'd like towards a problem statement for RFP.

WWW: Ron, continue to identify local classification consultants, asap

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, September 29, 2004

Time: 2:00-5:00

Place: LRC 201 3.0

### FOR THE DISTRICT

John Bukey  
Ron Martinez\*  
Doug Smith  
Jeanne Leland

### FOR THE UNION

Shari Newman\* (out 4:00)  
Bernard Acuna  
Gerri Snell  
Jeffrey Lloyd

\*Chief Negotiator

Facilitator: Joanne Bodine

### Check-in

(Heads up, process check rumor control, elephants)

Head's Up: Jeff reported that he will miss the 10/15 meeting due to SCCP training.

Joanne provided a head's up on an upcoming staff training event.

Process Check: Will FUSE be replacing Carolyn? Not at this time. Joanne asked how the group feels we are "tracking". Pace is good.

Recollections from 9/15/04 approved as distributed

### Off-Agenda Items

#### 1. FUSE Appointments to Hiring Committees

WWW: Ron, remind "people" that FUSE makes the appointments to the hiring committees, asap

#### 2. Upcoming Steward Training

Shari requested release time for one of the three days (11/18, 19, 20) for union steward training. The training falls on a Thursday, Friday, and Saturday. Friday, the employee would use their vacation, and Saturday is voluntary. The training will cover the responsibilities of "stewardship" with the union as well as general process training, (i.e. grievance processes). There was concern re: additional drain on existing release time bank.

Pause re-examine at next meeting with current release time issue.

WWW: FUSE group, develop release time proposal, for 10/6

#### 3. SC3 Training Session in October

21 of 30 slots are filled. Curriculum has been updated.

WWW: Shari, encourage FUSE members to sign up, asap

#### 4. Pending Reclassification Item

There are two classified employees currently receiving out-of-class pay. An Executive Committee agenda item is pending to place these two employees in the appropriate range permanently instead of continuing on-going out-of-class pay.

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, October 6, 2004

Time: 2-5:00PM

Place: LR 201

3.0

### For the District:

John Bukey

Ron Martinez\*

Doug Smith

Jeanne Leland

### For the Union:

Shari Newman\*

Bernard Acuna

Gerri Snell

Jeff Lloyd

\*Chief Negotiator

Facilitator: Joanne Bodine

### Check-In

Rumor: 10/11 Training session canceled – discussion. The District and the Union have agreed to reconsider the approach and changes will become apparent over time.

Recollections of 9/29/04 - approved

### Recollections

WWW's

#### A. To be continued:

- Conversion follow-up
- Contract reprint
- Compressed calendar (5<sup>th</sup> option being developed-another Xmas break option)
- Temp. positions/pay
- Standby (+M-T & pay if "on call")
- Faculty supervision of classified staff
- Reclassification item
- Safety apparel for Transportation Dept.

#### B. Closed

- SC3 training
- SCCP request
- FUSE appointments to hiring committees

#### C. Open

- Release time
- Comp vs. cash for overtime – continue
- Grievance protocols – continue
- Evaluation (Ron will email Los Rios evaluation to group)
- Permanent part time
- Rewrite contract
- Article 26 classification



## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, October 20, 2004

Time: 2-4:00PM

Place: LR 201

2-0

### For the District:

John Bukey

Ron Martinez\* (absent)

Doug Smith

Jeanne Leland (absent)

### For the Union:

Shari Newman\*

Bernard Acuna

Gerri Snell

\*Chief Negotiator

Facilitator: Joanne Bodine

### Check-In

### Recollections

Accepted as written

### Off-Agenda

- A. Retiree Health Benefits
- B. Side Letter for Signature RE: Compensation
  - Hold until after 11/2, then ratify in time for 11/16 meeting
  - Issue of ending balance projected to increase by .05 or \$8K total
  - Doug wants to increase each union's discretionary bucket from \$25K to \$29K
  - SCFA has agreed to this method of distribution

**WWW:** How to handle any under/overage of fund balance distribution beyond .33  
Will discuss on 11/4 at Formula Meeting when Neil is here  
Doug will alert SCFA at next meeting (10/28)

- C. 11/3 Meeting
  - Mandy will be here to discuss
    - Classified calendar for 05-06
    - O/T and method of payment
- D. Retiree Health Benefits
  - Classified staff believe it is unfair that teachers can purchase health insurance after retirement, while classified staff cannot (per Ed. Code 7000)
  - Johns wondered whether there was a comparable section for classified which provides the same benefit.

**WWW:** John will research Ed. Code and Shari will research Board Policy for report back on 11/3

- E. Faculty Supervision of Classified Staff
  - FUSE received the list of faculty who supervise classified staff and were surprised at high #
  - Shari wondered whether it was legally permissible for faculty to do so

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, November 3, 2004  
Time: 2-5:00PM  
Place: LR 201

3.0

For the District:  
John Bukey  
Ron Martinez\*  
Doug Smith  
Jeanne Leland

For the Union:  
Shari Newman\*  
Bernard Acuna  
Gerri Snell  
Jeff Lloyd  
Carolyn Warner

\*Chief Negotiator  
Facilitator: Joanne Bodine

### I. Check-In

### II. Rumor Control

- Attendance at next Board meeting on November 16, 2004
- Post '94 checks are in trust fund
- A&R moving forward in positive ways. Gail and Marti doing very well. There are still some issues... old vs. young... but overall okay.

### III. Off-Agenda

- A. Tentative Agreement for Compensation follow-up
- The percentage over fund balance of 8% - Previous agreement reflected 9.0%, turns out to be 9.05%. Additional \$4,000 to be added to \$25,000. Doug took same .05% discussion to SCFA and they agreed to include \$4K into union discretionary fund this year and starting next year the \$4K would go into the base.
  - **Consensus** (including SCFA) regarding inclusion in bucket discretionary funds this year and into formula in future.
  - District will need to get interests of new board members to carry forward to formula discussion.
  - John Lervold, Jim Weir, Doug have been meeting as tripartite subcommittee to analyze "P/NP" data for report on funding sources at next tripartite meeting.
- B. Faculty supervising Classified
- SCFA knows that FUSE will be bringing up the issue at next tripartite meeting. Discussion of issue will be after the formula development.
- C. Off-site retreat scheduled in November to deal with unhappy employee's and their issues

### IV. Issues

- A. Post '94 Checks
- Checks have been deposited in trust fund. There are misunderstandings regarding fund and distrust of Shari and Jeanne because of some start up problems. Trust fund Board is convening to clarify issues.

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, November 10, 2004  
Time: 2-5:00PM  
Place: LR 201

For the District:  
John Bukey  
Ron Martinez\*  
Doug Smith  
Jeanne Leland

For the Union:  
Shari Newman\*  
Bernard Acuna  
Gerri Snell  
Jeff Lloyd (absent)  
Carolyn Warner

\*Chief Negotiator  
Facilitator: Joanne Bodine  
Guest: Robin Hargrove

### I. Check-In

John shaved his goatee – all participants polled and reached consensus that he looks younger.  
Recollections from 11/3/04 approved.

### II. Rumor Control

Bernard asked last meeting about a rumor he'd heard regarding additional supervisory positions in Plant Ops area. Doug responded that with the passage of the bonds, there is additional work to develop facilities in Tahoe and NCC as specified in the bonds. His office is looking at how the passage of the bonds will effect staffing. Currently Ray has 32 direct reports. Ray will probably be assigned to Tahoe and NCC projects and two supervisory positions will be added and will split the number of direct staff reporting. One of the supervisory positions was already approved by Exec and budgeted. This position will probably be going forward, asap. Money from the bonds will begin coming in March. This discussion will be brought up at Strategic Council.

### III. Off-Agenda

- A. Clarification re: coaching (stipend) and 40 hours workweek
- Coaches sometime work in other jobs at Sierra and are paid hourly (two FUSE employees currently) - coaches are paid a stipend
  - Question: Should hours be added on to work hours, and overtime paid when exceed 40 hours weekly?
  - Ron had researched and FLSA not applicable to "stipends," which are not calculated based on hours worked.
- B. Timeframe for faculty supervising classified
- We had agreed to hold off until "formula" work complete. Joanne will become more involved and resolve issues... more later.
- WWW:** Shari will raise issue at tri-party negotiations. Shari will also meet with Ron and Joanne Thursday morning to plan for immediate issues.
- C. Gifting sick leave
- Is it possible? Ron spoke with Sandy Anderson who does the absence tracking for both full and part-time faculty. Ron feels that the issue is

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, November 17, 2004  
Time: 2-5:00PM  
Place: LR 201

### For the District:

John Bukey  
Ron Martinez\*  
Doug Smith (absent)  
Jeanne Leland

3.0

### For the Union:

Shari Newman\*  
Bernard Acuna  
Gerri Snell  
Jeff Lloyd  
Carolyn Warner

### \*Chief Negotiator

Facilitator: Joanne Bodine  
Guest: Robin Hargrove

### I. Check-In

### II. Rumor Control

Heads up – Process vs. Elephants

- A. Elephant: FUSE rep. was approached by Mgmt. rep. and asked whether she was going to raise the “raises” in her presentation to the Board.
- B. The Jarvis folks (Prop 13) have announced their intention to begin “work” on public retiree fringe benefits to reduce and/or tax among other things. They also want to stop defined benefit plans.

**WWW:** Jeanne, send article John is referring to, to the group, asap.

### III. Off-Agenda

A. Temp Paperwork

- FUSE has been inundated with “temp” paperwork that provides documentation of documentation about documentation.
- New paperwork for all **new** temps (new names only)

**WWW:** Jeanne, research temp processes and report back, for next time

B. Compressed Calendar

- How are employees impacted by 4/10s? Impact on childcare. Compressed calendar may shift the start and end dates of 4/10s. Some staff use their comp time to cover 4/10 schedule to ease impact. What’s the change in Fall schedule PAUSE until after 1<sup>st</sup> of the year.

C. Heads Up

- New law requires 2 hours of sexual harassment training for managers every other year.

### IV. Issues

A. Contract Reprint

- Sections have been delegated to various e-board members for review... more later.

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, December 1, 2004  
Time: 2-5:00PM  
Place: LR 201

30

### For the District:

John Bukey (absent)  
Ron Martinez\*  
Doug Smith (absent)  
Jeanne Leland

### For the Union:

Shari Newman\*  
Bernard Acuna  
Gerri Snell  
Jeff Lloyd  
Carolyn Warner (absent)

\*Chief Negotiator

Facilitator: Joanne Bodine

1. **Check-In**
2. **Rumor Control**  
Bernard heard there is an organizational chart of Plant Ops. and he would like to see it. Ron is not aware of a new chart.
3. **Recollections**  
John will send article to Jeanne who will distribute. Everything else is ok.
4. **Off-Agenda**
  - A. **Grounds SCCP** – FUSE concern re: SCCP for Grounds Dept. with new manager in the making, concern that it will be done before new manager arrives. It was taken to Exec. Committee who recommended that it be referred back to the group to be handled at lower level.
  - B. **Contracting Out From** for busses expires 12/31/04.  
FUSE recommends extension of existing form for six months, through 6/30/05. Heads Up – FUSE currently gathering cost information regarding cheaper to do in-house.  
**Consensus** – Extend form for 6 months
  - C. **AST-Business Services - Karen Bridges' old position** filled by a temp for an extraordinary time frame. Courtney is in Margo's temp position, etc. Many questions regarding reorganization and how these situations occur and when union becomes involved... In this case, all employees will remain classified positions but there are substantive changes in duties, etc. that require union review/oversight, etc. – Article 2 of the CBA will be followed when these situations come up in the future.

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, December 8, 2004  
Time: 2-5:00PM  
Place: LR 201

### For the District:

John Bukey  
Ron Martinez\*  
Doug Smith (absent)  
Jeanne Leland

250

### For the Union:

Shari Newman\*  
Bernard Acuna  
Gerri Snell  
Jeff Lloyd  
Carolyn Warner (absent)

\*Chief Negotiator

Facilitator: Joanne Bodine, (Robin Hargrave brought fabulous homemade treats again!!)

#### 1. Check-In

Carolyn and Doug unable to attend

#### 2. Recollections

OK as revised

#### 3. Rumor

Administrators with Cal Cards are using them for personal purposes

WWW: Jeanne will check with Joyce and report at 12/15 session

#### 4. Heads Up

- A. At Exec. this morning, it was decided to pay Ray Cunningham out-of-class pay as interim Director-Facilities & Operations until the recruitment process is completed. There will be temporary backfill Ray's position for same period.
- B. Need temporary classified clerical support for A.J. through 6/30/04 and needs FUSE approval. Form coming to Shari for FUSE consideration. If still needed after 6/30, it will be made permanent.
- C. Truck: Discussed with Mandy and Henry... one item discussed was possible "van pool" solution. Another is parking truck on campus here. This will be decided in January 2005.
- D. Contract reprint: Almost finished – matching Board Policy numbers still an issue.
- E. Follow up on Contracting Out for Buses – Bernard reported that his department has been working on cost savings analysis. John Volek now has the analysis information.

#### 5. Off Agenda

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, December 15, 2004  
Time: 2-5:00PM  
Place: LR 201

For the District:

John Bukey

Ron Martinez\*

Doug Smith

Jeanne Leland



For the Union:

Shari Newman\*

Bernard Acuna

Gerri Snell

Jeff Lloyd

Carolyn Warner (absent)

\*Chief Negotiator

Facilitator: Joanne Bodine

1. **Check-In**
2. **Heads Up**  
Regarding Board meeting on December 14
3. **Recollections**  
OK as presented
4. **FUSE Location**
5. **Off Agenda**  
Ron made arrangements for FUSE to move to D-16 until current location problems have been resolved.
6. **Truck**  
Meeting with administration, players, including Paul, this morning to discuss issues/problems related to Grass Valley to Rocklin. Phil, Yvonne, and Paul will meet to come up with a viable solution that will be brought back to us as a heads up.
7. **Workers' Comp**  
When Workers' Comp. is used, the employee uses sick leave until they bring a doctor's note and then the sick leave is credited back. Payroll is backed up now, but Tina will collect the process data about "how and when" and give to Jeanne when available. Questions remain regarding District vs. Workers' Comp. about what can be paid.  
**WWW:** More as Tina gets information
8. **Classification**  
Jeanne and Shari are meeting with Sheila tomorrow morning. More later.

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, January 26, 2005 (First meeting of 2005)

Time: 2-5:00PM

Place: Fireside Room

3.0

### For the District:

John Bukey

Ron Martinez\*

Doug Smith

Jeanne Leland

### For the Union:

Shari Newman\*

Bernard Acuna

Gerri Snell

Jeff Lloyd

Carolyn Warner (absent)

\*Chief Negotiator

Facilitator: John Bukey (Neither Joanne nor Robin were able to attend)

Guest: Sheila Forsberg, Johnson & Associates (classification discussion, item 4.)

**Check-In** – First meeting of 2005. We discussed the recent campus events. FUSE office has been relocated to the "Chef's Trailer" HT6A.

**1. Recollections**

Ok as presented

**2. Budget Update**

Doug reported that he attended the recent ACCA budget workshop along with Joyce, Winsome, and Shari. He stated that once the budget "ups and downs" are known, we may need to discuss the outcomes at the table. The Chancellor's Office projects deficit at Sierra of 0%, resulting in \$900K increase in budget for current year. He believes it is "one-time" money. Doug also mentioned the following items: COLA is 3.93%, growth is funded at 3%, retiree benefits will have an estimated \$400,000 impact on Sierra, also unknowns with regard to Prop. 98. Are we a basic aid district? Still unknown. Doug will continue to keep us informed. Also there are facility issues coming our way with our new board. We will be spending "one time" money on the bleachers and the President's contract.

**3. Classification**

Classification consultant Sheila Forsberg provided information regarding services available through Johnson & Associates. We reviewed our "classification journey" with Sheila. She will need to do an assessment of what's been done, salary relationships, the scope of evaluation. She suggested staged agreements, the first being an assessment, then a primary work plan, and regular updates to the table.

WWW: Sheila, provide a work plan/letter, for Feb. 2

**4. Phone Truck**

12/15/04 - Meeting with administration, players, including Paul, this morning to discuss issues/problems related to Grass Valley to Rocklin. Phil, Yvonne, and Paul will meet to come up with a viable solution that will be brought back to us as a heads up.



## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, February 9 2005  
Time: 2-5:00PM  
Place: Fireside Room

For the District:  
John Bukey  
Ron Martinez\*  
Doug Smith  
Jeanne Leland

For the Union:  
Shari Newman\*  
Bernard Acuna  
Gerri Snell  
Jeff Lloyd  
Carolyn Warner (absent)

\*Chief Negotiator  
Facilitator: Joanne Bodine  
Guest: Robin Hargrave

**A. Check-In**  
Group discussed an elephant

**B. Off Agendas**

1. Classified staffing prioritization at Dean's Council (item closed)
2. Bonnie Benson is a consultant coming to help with Foundation (item closed)
3. Sue Drennon wants to come back into the FUSE unit. Management is concerned about salary and that there may be questions. This may be viewed as special consideration.  
**WWW:** Jeanne and Ron will meet with Sue to see if she still wants to move back into FUSE and bring her decision back to the group for further action/discussion, after the Management Retreat
4. Impact on Negotiations if Teamsters Becomes a Part of the Mix (item closed)
5. Grounds Meeting  
Shari reported that she was pleased with staff having a place sound off their concerns. Management (Ron and Doug) response was good. Felt their concerns were heard.  
**WWW:** Ron and Doug, will follow through on plans to remedy the situation
6. Sheila Forsberg of Johnson and Associates sent proposal. It was distributed to the group today  
**WWW:** Group, read and return to the table, next meeting
7. Reorg. vs. Realignment (item closed)
8. 4/10 Schedule 04/05

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, February 16, 2005

Time: 2-5:00PM

Place: Fireside Room

### For the District:

John Bukey

Ron Martinez\*

Doug Smith

Jeanne Leland

### For the Union:

Shari Newman\*

Bernard Acuna

Gerri Snell

Jeff Lloyd

Carolyn Warner

\*Chief Negotiator

Facilitator: Joanne Bodine

Guest: Robin Hargrave

### A. Check-In

### B. Heads Up

1. Jeanne spoke to Sue Drennon and she wants to return to FUSE bargaining ASAP. Jeanne and Shari both received emails from Sue.
2. Mandy was invited in to discuss the 4-10 schedule for 05-06. Ron was to follow-up with Mandy regarding employee groups, and Gail was to discuss with employee groups.

#### Concern: Pre-draft phase

- Fall '05 (by 1 week) – 8/29 compressed schedule
- Spring '06 – the semester will start on 1/26 and go to 5/12. This could be a real pinch.
- 2 back-to-back 6-week summer sessions
- Chemistry has requested 2 back-to-back 7-week sessions  
5/15 Chemistry will start  
5/22 other classes will start
- Faculty (except for Chemistry) wanted a 1-week break
- All summer terms will end on 8/17/06
- Fall semester 2006 begins 8/28/06
- We will be on flex, Los Rios won't – will we have the same start date?

#### Idea:

June 5<sup>th</sup> start 5 8-hour day schedule and run until Aug. 10. TA – this is not hard and fast. This is new and, if adjustments need to be made, we will revisit this.

### 3. Grounds Meeting Update

- Meeting with entire ground crew – everyone spoke up (this meeting was discussed last week)
- Round 2 – meeting was good. Another meeting to be scheduled for dialogue
- Interim staff to be hired to double supervise staff
- 2 things happening:
  1. Going to work on relationship
  2. Take care of man-power
- Ray will serve in current position and deal with 2 projects, building construction and bond stuff – he will not be dealing with crew

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, March 8, 2005

Time: 2-5:00PM

Place: Fireside Room 3,0

### For the District:

John Bukey  
Ron Martinez\*  
Doug Smith  
Jeanne Leland

### For the Union:

Shari Newman\* (absent)  
Bernard Acuna  
Gerri Snell (absent)  
Jeff Lloyd  
Carolyn Warner

\*Chief Negotiator

Facilitator: Joanne Bodine

Guest: Robin Hargrave

### A. Check-In

### B. Heads Up

- 1) Complaint that goes back to 6/22/04, employee's standby status
  - Met this A.M., 3/8/05, decision and was to:
    - a. Pay employee for period of time May 7-9, 2004
    - b. Standby protocol to be revised to address absences. There is a concern of some language that needs to be cleared up regarding illness/vacation-absences and standby assignment – parking lot
    - c. Suggestion: The District will council the Supervisor on the appropriate ways to communicate and manage the employees.
- 2) Sue Drennon being reassigned to FUSE Bargaining Unit?
  - Sue is not doing labor relations issues
  - The move may make Sue vulnerable when reclassification is done
  - Concerns about retirement benefits
  - Maintain current pay – be Y-rated?
  - Does she keep same assignments?
  - Suggested that District meet/talk, think about it – 2<sup>nd</sup> Step to talk to employee, and move forward at that point. Clearly name interests.
  - Union answers question, "Is this the best thing for Sue?" – Yes. Sue isn't happy where she is and she wants out.
  - Key question for District goes back to Sue's classification and how do we determine it?

**WWW:** District will clarify what issues are – and then get back to FUSE. FUSE can retain confidential until retirement.  
Jeanne to move forward with Vance to do a job description/classification and give Sue a heads-up.  
Jeanne to bring report/recommendation from Vance to District/FUSE meeting next week, 3/15/05. Bernard will check with Shari and whoever else to make sure about retirement for Sue – grandfathered back in.
- 3) Calendar 4/10s
  - Sideletter 0405-06: 8/11/05 should be 8/11/06 in second paragraph.
- 4) Truck

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, April 6, 2005

Time: 2-5:00PM

Place: Fireside Room *3.0*

### For the District:

John Bukey (absent)

Ron Martinez\*

Doug Smith

Jeanne Leland (absent)

### For the Union:

Shari Newman\*

Bernard Acuna

Gerri Snell

Jeff Lloyd

Carolyn Warner

\*Chief Negotiator

Facilitator: Joanne Bodine

Guest: Robin Hargrave

### A. Check-In

### B. Agenda Items

- 1) Complaint that goes back to 6/22/04, employee's standby status  
(Item Closed)
  - Met this A.M., 3/8/05, decision and was to:
    - a. Pay employee for period of time May 7-9, 2004
    - b. Standby protocol to be revised to address absences. There is a concern of some language that needs to be cleared up regarding illness/vacation-absences and standby assignment – parking lot
    - c. Suggestion: The District will council the Supervisor on the appropriate ways to communicate and manage the employees.
- 2) Sue Drennon being reassigned to FUSE Bargaining Unit?  
(Jeanne is working directly with Sue. Shari commented that Sue does not expect a full LIUNA pension.)
  - Sue is not doing labor relations issues
  - The move may make Sue vulnerable when reclassification is done
  - Concerns about retirement benefits
  - Maintain current pay – be Y-rated?
  - Does she keep same assignments?
  - Suggested that District meet/talk, think about it – 2<sup>nd</sup> Step to talk to employee, and move forward at that point. Clearly name interests.
  - Union answers question, "Is this the best thing for Sue?" – Yes. Sue isn't happy where she is and she wants out.
  - Key question for District goes back to Sue's classification and how do we determine it?

**WWW:** District will clarify what issues are – and then get back to FUSE. FUSE can retain confidential until retirement. Jeanne to move forward with Vance to do a job description/classification and give Sue a heads-up. Jeanne to bring report/recommendation from Vance to District/FUSE meeting next week, 3/15/05. Bernard will check with Shari and whoever else to make sure about retirement for Sue – grandfathered back in.
- 3) Calendar 4/10s (Closed)

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, May 4, 2005

Time: 2-4:30 PM

Place: Fireside Room 2.5

### For the District:

John Bukey

Ron Martinez\*

Jeanne Leland

### For the Union:

Shari Newman\*

Bernard Acuna

Gerri Snell

Jeff Lloyd

Carolyn Warner

\*Chief Negotiator

Guest: Sheila Forsberg

### 1. Check-In

### 2. PROPOSED AGENDA FOR TODAY, May 11, 2005

Release Time

Workers Comp

Ron – SST-Finance Temps

Standby Review

Review Recollections from 4/13/05 & WWW

### 3. Classification Proposal (Sheila Forsberg) from May 4, 2005 meeting

Today we reviewed at length, the classification proposal from Johnson and Associates. We discussed how the timing of this study (10 months) would reconcile with the current Tripartite Comparability study. One option is to reconcile placement issues with a regular reclassification process.

Career ladders - At this time, we'd rather not go there. We would consider revisiting. Sheila thought there are certain positions that can benefit from a ladder.

Cost – Cost for this classification study would be paid by the District.

Educational requirement – We discussed the pros and cons and should probably revisit this element. There was concern that it would effect internal transfers and/or current employees. Historically, we haven't used it in order to create a more diversified workforce. Sheila thought it is appropriate in certain jobs to have a requirement but not necessary in all. The requirement can help a candidate self place.

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, May 11, 2005  
Time: 2-4:30 PM  
Place: Fireside Room

For the District:  
John Bukey  
Ron Martinez\*  
Jeanne Leland

2.5

For the Union:  
Shari Newman\*  
Bernard Acuna  
Gerri Snell  
Jeff Lloyd  
Carolyn Warner (absent)

\*Chief Negotiator  
Recollections from May 4, 2005 - ok

### 1. GREIVANCES

- A. David Poirier vs. Steve Linthicum
  - Steve Linthicum is a manager who has made verbal and written disparaging remarks about IIT, etc.
  - David believes he has been harassed and wants relief.
  - David believes that his department and all employees have been/are being treated badly by Linthicum.
  - FUSE CBA does not cover faculty issues – outside CBA
  - Option to bring to Dean's attention with VP-EP&S
  - If faculty is doing classified work, can be asked to stop
  - There is question about whether this is grievable.
  - **WWW:** District will waive timelines.
  - **WWW:** Union will refile Poirier vs. Linthicum as a grievance.
- B. Tim Trujillo vs. Scott Decker
  - Tim is a custodian (pool area) and Scott is a water activities coach.
  - Tim believes he has been harassed and wants relief.
  - Decker has been critical of Tim's work and has been seen following Tim around, taking pictures, etc.
  - There is question about whether this is grievable.
  - **WWW:** District will waive timelines.
  - **WWW:** Ron taking Trujillo vs. Decker to Dean of Instruction to try to resolve.
- C. Hostile Work Environment (Grounds)
  - **WWW:** Paused until Ron Miyata is ready to continue.
- D. Jesus Blanco
  - Closed.
- E. Tri-Party Breach
  - "Resolved as of the actions taken on 5/5/05" before formal action taken.
  - **WWW:** Management will draft "something" to resolve grievance and bring to next meeting.

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, May 26, 2005  
Time: 2:00 – 4:00 pm  
Place: Fireside Room

For the District:  
John Bukey  
Ron Martinez\*  
Jeanne Leland

2,0

For the Union:  
Shari Newman\*  
Bernard Acuna  
Gerri Snell  
Jeff Lloyd

Facilitator: Joanne Bodine

\*Chief Negotiator

Recollections from May 18, 2005

1. **CHECK IN**
2. **HEMPHILL SUMMER SCHEDULE:** Bill Hemphill has been asked to work a different schedule install "smart classes" over the summer because the classrooms have to be empty when he doing it. The lack of air conditioning in the classrooms in question over the summer may create an unhealthy working environment. Grounds is the only department given a waiver from the mandatory 4/10 summer work schedule because their work in outside. Shari and Jeanne had discussed this issue earlier. WWW: Ron/Jeanne will bring this matter to the attention of the Executive Committee.
3. **SUE DRENNAN:** WWW: Ron Martinez is meeting with Sue on Friday (6/28) to discuss the outcome of Vance's analysis of her position and will report back at our meeting on June 15<sup>th</sup>.
4. **NEW AA POSITION (FACILITIES & CONSTRUCTION):** The Executive Committee reviewed the College's organization chart and positions campus-wide at their retreat held earlier. Tina L/T will be reporting to the Rocklin campus July 1<sup>st</sup> and will need an Administrative Assistant to support the building effort. The position will report to Tina and will provide support for Tina and Woody. Strategic Council agreed to this position and it will be posted quickly.
5. **FINANCIAL SERVICES POSITION:** There is a position in financial Services that is split between the Rocklin and NCC campus'. FUSE is concerned about where the position is assigned primarily and whether travel time will be counted as time worked and mileage reimbursed. WWW: Ron will research and bring info to May 25 meeting...Continued to June 15<sup>th</sup>.

S CCD  
Collective Bargaining  
FY 2004-2005  
Negotiations Subject Committee  
JLMC  
Schedule 3

DATE	Drennon, Sue	Green, Dolly	Lee, Lawrence	Leland, Jeanne	Lopes, Joyce	Martinez, Ron	McKnight, Diane	Smith, Doug	White, Margaret
8/26/2004		2.00			2.00				
10/25/2004			1.50	1.50	1.50				
11/11/2004			1.50	1.50	1.50			1.50	1.50
12/10/2004	2.50			2.50	2.50				
5/6/2005			1.50	1.50	1.50				
5/27/2005	1.80		1.80	1.80	1.80		1.80	1.80	1.80
<b>TOTALS</b>	<b>4.30</b>	<b>2.00</b>	<b>6.30</b>	<b>8.80</b>	<b>9.30</b>	<b>10.80</b>	<b>1.80</b>	<b>3.30</b>	<b>3.30</b>



**JLMC BENEFITS TASK FORCE**

Recollections

August 26, 2004 - 12:00PM

LRC 313

Zhs

Present: Sonni Cooper, John Lervold, Joyce Lopes, Ron Martinez,  
Dolly Green, Luis Sanchez, Shari Newman and Dennis Lee (Benefits  
Consultant)

Absent: Cliff Burns (Retiree Rep), Bill Cole, Eunis Benecke, Steve Linthicum  
and Lawrence Lee

**2004-2005 Benefit Presentation**

Dennis Lee presented comparison quotes and options from Kaiser and Blue Shield. For the upcoming year, Kaiser's rates went down .03% while Blue Shield's HMO rates increased by 9.03% and their PPO increased 12.6%. It was agreed that the subcommittee would choose 4 different options from those Dennis presented and make a recommendation to JLMC on Thursday, September 16. Dennis will bring a comparison of the quotes and options chosen to JLMC, so that the committee can make a side-by-side evaluation.

1. **Kaiser \$536.33**
  - Increase - \$5 copay for outpatient mental health services
  - Increase - \$5 copay for allergy testing
2. **Blue Shield HMO \$774.13**
  - \$10 copay plan
  - \$250 per hospital admission
  - \$10/20/40 copay for prescription drugs
3. **Blue Shield Active Choice 500 \$711.47**
  - Employee pays first \$500/\$1000 family
  - \$10/20/40 copay
  - \$500 first hospital admission, 80/50% after
4. **Blue Shield PPO \$951.63**
  - \$25 office visits, 80/60%
  - \$100 hospital admission
  - \$5/10/25 copay for prescription drugs
5. **Blue Shield Integrated Medical/Prescription Drug Plan \$669.44**
  - \$35 office visit
  - \$2,250 deductible, 80/20% after
  - no drug card

The subcommittee will report these plans to the JLMC, but will continue to look at other providers, opting out medical and dental, etc., for the 2005-2006 year.

## **JLMC BENEFIT SUBCOMMITTEE**

Recollections

October 25, 2004 – 12-1:30PM

LRC 313

**Present:** Sonni Cooper, John Lervold, Joyce Lopes, Ron Martinez,  
Jeanne Leland, Luis Sanchez, Cliff Burns (Retiree Rep), Eunis  
Benecke, Steve Linthicum, Lawrence Lee, Dennis Lee (Benefits  
Consultant)

**Absent:** Bill Cole, Shari Newman, Dolly Green (who recently resigned from  
Sierra College)

### **Schedule of Future Meetings**

Days and times were discussed as to when it would be the most convenient for committee members to meet. It was agreed that Friday mornings from 9-10:30AM, every other week, would work the best. **The next meeting is scheduled for Friday, November 19 at 9:00AM in the Fireside Room.**

### **JPAs**

The subcommittee will present their benefit proposal to the JLMC next April, 2005, for the upcoming year. One option would be to go to a JPA, but it is necessary to find other JPAs and whether or not they're working for the client. Yuba College has a JPA which is not working for them – they want to go to the Hartford Plan.

Keenan & Associates are a large insurance provider with a substantial client base. For their Flex 125 Plan, they offer a debit card to pay for prescriptions, child care, etc. Joyce will have Keenan & Associates come for the next meeting to discuss options, including JPA, Consumer Choice for part-timers, Flex 125 Plan and self-insurance plans. Recently, Keenan & Associates have formed a dental and vision JPA with Delta Dental and VSP. There are several colleges already signed up, so the administrative costs are shared between them.

Joyce recommended that the committee reviews other benefit contracts to make sure that we are getting the best rate and service. Signa EAP was just reviewed and the recommendation was to keep the current program. Currently, we have Anderson/Bunbury administer our Flex 125 plan. We are paying a lot of money for this service and some companies will do this service for free. In the past, the Business Office reviewed all contracts from providers and got bids.

**WWW: Joyce will have Keenan & Associates present insurance options for November 19 meeting**

**JOINT LABOR MANAGEMENT COMMITTEE  
RECOLLECTIONS**

Date: November 11, 2004  
Time: 3:30-5:00 PM  
Place: L-193

Voting members:

District: Ron Martinez, Doug Smith  
Management: Margaret White  
FUSE: \*Shari Newman, Carolyn Warner  
SCFA: Winsome Jackson, \*Luis Sanchez  
\*also a member of the benefits subcommittee

Retirees: Peter Kolster, Joyce Kelley, Leland Mansuetti, Lynn Young  
Resource: John Bukey (facilitator), Lawrence Lee, Jeanne Leland  
Guests: Ray Giles (CCLC)

- Check-In

GASB 45

Ray Giles of the Community College League presented information regarding the Governmental Accounting Standards Board (GASB) new regulations called GASB 45. GASB will issue new accounting standards for governmental agencies, which includes community college districts, which will impact how districts account for retiree health benefits. The new accounting standards go into effect in 2008 and will require full accrual accounting of retiree health benefits. The Community College League of California (CCLC) has developed a program to meet these new regulations.

Under the proposed program, the participating districts would establish a joint exercise of powers agency (JPA) that would provide the actuarial services required to properly calculate each district's annual OPEB cost and accumulated liability, create a trust arrangement for accumulating benefit funds, and operate a pooled investment program for accumulated benefit funds.

Each participating district will establish (or continue) its own benefits formula and employer contribution rate but would undertake to deposit with the JPA the amount of its annual OPEB cost related to retiree health benefits (less any amounts paid directly for healthcare services or for insurance premiums). Districts would withdraw funds as needed to supplement current budget outlays to pay the costs of retiree health benefits.

It is the intention that Sierra will move forward with this program to meet GASB 45 requirements.

Open Enrollment Update

Ron reported that very few employees enrolled in either of the new Blue Shield plans. Only six enrolled in Active Choice 500 and only two in the PPO Savings Plan.

## **JLMC BENEFIT SUBCOMMITTEE**

Recollections

December 10, 2004 – 12-2:30PM

L -193

Present: Sonni Cooper, John Lervold, Joyce Lopes, Ron Martinez,  
Jeanne Leland, Cliff Burns (Retiree Rep), Eunis Benecke,  
Steve Linthicum, Dennis Lee (Benefits Consultant), Sue Drennon,  
Bill Cole

Absent: Luis Sanchez and Shari Newman

### **Keenan & Associates**

Kathy Reimer from Keenan & Associates spoke about their JPA program and benefits for part-time staff. They recently designed a JPA specifically for community college districts called Community College Insurance Group (CCIG) and it will be in effect 2/1/05. This JPA would offer:

- Delta Dental (4-step plan like we currently have)
- VSP Vision
- Blue Cross/Blue Shield for medical, while still keeping Kaiser as another option

Some positive aspects of this JPA are the broader share of risk by pooling together, lower administration fees, money saved by the carrier, the option to change benefits, online web-based tools, and GasB 45. As of right now, there are three community colleges that are participating in CCIG, College of the Siskiyous, Monterey Peninsula, and City College of San Francisco.

The JPA that Sierra used to have (SIG) was more expensive than the benefits we have now. In the list-serve survey which was done on medical benefits, some JPAs didn't allow for the Hartford Plan for their retirees (this is something which should be looked into).

Keenan's benefit plan for part-time staff (faculty and classified) is also designed for community colleges and offers medical, dental and vision. However, the carrier does not monitor the employee's work status, so that would need to be checked semester by semester. If the District pays into it, the cost would be cheaper.

Sue Drennon reported that only 16 employees switched over to another medical option. Many of them switched to Kaiser.

### **California Valley Trust**

Tierney O'Brien presented information on California Valley Trust (CVA), which is the largest self-insured trust in the state. CVA is formed of 12 members, 6 labor

## JLMC BENEFIT SUBCOMMITTEE

Recollections

May 6, 2005, 2-3:30PM

LR 201

Present: Sonni Cooper, John Lervold, Joyce Lopes, Ron Martinez,  
Jeanne Leland, Steve Linthicum, Dennis Lee (Benefits Consultant),  
Bill Cole, Lawrence Lee

Absent: Luis Sanchez, Cliff Burns, Eunis Benecke, Sue Drennon

### Opting Out Proposal to the JLMC:

*All employees of Sierra Joint Community College District eligible for benefits who provide proof of medical coverage on an annual basis through a spouse or domestic partner may forgo purchasing medical benefits through the Sierra Joint Community College District.*

*Employees must opt out of all medical benefits for which they are eligible. For example, employees must forgo the medical, dental, and vision plan.*

*Eligible employees selecting this option will be refunded a portion of the medical cap. The committee does not recommend refunding the total amount of the cap because it will provide incentive to employees in need of medical coverage to opt out of the coverage.*

*The Subcommittee discussed various refund options including no refund, a flat dollar amount, and is recommending the following as a first step:*

*The refund will be based on the difference between the least expensive medical coverage option (currently Kaiser and Delta Dental Plan A) and the cap. The current monthly cost of Kaiser is \$536.33; the current cost of Delta Dental Plan A is \$75.00, totaling of \$611.33, minus the current monthly cap of \$750.00 equals \$138.67.*

*The committee recommends this option be available on a one-year trial basis in order to evaluate the financial impact on the District and individual participants. In addition, this option should be evaluated annually. This recommendation should only be implemented if financially feasible to the District and the employees covered by medical insurance through the District plan.*

This proposal will go forward to the JLMC on May 27 as the recommendation from the Benefit Subcommittee. Staff must prove that they have dental and medical benefits elsewhere in order to opt out of Sierra College's benefit plans. Data analysis will need to be done to see how much will be reimbursed to

**JOINT LABOR MANAGEMENT COMMITTEE  
RECOLLECTIONS**

Date: May 27, 2005  
Time: 1-2:45 PM  
Place: Fireside Room

Voting members:

District: Ron Martinez, Doug Smith  
Management: Margaret White  
FUSE: \*Shari Newman  
SCFA: Patt McDermid  
\*also a member of the benefits subcommittee

JLMC Benefits Subcommittee: Joyce Lopes (Chair), John Lervold, Sonni Cooper, Eunis Benecke, Steve Linthicum  
Retirees: Peter Kolster, Joyce Kelley, Leland Mansueti, Lynn Young, Cliff Burns  
Resource: John Bukey (facilitator), Dennis Lee, Lawrence Lee, \*Jeanne Leland (recorder), Sue Drennon  
Guests: Diane McKnight, \*John Lervold, Marcy Passuello, Linda Fisher  
• Check-In

GASB 45

Geoff Kischuk, President, Total Compensation Systems and Chuck Thompson, Keenan and Associates, presented an informational session regarding the new Government Accounting Standards Board (GASB) 43 & 45 regulations to measure the retiree medical liability for K-12, Community Colleges, and municipalities statewide. They provided information regarding the process of liability assessment through actuarial study; funding requirements and the possible effects of the decision to fund or not to fund; various funding options such as JPAs, consortiums, bonds, etc.; and Trust funding requirements, needed to meet the implementation deadline.

Benefits Subcommittee - Update

Joyce provided a summary of about 18 months of work the subcommittee had done to review and educate themselves on the variety of approaches to employee benefits. Several approaches were reviewed. A JPA is a "one size fits all" structure that would limit the variety of plans offered nor do they accommodate our current cap or composite rate structure. We are currently self-insured for both vision and dental. Kaiser doesn't allow for self-insurance and the majority of our employees are on Kaiser. The subcommittee recommends staying with the carrier approach again for the new year and to authorize Dennis Lee to gather bids this summer for JLMC review in the fall. - Consensus.

The Subcommittee reviewed an estimated 20 optional medical plans to meet the interest of those employees wishing for a catastrophic plan. Blue Shield included two new plans for employees, a Health Savings Account (HSA) and a catastrophic plan. Only about 20

Sierra CCD  
 Collective Bargaining  
 F/Y 2004-2005  
 Negotiations (Certificated)  
 Schedule 4

DATE	Leland, Jeanne	Martinez, Ron	McKnight Diane	Smith Doug
9/23/2004		2.00	2.00	
10/14/2004	1.50			1.50
11/11/2004	1.30	1.30	1.30	1.30
2/10/2005	2.30	2.30	2.30	2.30
3/3/2005	2.50	2.50		
3/17/2005	2.50	2.50	2.50	2.50
3/31/2005		2.50	2.50	2.50
<b>TOTALS</b>	<b>10.10</b>	<b>13.10</b>	<b>10.60</b>	<b>10.10</b>

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: **September 23, 2004**  
Time: 2:00-4:00 PM  
Location: J7A

**FOR THE DISTRICT**

John Bukey  
Jeanne Leland (absent)  
Ron Martinez\*  
Diane McKnight  
Doug Smith (absent)

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson (facilitator) (absent)  
Jim Forkum  
Luis Sanchez\*  
Jim Weir

\*Chief Negotiator

• **Check-In**

**1. Contract Rewrite (item closed)**

Luis and Winsome are reviewing. They will report back offline. Will print and distribute and send copies to NCC, Truckee, Gateway and the Board. All 3-hole punched, including the bound copies

**2. Service Credit for Part-Time Faculty (pending) (Winsome Jackson) -**

Joyce Lopes met with the group to describe the status of work with PCOE, STRS, and Dept. of Education. A temp has been hired to review status and prepare corrections. Joyce will prepare a communication for affected staff (pending), review with Winsome, jointly sign and send out.

Check on hourly vs. unit pay for part-time faculty. Ron, Wayne, Joyce Lopes, Sandra Anderson, Ninette Dollesen and Payroll staff will meet to discuss. Meeting is scheduled for Wednesday, September 15.

**WHO:** Wayne & Jim  
**WHAT:** CCCCA Conference 10/17  
**WHEN:** Check for vacation

**WHO:** Ron  
**WHAT:** List serve PT/Overload pay by course  
**WHEN:** A.S.A.P.

**3. Request for part-time and full-time faculty names and addresses (in progress) (Jim Weir)**

Jim's request was sent in writing to Payroll. Received 9/4, but need the list of SCFA membership contributors.



**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: October 14, 2004  
Time: 2:00-3:30 PM  
Location: J7A

**FOR THE DISTRICT**

John Bukey (absent)  
Jeanne Leland  
Ron Martinez\* (absent)  
Diane McKnight (absent)  
Doug Smith (fa)

\*Chief Negotiator

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson  
Jim Forkum  
Luis Sanchez\*  
Jim Weir

• **Check-In**

**Closed Session with Board of Trustees**

Doug briefed the group on closed session with the Board. The Board meeting of 11/9 is changed to 11/16. Confidentiality regarding the details of the tentative agreement needs to continue. Units can prepare for ratification the week of 11/1. Payroll is queued up for possible pre-winter break distribution. The tentative tripartite agreement was signed by SCFA today.

WWW: Jeanne, circulate tentative agreement for signatures and distribute copies to signing parties, asap.

Doug reported that he has not yet had an opportunity to meet with the auditors yet for their exit interview but was told the fund balance number is either 9.04 or 9.05. Rather than recalculating the .33, an option would be to add it to each "bucket" as described in the agreement. Doug asks that the methodology be the same for both units.

WWW: Jeanne, contact Shari to discuss, asap

Tripartite meetings will begin again November 3<sup>rd</sup>. We will meet in tripartite format, as previously agreed, every 1<sup>st</sup> and 3<sup>rd</sup> Thursday to work on formula development with Neil Bodine facilitating. Regular SCFA/District meetings will commence again on October 28, October 21 meeting is cancelled.

**Service Credit for Part-Time Faculty (pending)** (Winsome Jackson)

Joyce Lopes met with the group to describe the status of work with PCOE, STRS, and Dept. of Education. A temporary employee has been hired to review status and prepare corrections. Joyce will prepare a communication for affected staff (pending), review with Winsome, jointly sign and send out.

WWW: Jeanne, check on status with Joyce, asap

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: November 11, 2004  
Time: 2:00-3:15 PM  
Location: J7A

**FOR THE DISTRICT**

John Bukey (facilitator)  
Jeanne Leland  
Ron Martinez\*  
Diane McKnight  
Doug Smith

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson  
Jim Forkum  
Luis Sanchez\*  
Jim Weir

\*Chief Negotiator

Guests: Mandy Davies (2:00-2:40 – Compressed Calendar)

- **Check-In**
- **Pick up where we left off on 11/11 – see item #7.**

**1. Board of Trustees – Update**

The District negotiating team will meet in closed session with the Board on 11/16/04 to follow up on the tentative agreement made through tripartite negotiations. The District would like to hold a reception for the Board of Trustees with the tripartite group and Neil Bodine to orient them to the work the group is doing. Also, the District will be meeting in closed session with the Board at the February 8<sup>th</sup> board meeting. Neil will facilitate a discussion to identify interests of the Board.

**2. Service Credit for Part-Time Faculty (pending)** (Winsome Jackson)

Joyce Lopes met with the group to describe the status of work with PCOE, STRS, and Dept. of Education. A temporary employee has been hired to review status and prepare corrections. Joyce will prepare a communication for affected staff (pending), review with Winsome, jointly sign and send out.

Currently there are a handful of part-time faculty identified that must have their STRS retirement recalculated. Joyce is working to identify the scope of the problem. She will prepare a draft communication for review once the scope of the problem is identified and necessary calculations are complete.

**3. Hourly vs. Unit Pay for Part-Time Faculty**

Wayne & Jim asked around at the CCCCA Conference and reported that it's about a 50/50 split how other colleges handle it. Ron concurs. Jim has an idea for a PT/FT faculty salary matrix. Jim will work with Rona and Jeanne for the first look.

Ron is concerned about our current process for part-time faculty statements regarding work assignments and pay and he feels that the current format creates some potential

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: February 10, 2005  
Time: 2:00-4:15 PM  
Location: J7A

**FOR THE DISTRICT**

John Bukey (absent)  
Jeanne Leland  
Ron Martinez\*  
Diane McKnight  
Doug Smith

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson  
Jim Forkum  
Luis Sanchez\* (facilitator)  
Jim Weir

\*Chief Negotiator

Facilitator for 2/24/05 is John Bukey

- **Check-In**

- **Off Agenda Items**

1. **Part-Time Faculty Sick Leave** – (see Agenda Item #5)

2. **Emeritus Issue**

The current contract language article 17 – Teaching after Retirement-Instructional Faculty, describes the status and limitations for retired/Emeritus faculty to teach part-time classes. Emeritus faculty have priority assignment to teach part-time for a period of three years after their retirement. What is their status after three years? This group agreed that after three years Emeritus faculty would have seniority as of the first date of part-time instruction and their seniority status would be governed by the same negotiated structure as all part-time faculty.

WWW: Ron, prepare a draft for Deans' Council, asap

3. **Special Services Coordinator Evaluation Forms** (item closed)

Special Services Faculty Coordinator – Coordinator Input and Summary Evaluation forms were distributed and approved today. These will be added to the Public Folders-Evaluation Forms folder.

4. **Managers and Educational Administrators as Part-Time Instructors** (see Agenda Item #10)

5. **Sideletter 0405-03** (item closed)

This agreement signed today will allow current full-time faculty with only a Bachelors degree to advance on the salary schedule consistent with Track I of the full-time faculty.

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: March 3, 2005  
Time: 2:00-4:30 PM  
Location: J7A

**FOR THE DISTRICT**

John Bukey  
Jeanne Leland  
Ron Martinez\*  
Diane McKnight (absent)  
Doug Smith (absent)

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee (facilitator)  
Winsome Jackson  
Jim Forkum  
Patt McDermid  
Luis Sanchez\*  
Jim Weir (absent)

\*Chief Negotiator

Guests: Suzanne Davenport, Brian Haley, Lynn Medeiros, Michelle Kalina (Distance Learning item)

• **Check-In**

• **Off Agenda Items – None**

1. **Board of Trustees – Update**

Ron, Doug, and John are scheduled for closed session with the Board on 3/8/05.

2. **Service Credit for Part-Time Faculty (pending)**

Currently there are a handful of part-time faculty identified that must have their STRS retirement recalculated. Joyce is working to identify the scope of the problem. She will prepare a draft communication for review once the scope of the problem is identified and necessary calculations are complete. Winsome reported that she talked with Joyce. The business office has a part-time person working on this issue. She will have a report within a week.

**WWW:** Joyce will prepare a communication for affected staff (pending), review with Winsome, jointly sign and send out.

3. **Hourly vs. Unit Pay for Part-Time Faculty – (Moved to parking lot)**

4. **Distance Learning**

Distance Learning committee discussed with the DL program and evaluation process. The DL Committee's priority is to get evaluations up to date. Most faculty are doing well online. There are a few who range from not responding promptly to not responding at all, to student emails. Currently there are 80-85 DL instructors. Annual review is difficult but a regular schedule should be achieved within an estimated four semesters (handout). The group told Suzanne she could augment the DL Committee to handle evaluations. Contract language (19.16, line

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: March 17, 2005  
Time: 2:00-4:30 PM  
Location: J7A

**FOR THE DISTRICT**

John Bukey (facilitator)  
Jeanne Leland  
Ron Martinez\*  
Diane McKnight  
Doug Smith

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson  
Jim Forkum  
Patt McDermid  
Luis Sanchez\*  
Jim Weir

\*Chief Negotiator

Guest: Joyce Lopes for Paycheck discussion

- **Check-In**

- **Off Agenda Items**

- a) **Faculty to Interim Management**

History faculty member Deb Sutphen is currently in an interim management position with the District. Is she a union member or not? Winsome reported that she checked with CTA and Deb is able to continue her payments to the CCA & CTA progressive vesting insurance policy available through her SCFA membership. Deb, however, cannot be part of the union while in the management position. It would create a conflict of interest to have a management employee voting on SCFA issues.

- b) **Board of Trustees Meeting on 4/12**

Ron provided a heads up regarding a change to initial plans to have the Board meet with the Tripartite group in a show tell and reception format due to time and logistical constraints. Morgan is suggesting we meet with the Board in open session. Triparty would be the first item. Neal would lead a discussion. We would have punch and cookies in the hallway. The Board would then go into closed session. Neal would gather interests of the Board.  
WWW: Ron, will discuss with FUSE, ASAP

- c) **STRS Workshop**

Ron attended a recent STRS workshop here on campus. He provided several STRS booklets along with a business card from Karen Barry who works at PCOE. Karen is very knowledgeable and provides individual appointments. Ron encouraged SCFA to include this information in their faculty newsletter.

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

Date: March 31, 2005  
Time: 2:00-4:30 PM  
Location: J7A

**FOR THE DISTRICT**

John Bukey (absent)  
Jeanne Leland (absent)  
Ron Martinez\*  
Diane McKnight  
Doug Smith

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson  
Jim Forkum (facilitator)  
Patt McDermid  
Luis Sanchez\*  
Jim Weir

\*Chief Negotiator

• **Check-In**

• **Off-Agenda Items**

1. **Maile Barron – Sideletter**
2. **Emeritus – Sideletter**
3. **PT Health Care – Report**
4. **WWW: Ron needs to finalize the language for PT leave banking - next meeting.**
5. **Skipped Agenda to Item #10 – Doctoral Stipend**
  - SCFA has an interest that a separate column be created for both FT/PT salary schedules. Discussion.
  - SCFA emphasized that SCFA position is that they feel they have an understanding regarding 03-04 application of the 900K proportionate distribution based upon the ability to request a second 03-04 final audit.
  - District expressed desire to meet the interests in the formal Board/District processes. Furthermore, the SCFA would like to receive a clear message that this is understood.

**Consensus:** Agreed that a doctoral column be established for both FT and PT faculty. The percentage applied, \$ amount, etc., will be addressed in future discussions.

**WWW: Jim, Jeanne, appropriate Payroll Rep. to set up tables, options, impact at 1%.**

6. **Department Chair Article**
  - Diane McKnight, Jim Forkum, Winsome Jackson continue to work on the creating and review of documentation.
7. **Board Meeting on April 12**
  - Email the Tri-party agenda by 4/1

CCD  
 Coll. Bargaining  
 FY 2004-2005  
 Dean Council Meetings  
 Schedule 5

DATE	Albee, Neal	Bridges, Karen	Davies, Mandy	Decourten, Frank	Dollensin, Ninette	Epling-Davis, Carla	Guevara, Stephanie	Haley, Brian	Jackson, Darlene	Kalina, Michelle	Kleinbach, Mary
8/12/2004	0.40		0.40	0.40			0.40	0.40	0.40		0.40
8/26/2004						0.80		0.80	0.80	0.80	0.80
9/2/2004	0.80			0.80			0.80	0.80			
9/16/2004	0.70			0.70			0.70	0.70	0.70		
9/23/2004				0.70			0.70	0.70	0.70		
12/9/2004			0.50		0.50		0.50			0.50	0.50
1/27/2005	0.20			0.20			0.20	0.20	0.20		
2/3/2005	0.30	0.30		0.30			0.30	0.30			0.30
3/17/2005	0.80			0.80					0.80		0.80
4/7/2005	0.50		0.50		0.50		0.50	0.50	0.50		0.50
5/19/2005	1.10		1.10	1.10			1.10	1.10			1.10
<b>TOTALS</b>	<b>4.80</b>	<b>0.30</b>	<b>2.50</b>	<b>6.00</b>	<b>1.00</b>	<b>0.80</b>	<b>5.20</b>	<b>5.50</b>	<b>4.10</b>	<b>1.30</b>	<b>5.90</b>

DATE	Leland, Jeanne	Lopes, Joyce	Martinez, Ron	McKnight, Diane	Morgan, Lynn	Junnally, Delect	Scott, Sandra	Taylor, Tina	Thiers, Laurie	Tsuji, Bill	Volek, John	White, Margaret
8/12/2004		0.40		0.40			0.40			0.40	0.40	0.40
8/26/2004			0.80			0.80					0.80	0.80
9/2/2004			0.80	0.80	0.80		0.80			0.80	0.80	
9/16/2004			0.70	0.70	0.70	0.70				0.70	0.70	0.70
9/23/2004			0.70	0.70	0.70		0.70			0.70	0.70	0.70
12/9/2004			0.50	0.50	0.50	0.50		0.50	0.50	0.50	0.50	0.50
1/27/2005			0.20	0.20			0.20			0.20	0.20	0.20
2/3/2005	0.30		0.30		0.30	0.30	0.30	0.30		0.30	0.30	0.30
3/17/2005			0.80	0.80		0.80				0.80	0.80	0.80
4/7/2005				0.50		0.50		0.50	0.50	0.50	0.50	
5/19/2005			1.10	1.10		1.10		1.10		1.10	1.10	
<b>TOTALS</b>	<b>0.30</b>	<b>0.40</b>	<b>5.90</b>	<b>5.70</b>	<b>3.40</b>	<b>4.70</b>	<b>2.90</b>	<b>1.30</b>	<b>1.00</b>	<b>6.00</b>	<b>6.00</b>	<b>4.40</b>



Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

DATE AUGUST 12, 2004 (14)

<del>Morgan [unclear]</del>	
<del>[unclear]</del>	Margaret White
Maggie Nica	↓
John F. Volek	
Bill M. Tsuji	Bill Tsuji
Mandy Davis	Mandy Davies
Sandra Scott	Sandra Scott
Neal Allbee	Neal Allbee
Barlene Jackson	Barlene Jackson
Stephanie Cuervara	Stephanie Cuervara
Brian Haley	Brian Haley
Frank DeBart	Frank DeBart
Karen Watters Dunlop	Karen Dunlop
Diane McKnight	Diane McKnight
Joyce Lopes	Joyce Lopes
Mary Kleinbach	Mary Kleinbach

Individual Activities Time Log for Mandated Costs of  
**961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
8/12/04	Deans' Council Meeting And	SCFA	15 min		
1 / 1	Discussions of Negotiation	FUSE	5 min		
1 / 1	MEETINGS				
1 / 1					
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**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature Mary Klembach

Date 8-13-04

If you have any questions, please contact Mary at 916.781-0543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

DATE AUGUST 26, 2004 (8)

*MM*

Ron Martinez

? *Michelle Neval*

*Michelle Kalina*

*Barbara Jackson*

*Margaret Heise*

*Brian Hatley*

*John F. Voelk*

? *Michelle Galt*

*Deleena Mually*

Deleena Mually

? *Linda Banta*

*Kan Watts Dm lyp*

*Mary Klemsch*

Individual Activities Time Log for Mandated Costs of  
**961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs.

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
8/26/04	Deans' Council Meeting And	SCFA	45min		
1 1	Discussions of Negotiation	FUSE	-0-		
1 1	MEETINGS				
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Employee Signature Mary Klewisch Date 8-27-04

If you have any questions, please contact Mary at 916-781-0543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

DATE SEPTEMBER 2, 2004 (P)

Morgan Lynn

Neal Albee

Jane McLaughlin

Frank DeCoster

John J. O'Neil

Brian Halley

Sandra Scott

Rhonda Guerra

John F. Jolich

Bill M. Tsuji

M. M. [Signature]

Mary Kewerdi

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs.

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
9/21/04	Deans' Council Meeting And	SCFA	45 min		
1/1	Discussions of Negotiation	Fuse	0		
1/1	MEETINGS				
1/1					
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Employee Signature Mary Kleinbach Date 9-3-04

If you have any questions, please contact Mary at 916.781.0543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

DATE SEPTEMBER 16, 2004 (2)

Morgan Lynn

John F. Volok

Frank DeCristo

Karen Walters Dunlap

B. Hately

S. Gervais

Dorene Spiller

Delecia Munnally

Linda Banta

Margaret Spivey

Cliff G. G.

Bill M. Grijp

M. G.

Neal Allbee

Jane McNight

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (see attached)

Exact Position Title

Ed. Programs = SVCS

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
9/16/04	Deans' Council Meeting And	SCFA	25 min		
1/1	Discussions of Negotiation	FUSE	15 min		
1/1	MEETINGS				
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Employee Signature Mary Klenzsch Date 9-16-04

If you have any questions, please contact Mary at 781-0543.

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_



Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

DATE SEPTEMBER 23, 2004

(?)

Morgan Lynn

Andrea Scott

Bill M. Tsuji

Diane Melnyk

Z. Haley

J. Guesman

Shelene Jackson

Maggie White

Linda Banta

Karen Watters Dunlap

Frank DeCoster

John F. Vollet

May Kleinich

M. M. M.

**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: SIERRA COLLEGE Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached) \_\_\_\_\_ Exact Position Title \_\_\_\_\_  
Ed. Programs & Svcs. 916 781-0543 12mo/11mo/10mo/hrly  
 Dept. & Location # \_\_\_\_\_ Telephone # \_\_\_\_\_ Work year length \_\_\_\_\_

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
9/23/04	Deans' Council Meeting And	SCFA	30 min		
1 / 1	Discussions of Negotiation	FUSE	10 min		
1 / 1	MEETINGS				
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Employee Signature Mary Klenzsch Date 9-24-04  
 If you have any questions, please contact Mary at 916-781-0543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

DATE DECEMBER 9, 2004

(5)

Morgan Ryan	Frank DeCoster
? Kim Ondatsky Giffin	Laurie Thurn
Maggie Lee	Mary Kewbach
Bill M. Szabo	
Yvonne Johnson	
Diane McInright	
Michelle Kelna	
Debra Munnally	
Kevin Brady	
Brian Harty	
John F. Volch	
<del>Mr. Munnally</del>	
? Haglone Freberg	
Nancy Davis	
Karen Walters Dunlop	
Suzanne Green	

Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs & Svcs

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
12/9/04	Deans' Council Meeting And	SCFA	15m		
1/1	Discussions of Negotiation	FUSE	15m		
1/1	MEETINGS				
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Employee Signature Mary Kleinbach <sup>List. of Signatures</sup> Date 12-9-04

If you have any questions, please contact Mary at 916 781-0543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

DATE JANUARY 27, 2005 (2)

Diane Melnyk

Sandra Banta

Karen Watter Dunlop

Frank DeCusca

Kimberly Haepfer

Maggie Price

Brian Haley

John F. Webb

Tom M. M. M.

Ned Albee

Erinne Quince

Suzanne G. G.

Sandra Scott

Sue Michaels

Bill M. Tsuji

Individual Activities Time Log for Mandated Costs of  
**961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs = Svcs

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
1/27/05	Deans' Council Meeting And	SCFA	5 min		
1 / 1	Discussions of Negotiation	FUSE	5 min		
1 / 1	MEETINGS				
1 / 1					
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Employee Signature Mary Klembat

Date 1-27-05

If you have any questions, please contact Above at 916) 781-0543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_.

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

DATE FEB. 3, 2005

(3)

Morgan Ryan

Jeanne Heland

Bill M. Torzji

June Dudzinski - Paper

? Debra Japhen

Stephen Guerin

Audrea Scott

Erin Haley

Neal Albee

Debra Munnally

Mike Munnally

? A. J.

Margie Nino

Lynnda Banta

Frank DeCourten

Kwin Bray

Mary Klousch

Haren Bridges

Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: SIERRA COLLEGE Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached) \_\_\_\_\_ Exact Position Title \_\_\_\_\_

Ed. Programs & Svcs \_\_\_\_\_ 916 781-0543 \_\_\_\_\_ 12mo/11mo/10mo/hrly

Dept. & Location # \_\_\_\_\_ Telephone # \_\_\_\_\_ Work year length \_\_\_\_\_

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
2/3/05	Deans' Council Meeting And	SCFA	0		
1/1	Discussions of Negotiation	FUSE	15 min		
1/1	MEETINGS				
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Employee Signature Mary Kleuszich Date 2-3-05

If you have any questions, please contact Abale at 781-0543 (916)

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_



Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

DATE March 17, 2005 (8)

~~Frank DeGroot~~

Ken Brey

Karen Walters Dantay

Maggi Thrice

Patricia Hallberg

~~M. [unclear]~~

JACKIE SKLAROW FOR S. GUEVARRA

John F. Volek John F. Volek

Delecia Munnally

Neal Allbee

Audene Jackson

Jeanne Melanight

Debra Sudler

Tom M. Young

Marg Klumbach

Individual Activities Time Log for Mandated Costs of  
**961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs = SWS

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
3/17/05	Deans' Council Meeting And	SCFA	30M		
1/1	Discussions of Negotiation	FUSE	15M		
1/1	MEETINGS				
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Employee Signature Mary Kleinbach + SEE Attached Signatures Date 3-17-05

If you have any questions, please contact Mary @ 916 781-0543 at \_\_\_\_\_

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

DATE APRIL 7, 2005

(5)

Mark DeLuca

Mandy Davis

Ninette Dollesin

Bill Farni

Deb Stephen

Diane McLunghat

Neal Albee

Madene Jackson

J. Indratsky-Rajon

Bill Haley

Laurel Thiers

Kim Bray

Stephanie Sullivan

Sandra Skelt

Delecia Munnally

Marg Kennerch

Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members  
Employee Name (See attached) \_\_\_\_\_ Exact Position Title \_\_\_\_\_  
Ed. Programs: SWS \_\_\_\_\_ 916 781-0543 \_\_\_\_\_ 12mo/11mo/10mo/hrly  
Dept. & Location # \_\_\_\_\_ Telephone # \_\_\_\_\_ Work year length \_\_\_\_\_

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
4/7/05	Deans' Council Meeting And	SCFA	25 min		
1/1	Discussions of Negotiation	FUSE	—		
1/1	MEETINGS				
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Employee Signature Mary Kleinsch + see attached signatures Date 4-7-05

If you have any questions, please contact Mary at 916 781-0543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Verifying Signatures  
For Deans' Council Activities  
Time Log for Mandated Costs of  
961/75 COLLECTIVE BARGAINING

DATE May 19, 2005 (1.1)

Frank Crute

Mandy Davies

Diane Melnyk

Phil M. Tsuji

Deb Sullivan

B. Haley

J. Guerin

Aileen Munnally

Linda Banta

Karen Waters Dunlop

Bill Metz

Kwinn Bray

May Klempich

Paul Allene

John F. Volek

4  
NW

Individual Activities Time Log for Mandated Costs of  
**961/75 Collective Bargaining**

District: SIERRA COLLEGE

Fiscal Year: 2002-2003

Deans' Council Members

Employee Name (See attached)

Exact Position Title

Ed. Programs = SVCS

916 781-0543

12mo/11mo/10mo/hrly

Dept. & Location #

Telephone #

Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
5/19/05	Deans' Council Meeting And	SCFA	30 min		
1/1	Discussions of Negotiation	FUSE	25 min		
1/1	MEETINGS	ILMC	10 min		
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EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature Mary Kleinbach + SEE Attached Signatures Date 5-19-05

If you have any questions, please contact Mary at 916 781-0543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

Si CCD  
 Collective Bargaining  
 FY/ 2004-2005  
 Negotiations Tri-Party (Classified)  
 Schedule 6

DATE	Davies, Mandy	Haley, Brian	Leland, Jeanne	Martinez, Ron	McKnight, Diane	Scott, Sandra	Smith, Doug	Lopes, Joyce
11/4/2004			3.00	3.00	3.00		3.00	
2/3/2005			3.00	3.00			3.00	
3/10/2005			3.00		3.00		3.00	
5/5/2005	3.00		3.00	3.00	3.00			3.00
5/19/2005			3.00	3.00	3.00			
6/2/2005			4.00					
6/16/2005			4.00	4.00	4.00			4.00
6/30/2005		4.00		4.00		4.00		4.00
<b>TOTALS</b>	<b>3.00</b>	<b>4.00</b>	<b>23.00</b>	<b>20.00</b>	<b>16.00</b>	<b>4.00</b>	<b>9.00</b>	<b>11.00</b>

## Tripartite Negotiations

November 4, 2004

Com. Ed A-16, 2:00-5:00

Neil Bodine, facilitator

Classified: John Lervold, Carolyn Warner, Gerri Snell, Shari Newman,  
Bernard Acuna, Jeff Lloyd,  
District: Doug Smith, Ron Martinez, Diane McKnight, John Bukey,  
Jeanne Leland,  
Faculty: Wayne Barbee Winsome Jackson, Richard Alman Jim Weir,  
Jim Forkum

1. Check in, Agenda, Minutes
2. Process check – schedule
3. Share data and discuss
4. Continue formula buildup
  - % split between P & NP
  - Growth allocations
  - Post P/NP split
5. Next steps, next meeting, meeting evaluation

\*\*\*\*\*

### II.

- A. Process
  - Implications of change in Trustees:
    - Continue negotiations as scheduled
    - Management Team meets with reconstituted Board of Trustees to check on interests and report back to group
- B. Data
  - See John's handout
  - %'s were relatively stable, with a little creep on the P side
    - 77.3% in 00-01
    - 80.2% in 03-04
  - Analysis based on total, not new revenue
  - Formula based on total revenue is feasible, but substantial consequences → have to define very carefully
  - Frey's #'s are comparable if add classified to faculty
  - Unrestricted GF
    - % benefits are growing, especially for classified
  - 3%-4% of unrestricted GF personnel costs go to students, retirees and others
    - How account in formula?
  - GF projections worksheet (draft)
    - based on '03-'04 %'s



**Tripartite Negotiations  
Formula Negotiations  
February 3, 2005**

Com. Ed A-16, 2:00-5:00PM

Neil Bodine, facilitator

Classified: John Lervold, Gerri Snell, Shari Newman, Bernard Acuna,  
Jeff Lloyd, Carolyn Warner (absent)  
District: Doug Smith, Ron Martinez, Diane McKnight (absent), John Bukey,  
Jeanne Leland  
Faculty: Wayne Barbee Winsome Jackson, Richard Alman Jim Weir,  
Jim Forkum, Luis Sanchez  
Guest: Steve Shapiro (visiting facilitator-in-training)

1. Check in, Agenda, Minutes, Process Check
2. Straw Design
3. Comparability Study
4. Next Steps, Schedule Next Agenda, Meeting Evaluation

\*\*\*\*\*

A. **Global Situation**

1. Bargaining units – if Administrators bargaining unit formed, may want to join these discussions
2. Have not discussed the bargaining process with the Board yet  
Three issues:
  - Will the Board support the collaborative process?
  - Will they support a formula?
  - Will their interests shift as a result of the shift in membership?
3. - The Board wants to see the comparability study  
- The Board seems to be supportive of collaboration  
- The wild card is the possible formation of new bargaining unit or units

B. **Comparability Study**

- Questions were drafted by School Services
- The questions have not been reviewed by the subcommittee – copies were circulated
- No contract has been signed by any consultant
- Send back to subcommittee to:
  1. Recommend a consultant
  2. Develop a set of questions
  3. Determine the criteria for the study

**Tripartite Negotiations  
Formula Negotiations  
March 10, 2005  
Com. Ed A-16, 2:00-5:00PM  
Neil Bodine, facilitator**

Classified: Jeff Lloyd, Carolyn Warner, John Lervold  
Absent: Gerri Snell, Shari Newman, Bernard Acuna,  
District: Doug Smith, Diane McKnight, John Bukey, Jeanne Leland  
Absent: Ron Martinez  
Faculty: Wayne Barbee Winsome Jackson, Richard Alman, Jim Weir, Luis  
Sanchez, Patt McDermid  
Absent: Jim Forkum

1. Check in, Agenda, Minutes, Process Check
2. Straw Design On Formula
3. Comparability Study
4. Next Steps, Schedule Next Agenda, Meeting Evaluation

\*\*\*\*\*

A. **Process Check**

1. \$900K & Board
  - Management met with Board
  - Board is interested in meeting with Committee
  - Expect to meet with Neil regarding interests
  - Explained the background on the \$900K and all perspectives
  - Interested in negotiating to settle issue – not ready to give direction
  - Very interested in comparability study – ASAP
  - Want results at same time
  - Interested in external and internal equity
  - Board was open and interested – good dialogue – seemed transparent

→ Doug and John will further report on this issue at next meeting

B. **Formula Straw Design**

- John Lervold handed out →
1. Notes about Los Rios Model
  2. Quick Reference on Interests
  3. The Los Rios Processes
  4. New Formula Objectives
    1. **Comments about the Los Rios Model (see notes)**
      - Restricts bargaining units' ability to decide annually how to use \$\$ in its bucket

**Tripartite Negotiations**  
**May 5, 2005**  
Com. Ed A-16, 2:00-5:00PM  
Neil Bodine, facilitator

Classified: Jeff Lloyd, John Lervold, Gerri Snell, Shari Newman, Bernard Acuna, Carolyn Warner  
District: Diane McKnight, Ron Martinez, Jeanne Leland, John Bukey, Joyce Lopes  
Faculty: Wayne Barbee, Winsome Jackson, Richard Alman, Jim Weir, Luis Sanchez, Patt McDermid  
Guest: Mandy Davies

**Agenda**

1. Check In, Minutes, Agenda, Process Check
2. "450" Presentation
3. Formula
4. \$900K
5. Ground Rules (review)
6. Next Steps, Next Agenda, Meeting Evaluation

\*\*\*\*\*

**A. "450" Problem (Mandy Davies)**

1. Knew about problem at open labs
2. Open labs → 450s
  - Setup as legitimate courses – all approved by curriculum – since 1999 – very successful
3. Chancellor's Office never gave guidance about labs – even though asked
4. Last Fall, the Chancellor's Office inquired about the program
5. Told to keep as 450 for '04-'05, but convert to non-credit in '05-'06
  - Would reduce funding, but not eliminate
6. When submitted apportionment report in January, was #s for Fall and best projection for Spring, also 450 earnings for '04-'05 based on '03-'04 income
7. After the P1 report, enrollment started to decline – approximately 2% compared to expected 4%
8. When took budget based on 2 ½ to Board, show loss for year; Board unacceptable
9. Meanwhile Chancellor's Office created new guidelines on open labs, which required students to register or now enroll
10. Also asked to audit non-credit classes – listed 801 classes but not 450s
11. Changed on system to have computer logon show enrolled
12. Started to do 2<sup>nd</sup> apportionment report – strange results



## **Tripartite Negotiations**

**June 2, 2005**

Com. Ed A-16, 1:00 AM -5:00 PM

Classified: John Lervold, Shari Newman, Bernard Acuna, Sue Keller  
District: John Bukey, Joyce Lopes, Jeanne Leland  
Faculty: Wayne Barbee, Richard Alman, Jim Weir, Patt McDermid

Today, Neil Bodine, our facilitator was absent. The group agreed to continue to work on the formula.

Recollections – Attendance reporting for the last two meetings needed corrections. Otherwise, approved with revisions.

John Lervold provided the group with an updated formula straw design draft dated 6/2/05.

John guided the group through the revisions from yesterday's meeting. We began with

2.3 - "Attrition savings" and decided "attrition adjustment" would be a better term.

2.3.1 – Reduction if force should add "other than for a fiscal emergency and/or severe fiscal condition"

2.26 – Reorganization/realignment – WWW: Jeanne, research terminology, asap

We began to get involved in editing the for clarity as we discussed each revision and recording each edit became problematic.

P.23 - % for equity adjustments to be determined

P.26 – Mutual Interest – this item needs further discussion. The group though that for situations where the formula cannot address, we would reconvene and discuss.

7.1.2 - PERS/STRS – This section needs shows it as a "mutual interest item," however, the recent conceptual agreement was anything extraordinary and disproportionate would come after the big split.

Section 8 – Growth. What happens if we have no growth "the ungrowth"  
Also Independent Service Agreements (ISA) need to be removed because the District does not pay faculty put pays the contract.

Section 10 – Emergency Budget/Fiscal Actions

The group attempted to define a fiscal emergency vs fiscal crisis – a condition "red" and a condition "yellow". Is it something the Board declares, that would be a fiscal crisis. Is it being placed on the Chancellor's "watch list" with reserves at 5%? SCFA & FUSE were concerned about steps to be taken first in a fiscal situation that would result in job loss. The FUSE collective bargaining agreement

## Tripartite Negotiations

June 16, 2005

B-6

1:00 AM -5:00 PM

Classified: John Lervold, Shari Newman, Bernard Acuna, Sue Keller, Jeff Lloyd, Gerri Snell  
District: John Bukey, Ron Martinez, Jeanne Leland, Diane McKnight  
Faculty: Wayne Barbee, Richard Alman, Jim Weir, Patt McDermid, Jim Forkum, Winsome Jackson, Luis Sanchez, Jim Weir  
Facilitator: Neil Bodine

### AGENDA

1. Check in, agenda/minutes, process check (Management Union & Trustee Retreat)
2. Comparability Study
3. Continue formula discussion
4. Usual close

#### **A. Process Check/Reports**

##### 1. Admin. Units

- 2 groups – Classified Supervisory & Educational Administrators
- Started negotiations
- Reps for Educational Administrators are Brian Haley and Sandra Scott
- Reps for Classified Supervisory are Lonnie Schwenk and Greg Schneider
- Interested to attend the 6/30 meeting to see the progress – participants preferably, if not observers
- Group agrees that observation is good – but reluctant to include as participants because no contract with administrative unit and so close to the end
- Do not want to spend time bringing them up to speed in the meetings

##### 2. Trustee Retreat

- Held a retreat on Trustees' goal for the next year
- Asked them to give clear directions about the Board's interests regarding Tripartite Negotiations on compensation and formula
- Added interests:
  - Financial stability
    - Find reserve of 8-12%
    - Balanced budget
  - Develop a transition plan resulting in a formula based on compensation – agreed that is fiscally sound and sustainable over time

## Tripartite Negotiations

June 30, 2005

A-16

8:00AM-12:00PM

Classified: John Lervold, Shari Newman, Bernard Acuna, Sue Keller,  
Jeff Lloyd, Gerri Snell  
District: John Bukey, Ron Martinez, Joyce Lopes, Jeanne Leland,  
Diane McKnight  
Faculty: Jim Weir, Patt McDermid, Jim Forkum  
Management: Brian Haley, Sandra Scott, Greg Schneider  
Facilitator: Neil Bodine

### AGENDA

1. Check in, Elephant Discussion, Comparability Study Update, Continue Formula Discussion
2. New or Total Revenues?
  - Joyce agreed to continue to share financial information on personnel/non-personnel costs: Reports, audited financials and 311 Report
  - P/NP is % based on expenditures, not revenues
3. This information would be shared with this group as part of the formula.
4. Joyce will draft language.
5. Proposal: Adopt language of #11 along with Joyce's audited financial information (6/23/05 – outstanding formula issues reviewed).
6. Joyce will work with this group to explain financial information throughout the year.
  - John handed out a formula simulation
  - Will need to do the income calculations twice a year
    - July: The initial calculations based
    - February: "Tune up" the figures based on later data
    - If Basic Aid beyond ERAF, then would true up October of the following year.
  - Joyce would like to develop a format to show the calculations and the sources

Question: How calculate the split between bargaining unit buckets?

Options:

1. 3-year rolling average ← Use in simulation
2. Adjust once every 3 years
3. Do annually based on the year
4. #3, but no change if insignificant
5. #1, but review to deal with large changes and inappropriate impact

**AGREE:** Go with the proposed concept in #11 – i.e., new revenue instead of total, with addendums agreed to earlier.

**MANDATED COST TRACKING FORM**  
 Complete a separate form for each activity

Date: 11-17-04	Time: 12:00 - 2:00 (nearest 1/4 hour) (2 hrs)
Parties Present:	
<del>ASINGAU</del> <del>RON</del> Winsome Jackson - union Luis Sanchez - union	
Grievant's Name:	
Faculty Negotiation Items	
Description (include section of contract being discussed):	
Discussing Administrators Teaching.	
Unions (circle one):	
<input checked="" type="radio"/> SCFA <input type="radio"/> FUSE	
Code	Description
AA	Initial Contract Distr.
AG	Final Contract Distr.
AI	Public Hearings
AP	Negotiating
AT	District's Proposal
BU	Union's Proposal
ER	Electing Exclusive Rep      DA
IF	Fact Finding                      UD
IM	Mediation                        OO
	Other (please describe above)
Please enter tracking information ASAP and forward to Judy McClymonds	

NP  
 Enter individually



MANDATED COST TRACKING FORM

Date: 4-13-05 Time: 1/2 hour  
(nearest 1/4 hour)

Parties Present:  
Mandy Davies

Grievant's Name:

Description (include section of contract being discussed):  
Discussions on Compressed  
Calendar Hours & Load

Please sign (if not signed, form invalid):  
*[Signature]*

Unions (circle one):  
SCFA FUSE

Activity Codes (circle one):

Code	Description	Code	Description
AA	Arbitration Appeals	ND	Initial Contract Distr.
AG	Grievances	NF	Final Contract Distr.
AI	Contract Interpretation	NH	Public Hearings
AP	PERB Grievance Hearing	NN	Negotiating
AT	Contract Training Session	NP	District's Proposal
BU	Determining Bargain Unit	NR	Union's Proposal
ER	Electing Exclusive Rep	UA	Unfair Labor Appeals
IF	Fact Finding	UD	Unfair Labor Disputes
IM	Mediation	OO	Other (please describe above)

Please enter information, sign this form, and forward to Judy McClymonds.

**Tri-Party Meeting**  
**Thursday, September 16, 2004**  
**L-193**  
**2:00-3:00 PM**

**FUSE:** Bernard Acuna, Jeff Lloyd, Shari Newman, Carolyn Warner, Gerri Snell, John Lervold

**SCFA:** Winsome Jackson, Jim Weir, Luis Sanchez, Richard Alman, Wayne Barbee, Jim Forkum

**District:** Ron Martinez, Doug Smith, Diane McKnight, John Bukey, Jeanne Leland

The group met briefly to discuss plans toward an interim compensation agreement for 2004-2005. Luis proposed using SCFA regular meeting times and FUSE agreed that that schedule would work for FUSE.

**WWW:** Jeanne, find out what Neil's calendar looks like for Thursdays and email the group. Also find a location for future meetings.

To begin the discussion Luis requested information regarding the fund balance for 2003-2004. Doug provided a "white board" status report. His information included a discussion of the compensation agreement regarding the fund balance. The group asked when Doug would know final audit figures. Doug thought he would have a good idea at the auditor exit interview currently scheduled for December 10, 2004. Doug also went over the 2003-2004 deficit which is currently at 2% but may yield something less. He stated that the change is usually posted to the following year, in this case 2004-2005.

The following consensus proposal was offered:

To wait for the audited number and each group would select whether they wanted on or off-schedule payments. Doug would keep us informed of any significant pluses and minuses. He would check with Joyce in payroll to prep up as early as possible. Check would go out as close to Xmas as possible.

There was much discussion regarding payroll processes and whether or not payments could be made by the winter break and/or whether knowing the amount by then would be sufficient. Doug felt that some preparation work in advance of knowing audited figures might help to speed the process. He will check with Joyce.

The group reached consensus to wait to determine salary adjustment processes when audit figures have been disclosed.





**PRODUCTIVE HOURLY RATE UPDATE**

Note: Please provide the rates for the FY: 04-05 the missing rates for FY: 03-04.

The FY 03-04 PHRs shown below are from a response to a doc request.

**COMMUNITY COLLEGE DISTRICT**

Sierra Joint Community College District

Name	Title	Fiscal Years:	
		03-04	04-05
	AVERAGE ADMINISTRATIVE ASSISTANT		
	AVERAGE ADMINISTRATIVE SECRETARY		
	AVERAGE ASSOCIATE DEAN		
	AVERAGE DEAN		
	AVERAGE EXECUTIVE SECRETARY		
	AVERAGE FACULTY		
	AVERAGE PRESIDENT		
	AVERAGE VICE PRESIDENT		
ALLBEE, NEAL	ASSOC. DEAN, PUBLIC SAFETY	\$ 76.24	
AMARO, BONNIE	FINANCIAL AID SPECIALIST		
BARNEY, JANICE	ADMINISTRATIVE ASSISTANT		
BASQUE, JOAN	ADMINISTRATIVE ASSISTANT		
BATES, MARTY	SR COMPUTER OPERATOR		
BERMAN, NANCY	DEAN OF BUSINESS HIGH TECH.		

**MANDATE REIMBURSEMENT SERVICES**

Name	Title	03-04	04-05
BIRDSONG, CYNDIE	PAYROLL TECHNICIAN		
BRAZIL, DONNA	NCC SUPERVISOR/ADMIN SUPPORT	\$ 46.31	
BRIDGES, KAREN	ADMINISTRATIVE SECRETARY		
CLARKSON, STEPHEN	CLASS/GROUNDS MAINTENANCE. II		
CONWAY, MARY	DEAN OF PHYSICAL EDUCATION		
CORBETT, DIANE	CLASS/ADMINISTRATIVE ASSISTANT I		
COSPER, DONALD	FACULTY		
CULLEY, CHRISTINA	ADMIN ASSISTANT		
CUNNINGHAM, RAY	ASSISTANT DIRECTOR OF PLANT OPERATIONS	\$ 52.64	
DAVENPORT, SUZANNE	PROFESSOR/LRC COORDIATOR		
DAVIES, MANDY	DEAN, STUDENT SERVICES	\$ 79.74	
DECOURTEN, FRANK	DEAN, TAHOE/TRUCKEE	\$ 75.03	
DOLLESIN, NINETTE	PROJECT MANAGER EP&S	\$ 54.68	
DRENNON, SUE	PERSONNEL ASSISTANT		
DUPIUS, JENNIFER	PAYROLL TECHNICIAN		
ECHAVARRIA, RUTH	ADMINISTRATIVE ASSISTANT		
EPTING-DAVIS, CARLA	DIRECTOR	\$ 72.29	
FISHER, SUE	EXECUTIVE SECRETARY/BOARD RECORDER		
GIESZELMANN, ED	FACULTY		



Sierra Commur. , College District

Name	Title			03-04 sal. Rate	04-05 sal.rate	03-04 PHR	04-05 PHR
Culley, Christina	Administrative Assistant	G	1	24.58	25.28	34.37	35.35
Cunningham, Ray	Assistant Director Plant Operations	E	2	90,677.00	93,265.00	60.96	62.69
Davenport, Suzanne	District Learning Coord. 195 days		2	81,925.00	84,264.00	66.09	67.97
Davies, Mandy	Assoc. VP Dean Student Svcs.		2	111,253.00	114,428.00	74.79	76.92
Decourten, Frank	Dean		2	104,299.00	107,276.00	70.11	72.11
Dollesin, Ninette	R&R Analyst	G	1	31.36	32.25	43.85	45.09
Drennon, Sue	Benefits Coordinator	E	2	58,007.00	59,663.00	38.99	40.11
Dupius, Jennifer	Payroll Technician		1	20.30	20.88	28.38	29.19
Echavarria, Ruth	Administrative Assistant	G	1	24.58	25.28	34.37	35.35
Epting-Davis, Carla	Assoc. Dean Student Services		2	97,346.00	100,124.00	65.44	67.31
Fisher, Sue	Exec. Secty, Board Recorder	E	2	58,007.00	59,663.00	38.99	40.11
Gieselmann, Ed	Math Center Coordinator 120 days		14	92,428.00	95,067.00	74.56	76.69
Gifford, Norman	Admin. Service Tech.	G	1	21.23	21.83	29.68	30.52
Goff, Arlene	Admin. Service Tech.	G	1	18.34	18.86	25.64	26.37
Green, Dolly	Manager Diversity	E	2	86,359.00	N/A	58.05	#VALUE!
Guevara, Stephanie	Associate Dean		2	97,346.00	107,276.00	65.44	72.11
Haley, Brian	Dean, LR Center		2	104,299.00	107,276.00	70.11	72.11
Hallam, Jene	Administrative Assistant		1	22.38	23.01	31.29	32.17
Hamblien, John	Residence Life Supervisor	E	2	61,374.00	63,125.00	41.26	42.43
Hanawalt, Carol	Student Fin. Assistance	G	1	23.40	24.06	32.72	33.64
Helwick, Sue	Mgr. Computer Operations	E	2	78,330.00	N/A	52.66	#VALUE!
Huthching, Sharon	Executive Secretary	E	2	58,007.00	59,663.00	38.99	40.11
Jackson, Darlene	Assoc. Dean, CDC		2	97,346.00	100,124.00	65.44	67.31
Jamison, Dianne	Admin. Tech. SBDC	G	1	21.23	21.83	29.68	30.52
Jung, Stephen	Professor		14	72,523.00	75,622.00	58.50	61.00
Kalina, Michelle	Professor Research Coord.-199 days		14	83,606.00	85,993.00	67.44	69.37
Kelley, Craig	R&R Analyst	G	1	31.36	32.25	43.85	45.09
Kleinbach, Mary	Exec. Secty, EP&S	E	2	58,007.00	59,663.00	38.99	40.11
Lee, Kelly	Payroll Technician		1	20.30	20.88	28.38	29.19
Lee, Lawrence	Dir. Risk, Feasibility & Loss Control		2	111,253.00	111,253.00	74.79	74.79
Leland, Jean	Employee Relations Analyst		2	67,665.00	69,596.00	45.49	46.78
Linde, Karen	Professor		14	73,523.00	75,622.00	59.31	61.00
Lopes, Joyce	Director, Of Finance		2	99,972.00	102,825.00	67.20	69.12
Ludutsky-Taylor Tina	Provost/NCC		2	118,206.00	121,580.00	79.46	81.73
Morgan, Lynn	Vice President, EP&S		2	121,206.00	124,681.00	81.48	83.81
Mackey, Jennifer	Assistant. Program Manager		2	55,668.00	57,266.00	37.42	38.50



Sierra Commur. College District

Name	Title			03-04 sal. Rate	04-05 sal.rate	03-04 PHR	04-05 PHR
Maifa, Dianne	Administrative Assistant	G	1	24.58	25.28	34.37	35.35
Martindale, Shirley	Administrative Secretary	G	1	20.23	20.80	28.29	29.08
Martinez, Ron	Assoc. VP Human Resources		2	111,253.00	114,428.00	74.79	76.92
McClymonds, Judy	Administrative Assistant	G	1	20.23	20.80	28.29	29.08
McDermid, Patti	Writing Center Coord.-220 days	14	2	92,428.00	95,067.00	74.56	76.69
McKinney, Diane	Administrative Secretary	G	1	20.23	20.80	28.29	29.08
McKnight, Diane	Associate Dean		2	97,346.00	100,124.00	65.44	67.31
McLaughlin, Carolyn	Accounting Technician	G	1	21.23	21.83	29.68	30.52
McVay, Susan	Executive Assistant	E	2	82,247.00	N/A	55.29	#VALUE!
Modder, Gail	Proj. Manager Customer Service	E	2	71,048.00	73,076.00	47.76	49.12
Navadereen, Soundera	PT Instructor		1	52.40	54.43	63.40	65.86
Newman, Shari	Telephone Services Technician	G	1	23.40	25.28	32.72	35.35
Nunnally, Delecia	Associate Dean		2	97,346.00	100,124.00	65.44	67.31
Poland, Becky	Curriculum Assistant	G	1	24.58	25.28	34.37	35.35
Powers, Jan	Comm. Education Program Manager	E	2	78,330.00	80,566.00	52.66	54.16
Prado, Doreen	Administrative Services Technician		1	19.34	19.89	27.04	27.81
Ramirez, Kevin	President		2	159,496.00	164,079.00	107.22	110.30
Reader, Vicki	Accounting Manager	E	2	82,247.00	N/A	55.29	#VALUE!
Rehwal, Wende	Health Svcs. Coord.- 205 days	14	2	86,126.00	88,585.00	69.47	71.46
Reid, Coral	Admin. Services Tech.	G	1	21.23	21.83	29.68	30.52
Roath, Lynn	EH&S Specialist	G	1	31.36	32.35	43.85	45.23
Roberts, Millie	Exec. Secty	E	2	58,007.00	59,663.00	38.99	40.11
Sanchez, Luis	Faculty		14	73,523.00	75,622.00	59.31	61.00
Schaeffer, Marcelle	SBDC Prog. Mgr.	E	2	78,330.00	80,566.00	52.66	54.16
Schneider, Greg	Purchasing Sup.	E	2	58,451.00	60,119.00	39.29	40.41
Schwenk, Lonnie	Chief of Police Svcs.	E	2	58,451.00	60,119.00	39.29	40.41
Scott, Sandra	Dir. Of Econ. Develop.		2	104,299.00	107,276.00	70.11	72.11
Sessions, Pam	Administrative Assistant	G	1	24.58	25.28	34.37	35.35
Shields, Tracy	Articulation Office	G	1	28.45	29.26	39.78	40.91
Siler, Tina	Human Resources Technician	G	1	24.58	25.28	34.37	35.35
Smalley, Craig	Data Admin/Dist Syst. Sec. Manager	E	2	74,600.00	76,729.00	50.15	51.58
Smith, Doug	VP Finance Admin		2	121,206.00	124,681.00	81.48	83.81
Snyder, Scott	Tech. Support Svcs. Mgr.	E	2	86,359.00	84,594.00	58.05	56.87
Thiers, Laurie	R&R Analyst	G	1	31.36	32.25	43.85	45.09
Tsuji, Bill	Dean, Liberal Arts		2	104,299.00	107,276.00	70.11	72.11
Vermillion, Rhonda	Payroll Technician		1	20.30	20.88	28.38	29.19

Sierra Community College District

Name	Title			03-04 sal. rate	04-05 sal.rate	03-04 PHR	04-05 PHR
Volek, John	Dean - PE Athletics	2	1	104,299.00	107,276.00	70.11	72.11
Walters, Dunlap, Karen	Dean, Science & Math	2	1	104,299.00	107,276.00	70.11	72.11
White, Margaret	Assoc. Dir. Nursing	2	1	97,346.00	100,124.00	65.44	67.31
Wickstrom, Robert	Dir. Buss. Svcs.	2	1	104,299.00	N/A	70.11	#VALUE!
Wilson, James	Instructional Asst.	G	1	24.58	25.28	34.37	35.35
Wilson, Woodrow	Dir. Planning & Research	2	1	104,299.00	107,276.00	70.11	72.11
Wollesen, Mary	Prog. Mgr. of SBDC	E	2	78,330.00	80,566.00	52.66	54.16
Yamamoto, Craig	Financial Svcs. Mgr	E	2	74,600.00	76,729.00	50.15	51.58
Yorde, Phil	Tech. Support Svcs. Mgr.	E	2	74,600.00	76,729.00	50.15	51.58

**MANDATE REIMBURSEMENT SERVICES**

**PRODUCTIVE HOURLY RATE UPDATE**

Note: Please provide the rates for the FY: 04-05 the missing rates for FY: 03-04.

The FY 03-04 PHRs shown below are from a response to a doc request.

**COMMUNITY COLLEGE DISTRICT**

Sierra Joint Community College District

Name	Title	Fiscal Years:	
		03-04	04-05
	AVERAGE ADMINISTRATIVE ASSISTANT		
	AVERAGE ADMINISTRATIVE SECRETARY		
	AVERAGE ASSOCIATE DEAN		
	AVERAGE DEAN		
	AVERAGE EXECUTIVE SECRETARY		
	AVERAGE FACULTY		
	AVERAGE PRESIDENT		
	AVERAGE VICE PRESIDENT		
ALLBEE, NEAL	ASSOC. DEAN, PUBLIC SAFETY	\$ 76.24	
AMARO, BONNIE	FINANCIAL AID SPECIALIST		
BARNEY, JANICE	ADMINISTRATIVE ASSISTANT		
BASQUE, JOAN	ADMINISTRATIVE ASSISTANT		
BATES, MARTY	SR COMPUTER OPERATOR		
BERMAN, NANCY	DEAN OF BUSINESS HIGH TECH.		

**MANDATE REIMBURSEMENT SERVICES**

Name	Title	03-04	04-05
BIRDSONG, CYNDIE	PAYROLL TECHNICIAN		
BRAZIL, DONNA	NCC SUPERVISOR/ADMIN SUPPORT	\$ 46.31	
BRIDGES, KAREN	ADMINISTRATIVE SECRETARY		
CLARKSON, STEPHEN	CLASS/GROUNDS MAINTENANCE. II		
CONWAY, MARY	DEAN OF PHYSICAL EDUCATION		
CORBETT, DIANE	CLASS/ADMINISTRATIVE ASSISTANT I		
COSPER, DONALD	FACULTY		
CULLEY, CHRISTINA	ADMIN ASSISTANT		
CUNNINGHAM, RAY	ASSISTANT DIRECTOR OF PLANT OPERATIONS	\$ 52.64	
DAVENPORT, SUZANNE	PROFESSOR/LRC COORDIATOR		
DAVIES, MANDY	DEAN, STUDENT SERVICES	\$ 79.74	
DECOURTEN, FRANK	DEAN, TAHOE/TRUCKEE	\$ 75.03	
DOLLESIN, NINETTE	PROJECT MANAGER EP&S	\$ 54.68	
DRENNON, SUE	PERSONNEL ASSISTANT		
DUPIUS, JENNIFER	PAYROLL TECHNICIAN		
ECHAVARRIA, RUTH	ADMINISTRATIVE ASSISTANT		
EPTING-DAVIS, CARLA	DIRECTOR	\$ 72.29	
FISHER, SUE	EXECUTIVE SECRETARY/BOARD RECORDER.		
GIESZELMANN, ED	FACULTY		

**MANDATE REIMBURSEMENT SERVICES**

Name	Title	03-04	04-05
GIFFORD, NORMAN	ADMINISTRATIVE SERVICE TECH.		
GOFF, ARLENE	FACILITIES PLANNING		
GREEN, DOLLY	MGR OF DIVERSITY PROGRAMS		
GUEVARA, STEPHANIE	PROFESSOR, BUSINESS	\$ 58.13	
HALEY, BRIAN	DEAN, LEARNING RESOURCE CTR	\$ 72.57	
HALLAM, JENE	SECRETARY		
HAMBLIN, JOHN	RESIDENCE LIFE SUPERVISOR		
HANAWALT, CAROL	FINANCIAL AID SPECIALIST		
HELWICK, SUE	MANAGER COMPUTER/NETWORK OPERATIONS		
HUTCHING, SHARON	ADMINISTRATIVE SECRETARY		
JACKSON, DARLENE	ASSOCIATE DEAN, CHILD DEVELOPMENT CENTER	\$ 67.95	
JAMISON, DIANNE	ADMINISTRATIVE TECH III/SBDC ECONOMICS DEVELOPMENT		
JUNG, STEPHEN	DEAN OF BUSINESS HIGH TECH.		
KALINA, MICHELLE	PROFESSOR-RESEARCH	\$ 70.85	
KELLEY, CRAIG	RESEARCH ANALYST		
KLEINBACH, MARY	EXECUTIVE SECRETARY - EP&S	\$ 46.44	
LEE, KELLY	PAYROLL TECHNICIAN		
LEE, LAWRENCE	ASST. VP. IT	\$ 81.28	
LELAND, JEAN	PERSONNEL ASSISTANT	\$ 47.95	

## MANDATE REIMBURSEMENT SERVICES

Name	Title	03-04	04-05
LINDE, KAREN	ATHLETIC DIRECTOR		
LOPES, JOYCE	DIRECTOR OF FINANCE	\$ 35.09	
LUDUTSKY-TAYLOR, TINA	EXEC. DEAN-WNCC	\$ 82.39	
LYNN, MORGAN	VP, EP & S	\$ 87.79	
MACKEY, JENNIFER	ASSISTANT PROG MGR-COMMUNITY ED	\$ 36.98	
MALFA, DIANNE	ADMIN ASSISTANT-CHILD DEVELOPMENT CTRS		
MARTINDALE, SHIRLEY	ADMIN. SECRETARY III		
MARTINEZ, RON	DIRECTOR, HUMAN RESOURCES	\$ 86.36	
MCCLYMONDS, JUDY	ADMIN. ASST.	\$ 44.40	
MCDERMID, PATT	FACULTY FACILITATOR		
McKINNEY, DIANE	ADMIN SECRETARY		
McKNIGHT, DIANE	ASSOC. DEAN LIBERAL ARTS	\$ 67.55	
MCLAUGHLIN, CAROLYN	ACCOUNTING TECHNICIAN		
McVAY, SUSAN (WILLIAMS)	EXECUTIVE ASSISTANT OF PUBLICATION		
MICHAELS, SUE	SUPERVISOR-MARKETING/PUBLIC RELATIONS		
MODDER, GAIL	PROJECT MANAGER CUSTOMER SERVICES		
NAVADEREEN, SOUNDERA	PT INSTRUCTOR		
NEWMAN, SHARI (JONES)	CLASS/COMMUNICATIONS. SERVICE TECH.		
NUNNALLY, DELECIA	ASSOCIATE DEAN, STUDENT SERVICES	\$ 68.71	

**MANDATE REIMBURSEMENT SERVICES**

Name	Title	03-04	04-05
PAULSON, JAN	MANAGER SYSTEMS/PROGRAMS		
POLAND, BECKY	ADMIN ASSISTANT-STUDENT SERVICES		
POWERS, JAN	COMMUNITY ED PROGRAM MANAGER		
PRADO, DOREEN	ADMINISTRATIVE TECHNICIAN		
RAMIREZ, KEVIN	PRESIDENT		
READER, VICKI	BUSINESS SERVICES SUPERVISOR	\$ 52.16	
REHWALD, WENDE	COLLEGE HEALTH NURSE PRACTITIONER		
REID, CORAL	ADMINISTRATIVE SERVICES TECH II		
ROATH, LYNN	ENVIRONMENT HEALTH & SAFETY SPECIALIST		
ROBERTS, MILLIE	EXECUTIVE SECRETARY	\$ 49.54	
SANCHEZ, LUIS	FACULTY		
SCHAEFFER, MARCELLE	PROGRAM MANAGER		
SCHNEIDER, GREG	PURCHASING SUPERVISOR	\$ 39.21	
SCHWENK, LONNIE	CHIEF OF POLICE SERVICES	\$ 46.95	
SCOTT, SANDRA	DIRECTOR OF ECONOMIC DEVELOPMENT	\$ 76.96	
SESSIONS, PAM	ADMIN. SERVICE TECH III		
SHIELDS, TRACY	ADMIN SVCS TECH III-RECORDS/EVALUATIONS		
SILER, TINA	HR DEVELOPMENT ASSISTANT		
SMALLEY, CRAIG	DATA ADMIN/DIST SYST SEC MGR		

## MANDATE REIMBURSEMENT SERVICES

Name	Title		03-04	04-05
SMITH, DOUG	VP FINANCE ADMIN.	\$	91.85	
SNYDER, SCOTT	TECH SUPPORT SERVICES MANAGER	\$	57.56	
SUMNER, JOANN	ASSOC DEAN CURRIC.			
THIERS, LAURIE	PROJECT MANAGER EP&S	\$	43.54	
TSUJI, BILL	DEAN, LIBERAL ARTS	\$	86.95	
VELAZQUEZ, NILO	BOOKSTORE MANAGER			
VERMILLION, RHONDA	PAYROLL TECHNICIAN			
VOLEK, JOHN	DEAN-P.E. ATHLETICS	\$	75.94	
WALTERS-DUNLAP, KAREN	DEAN, SCIENCE AND MATH	\$	73.26	
WHARFF, BEVERLY	PERSONNEL TECHNICIAN			
WHITE, MARGERET	ASSOC DIRECTOR NURSING	\$	70.35	
WICKSTROM, ROBERT	DIRECTOR OF BUSINESS SERVICES			
WILSON, JAMES	INSTRUCTIONAL ASST. III			
WILSON, WOODROW	DIRECTOR, PLANNING AND RESEARCH			
WOLLESEN, MARY	PROGRAM MANGER OF SBDC & ECONOMIC DEVELOPMENT	\$	61.50	
YAMAMOTO, CRAIG	FINANCIAL SERVICES MANAGER	\$	52.81	
YORDE, PHIL	TECH SUPPORT SERVICES MANAGER			





<b>CLAIM FOR PAYMENT</b> Pursuant to Government Code Section 17561 <b>COLLECTIVE BARGAINING</b>	For State Controller Use only (19) Program Number 00232 (20) Date Filed ___/___/___ (21) LRS Input ___/___/___	<b>Program 232</b>
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(01) Claimant Identification Number: CC31090	Reimbursement Claim Data	
(02) Claimant Name: Sierra Joint Community College District	(22) CB-1, (03)(1)(e)	
County of Location: Placer	(23) CB-1, (03)(2)(e)	68
Street Address: 5000 Rocklin Road	(24) CB-1, (03)(3)(e)	149,947
City: Rocklin State: CA Zip Code: 95677	(25) CB-1, (03)(4)(e)	

Type of Claim	Estimated Claim	Reimbursement Claim		
	(03) Estimated <input checked="" type="checkbox"/>	(09) Reimbursement <input checked="" type="checkbox"/>	(26) CB-1, (03)(5)(e)	
	(04) Combined <input type="checkbox"/>	(10) Combined <input type="checkbox"/>	(27) CB-1, (03)(6)(e)	34,032
	(05) Amended <input type="checkbox"/>	(11) Amended <input type="checkbox"/>	(28) CB-1, (03)(7)(e)	621
Fiscal Year of cost	(06) 2006-2007	(12) 2005-2006	(29) CB-1, (04)(d)	149,482
Total Claimed Amount	(07) \$ 177,000	(13) \$ 161,605	(30) CB-1, (04)(e)	184,668
Less: 10% Late Penalty, not to exceed \$1,000		(14) \$	(31) CB-1, (05)(e)	7,557
Less: Prior Claim Payment Received		(15) \$	(32) CB-1, (07)	155,354
Net Claimed Amount		(16) \$ 161,605	(33) CB-1, (11)	36
Due from State	(08) \$ 177,000	(17) \$ 161,605	(34) CB-1, (12)	6,251
Due to State		(18)	(35) CB-1, (14)	
			(36) CB-1, (15)	

**(37) CERTIFICATION OF CLAIM**

In accordance with the provisions of Government Code Section 17561, I certify that I am the officer authorized by the community college district to file mandated cost claims with the State of California for this program, and certify under penalty of perjury that I have not violated any of the provisions of Government Code Sections 1090 to 1098, inclusive.

I further certify that there was no application other than from the claimant, nor any grant or payment received, for reimbursement of costs claimed herein, and such costs are for a new program or increased level of services of an existing program. All offsetting savings and reimbursements set forth in the Parameters and Guidelines are identified, and all costs claimed are supported by source documentation currently maintained by the claimant.

The amounts for this Estimated Claim and/or Reimbursement Claim are hereby claimed from the State for payment of estimated and/or actual costs set forth on the attached statements. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Signature of Authorized Officer (USE BLUE INK)

*Joyce Lopes*

Joyce Lopes

Date

12/18/06

Director of Finance

Title

(38) Name of Contact Person for Claim

SixTen and Associates

Telephone Number: (858) 514-8605

E-mail Address: kbpsixten@aol.com

<b>Program 232</b>	<b>MANDATED COSTS COLLECTIVE BARGAINING CLAIM SUMMARY</b>	<b>FORM CB-1</b>
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(0) Applicant: Sierra Joint Community College District	(02) Type of Claim Reimbursement <input checked="" type="checkbox"/> Estimated <input type="checkbox"/>	Fiscal Year 2005-2006
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Rodda Act Direct Costs	Cost Elements				
(03) Reimbursable Components	(a) Salaries and Benefits	(b) Materials and Supplies	(c) Travel and Training	(d) Contract Services	(e) Total
1. Determining Bargaining Units and Exclusive Representation	\$ -	\$ -	\$ -	\$ -	\$ -
2. Election of Unit Representation	\$ -	\$ -	\$ -	\$ 67.50	\$ 67.50
3. Cost of Negotiations	\$ 31,294.04	\$ -	\$ -	\$ 118,652.97	\$ 149,947.01
4. Impasse Proceedings	\$ -	\$ -	\$ -	\$ -	\$ -
5. Collective Bargaining Agreement Disclosure	\$ -	\$ -	\$ -	\$ -	\$ -
6. Contract Administration	\$ 3,851.25	\$ -	\$ -	\$ 30,180.66	\$ 34,031.91
- Unfair Labor Practice Charges	\$ 40.97	\$ -	\$ -	\$ 580.50	\$ 621.47
<b>(04) Total Rodda Act Direct Costs</b>	<b>\$ 35,186.26</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 149,481.63</b>	<b>\$ 184,667.89</b>

<b>Winton Act Direct Costs</b>					
(05) Base Year, 1974-75 Direct Costs	\$ 4,453.00	\$ -	\$ 104.00	\$ 3,000.00	\$ 7,557.00
(06) Base Year Direct Costs Adjusted by IPD	[Line (05)(e) x 3.879 for 2005-2006 F.Y.]				\$ 29,313.60
(07) Increased Direct Costs	[Line (04)(e) - line (06)]				\$ 155,354.29

<b>Indirect Costs</b>					
(08) Total Rodda Act Direct Costs less Contracted Services	[Line (04)(e) - line (04)(d)]				\$ 35,186.26
(09) Base Year Costs less Contracted Services adjusted by IPD	[Line (05)(e) - line (05)(d)] x 3.879				\$ 17,676.60
(10) Increased Direct Costs less Contract Services	[Line (08) - line (09)]				\$ 17,509.66
(11) Indirect Cost Rate	[Federally approved OMB A-21, FAM-29C, or 7%]				35.70%
(12) Increased Indirect Costs	[Line (10) x line (11)]				\$ 6,250.95
(13) Total Increased Direct and Indirect Costs	[Line (07) + line (12)]				\$ 161,605.23

<b>Cost Reduction</b>					
Less: Offsetting Savings					\$ -
(15) Less: Other Reimbursements					\$ -
<b>(16) Total Claimed Amount:</b>	<b>[Line (13) - {Line (14) + Line (15)}</b>				<b>\$ 161,605.23</b>

<b>Program</b> <b>232</b>	<b>MANDATED COSTS</b> <b>COLLECTIVE BARGAINING</b> <b>COMPONENT/ACTIVITY COST DETAIL</b>						<b>FORM</b> <b>CB-2</b>
(01) Claimant Sierra Joint Community College District				(02) Fiscal Year Costs Were Incurred 2005-2006			
(03) Reimbursable Components: Check only one box per form to identify the component being claimed.							
<input type="checkbox"/> Determining Bargaining Units and Exclusive Representation		<input type="checkbox"/> Collective Bargaining Agreement Disclosure					
<input checked="" type="checkbox"/> Election of Unit Representation		<input type="checkbox"/> Contract Administration					
<input type="checkbox"/> Cost of Negotiations		<input type="checkbox"/> Unfair Labor Practice Charges					
<input type="checkbox"/> Impasse Proceedings							
(04) Description of Expenses				<b>Object Accounts</b>			
(a)	(b)	(c)	(d)	(e)	(f)	(g)	
Employee Names, Job Classifications, Functions Performed and Description of Expenses	Hourly Rate or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Travel	Contract Services	
Developing and preparing a precinct voting list Johnson Schaecter Lewis Attorneys	\$135.00	0.5				\$ 67.50	
(05) Total <input checked="" type="checkbox"/> Subtotal <input type="checkbox"/>			\$ -	\$ -	\$ -	\$ 67.50	

State Controller's Office

Program <b>232</b>	MANDATED COSTS COLLECTIVE BARGAINING COMPONENT/ACTIVITY COST DETAIL						FORM CB-2
(01) Claimant Sierra Joint Community College District				(02) Fiscal Year Costs Were Incurred 2005-2006			
(03) Reimbursable Components: Check only one box per form to identify the component being claimed.							
<input type="checkbox"/> Determining Bargaining Units and Exclusive Representation		<input type="checkbox"/> Collective Bargaining Agreement Disclosure					
<input type="checkbox"/> Election of Unit Representation		<input type="checkbox"/> Contract Administration					
<input checked="" type="checkbox"/> Cost of Negotiations		<input type="checkbox"/> Unfair Labor Practice Charges					
<input type="checkbox"/> Impasse Proceedings							
(04) Description of Expenses				Object Accounts			
(a) Employee Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel	(g) Contract Services	
At-Table Negotiations: Certificated							
Martinez, Ron Associate VP Human Resources	\$87.40	2.5	\$ 218.50				
Walters-Dunlap, Karen Dean, Science and Math	\$73.09	2.5	\$ 182.73				
McKnight, Diane Assoc. Dean Liberal Arts	\$74.28	2.5	\$ 185.70				
At-Table Negotiations: Classified							
Leland, Jean Employee Relations Analyst	\$49.12	49.0	\$ 2,406.88				
Martinez, Ron Associate VP Human Resources	\$87.40	62.7	\$ 5,479.98				
Smith, Doug VP Finance Administration	\$87.90	39.5	\$ 3,472.05				
Haley, Brian Dean, Learning Resource Center	\$72.11	44.7	\$ 3,223.32				
Lopes, Joyce Director of Finance	\$71.13	10.0	\$ 711.30				
McKnight, Diane Assoc. Dean Liberal Arts	\$74.28	45.2	\$ 3,357.46				
Davies, Mandy Associate VP Dean, Student Services	\$79.23	3.0	\$ 237.69				
Schwenk, Lonnie Chief of Police Services	\$44.98	36.7	\$ 1,650.77				
Schneider, Greg Purchasing Supervisor	\$40.41	12.5	\$ 505.13				
Michaels, Sue Supervisor/Marketing/Public Relations	\$49.12	6.0	\$ 294.72				
Preparing for negotiations							
Johnson Schacter Lewis Attorneys	\$135.00	645.2				\$ 87,102.00	
John L. Bukey Attorneys	\$125.00	38.0				\$ 4,750.00	
Martinez, Ron Associate VP Human Resources	\$87.40	1.8	\$ 157.32				
Smith, Doug VP Finance Administration	\$87.90	1.8	\$ 158.22				
*At-table* negotiations with employee representatives							
Johnson Schacter Lewis Attorneys	\$135.00	39.9				\$ 5,386.50	
Johnson, Schacter Lewis Attorney Expenses	\$1.00	483.2				\$ 483.22	
John L. Bukey Attorneys	\$125.00	159.8				\$ 19,968.75	
John Bukey Attorney Expenses	\$1.00	962.5				\$ 962.50	
Leland, Jean Employee Relations Analyst	\$49.12	16.0	\$ 785.92				
Martinez, Ron Associate VP Human Resources	\$87.40	25.0	\$ 2,185.00				
Haley, Brian Dean, Learning Resource Center	\$72.11	16.0	\$ 1,153.76				
Lopes, Joyce Director of Finance	\$71.13	25.0	\$ 1,778.25				
McDermid, Palt Writing Center Coordinator	\$80.16	13.0	\$ 1,042.08				
McKnight, Diane Assoc. Dean Liberal Arts	\$74.28	18.0	\$ 1,337.04				
Schneider, Greg Purchasing Supervisor	\$40.41	3.0	\$ 121.23				
Scott, Sandra Director of Economic Development	\$72.11	9.0	\$ 648.99				
<b>Total</b> <input checked="" type="checkbox"/>			\$ 31,294.04	\$ -	\$ -	\$ 118,652.97	
<b>Subtotal</b> <input type="checkbox"/>							

Program <b>232</b>	MANDATED COSTS COLLECTIVE BARGAINING COMPONENT/ACTIVITY COST DETAIL						FORM CB-2
(01) Claimant Sierra Joint Community College District				(02) Fiscal Year Costs Were Incurred 2005-2006			
(03) Reimbursable Components: Check only one box per form to identify the component being claimed.							
<input type="checkbox"/> Determining Bargaining Units and Exclusive Representation		<input type="checkbox"/> Collective Bargaining Agreement Disclosure					
<input type="checkbox"/> Election of Unit Representation		<input checked="" type="checkbox"/> Contract Administration					
<input type="checkbox"/> Cost of Negotiations		<input type="checkbox"/> Unfair Labor Practice Charges					
<input type="checkbox"/> Impasse Proceedings							
(04) Description of Expenses				Object Accounts			
(a) Employee Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel	(g) Contract Services	
CCD Tenure disputes						\$ 4 050.00	
Johnson Schacter Lewis Attorneys	\$135.00	30.0					
Decourten Frank Interim VP. Education Programs & Services	\$86.33	0.6	\$ 51.80				
CCD Title 5 complaints						\$ 54.00	
Johnson Schacter Lewis Attorneys	\$135.00	0.4					
Decourten Frank Interim VP. Education Programs & Services	\$86.33	0.2	\$ 17.27				
Contract Administration							
Martinez, Ron Associate VP Human Resources	\$87.40	0.5	\$ 43.70				
Smith, Doug VP Finance Administration	\$87.90	0.4	\$ 35.16				
Guevara, Stephanie Associate Dean	\$72.11	2.2	\$ 158.64				
Decourten Frank Interim VP. Education Programs & Services	\$86.33	2.2	\$ 189.93				
White, Margaret Assoc. Director Nursing	\$70.71	1.0	\$ 70.71				
Haley, Brian Dean, Learning Resource Center	\$72.11	0.8	\$ 57.69				
McKnight, Diane Assoc. Dean Liberal Arts	\$74.28	2.2	\$ 163.42				
Davies, Mandy Associate VP Dean, Student Services	\$79.23	1.7	\$ 134.69				
Scott, Sandra Director of Economic Development	\$72.11	2.2	\$ 158.64				
Allbee, Neal Assoc. Dean, Public Safety	\$78.03	2.2	\$ 171.67				
Bray, Kevin Interim Dean, Counseling	\$76.47	1.2	\$ 91.76				
Hallberg, Kaylene Dean, Counseling	\$67.31	2.2	\$ 148.08				
Jackson, Darlene Assoc. Dean, Child Development Center	\$67.31	1.7	\$ 114.43				
Kleinbach, Mary Executive Secretary-EP&S	\$47.76	2.2	\$ 105.07				
Rantz, Rick Dean, Truckee Center	\$73.09	1.2	\$ 87.71				
Siemers, Becky Interim Associate Dean	\$71.69	1.2	\$ 86.03				
Stuphen, Debra Dean, Liberal Arts	\$68.28	1.3	\$ 88.76				
Ludulsky-Taylor, Tina Provost NCC	\$82.70	0.5	\$ 41.35				
Tsuiji, Bill Dean, Liberal Arts	\$72.11	1.7	\$ 122.59				
Volek, John Dean, P.E. Athletics	\$72.11	2.2	\$ 158.64				
Contract administration committees							
Leland, Jean Employee Relations Analyst	\$49.12	3.5	\$ 171.92				
Martinez, Ron Associate VP Human Resources	\$87.40	3.5	\$ 305.90				
Smith, Doug VP Finance Administration	\$87.90	1.5	\$ 131.85				
White, Margaret Assoc. Director Nursing	\$70.71	1.0	\$ 70.71				
Haley, Brian Dean, Learning Resource Center	\$72.11	1.0	\$ 72.11				
Lopes, Joyce Director of Finance	\$71.13	3.5	\$ 248.96				
Drennon, Sue Benefits Coordinator	\$51.58	1.0	\$ 51.58				
McDermid, Palt Writing Center Coordinator	\$80.16	2.5	\$ 200.40				
Lee, Lawrence Director, Risk, Feasability & Loss Control	\$78.57	2.5	\$ 196.43				
Contract Interpretation						\$ 23 328.00	
Johnson Schacter Lewis Attorneys	\$135.00	172.8					
Johnson, Schacter Lewis Attorney Expenses	\$1.00	167.7				\$ 167.66	
(05) Total <input checked="" type="checkbox"/>	Subtotal <input type="checkbox"/>	Page 1 of 2		\$ 3,747.60	\$ -	\$ -	\$ 27,599.66

State Controller's Office

<b>Program</b> <b>232</b>	<b>MANDATED COSTS</b> <b>COLLECTIVE BARGAINING</b> <b>COMPONENT/ACTIVITY COST DETAIL</b>						<b>FORM</b> <b>CB-2</b>
(01) Claimant Sierra Joint Community College District				(02) Fiscal Year Costs Were Incurred 2005-2006			
(03) Reimbursable Components: Check only one box per form to identify the component being claimed.							
<input type="checkbox"/> Determining Bargaining Units and Exclusive Representation	<input type="checkbox"/> Collective Bargaining Agreement Disclosure						
<input type="checkbox"/> Election of Unit Representation	<input checked="" type="checkbox"/> Contract Administration						
<input type="checkbox"/> Cost of Negotiations	<input type="checkbox"/> Unfair Labor Practice Charges						
<input type="checkbox"/> Impasse Proceedings							
(04) Description of Expenses				<b>Object Accounts</b>			
(a) Employee Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Travel	(g) Contract Services	
Community College League - Online Collective Bargaining Database	\$1.00	2,500.0				\$ 2,500.00	
Grievance Arbitration Walters-Dunlap, Karen     Dean, Science and Math	\$73.09	1.3	\$ 95.02				
Grievances Johnson Schachter Lewis     Attorneys	\$135.00	0.6				\$ 81.00	
Decourten Frank     Interim VP, Education Programs & Services	\$86.33	0.1	\$ 8.63				
			\$ 3,851.25	\$ -	\$ -	\$ 30,180.66	
(05) Total <input checked="" type="checkbox"/>	Subtotal <input type="checkbox"/>		Page 2 of 2				

Revised 09/03

State Controller's Office

<b>Program</b> <b>232</b>	<b>MANDATED COSTS</b> <b>COLLECTIVE BARGAINING</b> <b>COMPONENT/ACTIVITY COST DETAIL</b>						<b>FORM</b> <b>CB-2</b>
(01) Claimant Sierra Joint Community College District				(02) Fiscal Year Costs Were Incurred 2005-2006			
(03) Reimbursable Components: Check only one box per form to identify the component being claimed.							
<input type="checkbox"/> Determining Bargaining Units and Exclusive Representation		<input type="checkbox"/> Collective Bargaining Agreement Disclosure					
<input type="checkbox"/> Election of Unit Representation		<input type="checkbox"/> Contract Administration					
<input type="checkbox"/> Cost of Negotiations		<input checked="" type="checkbox"/> Unfair Labor Practice Charges					
<input type="checkbox"/> Impasse Proceedings							
(04) Description of Expenses				<b>Object Accounts</b>			
(a)	(b)	(c)	(d)	(e)	(f)	(g)	
Employee Names, Job Classifications, Functions Performed and Description of Expenses	Hourly Rate or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Travel	Contract Services	
Preparing for PERB actions							
Johnson Schacter Lewis Attorneys	\$135.00	4.3				\$ 580.50	
Leland, Jean Employee Relations Analyst	\$49.12	0.1	\$ 4.91				
Guevara, Stephanie Associate Dean	\$72.11	0.5	\$ 36.06				
			\$ 40.97	\$ -	\$ -	\$ 580.50	
(05) Total <input checked="" type="checkbox"/>	Subtotal <input type="checkbox"/>		Page 1 of 1				

Revised 09/03



Sierra Joint Community College District  
 96175 COLLECTIVE BARGAINING  
 2005-2006  
 Sort by Name

Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
Schedule 2	2.20	Allbee, Neal	Assoc. Dean, Public Safety	\$78.03	\$171.67	Contract Administration	Contract Administration
Schedule 2	2.20	Allbee, Neal Total			\$171.67		
Schedule 2	1.20	Bray, Kevin	Interim Dean, Counseling	\$76.47	\$91.76	Contract Administration	Contract Administration
Schedule 2	1.20	Bray, Kevin Total			\$91.76		
2005-2006	2500.00	Community College League of CA	Online Collective Bargaining Database	\$1.00	\$2,500.00	Contract Interpretation	Contract Administration
2005-2006	2500.00	Community College League of CA Total			\$2,500.00		
Schedule 1	3.00	Davies, Mandy	Associate VP Dean, Student Services	\$79.23	\$237.69	At-Table Negotiations: Classified	Cost of Negotiations
Schedule 2	1.70	Davies, Mandy	Associate VP Dean, Student Services	\$79.23	\$134.69	Contract Administration	Contract Administration
Schedule 2	4.70	Davies, Mandy Total			\$372.38		
Johnson 2	0.60	Decourten Frank	Interim VP, Education Programs & Services	\$86.33	\$51.80	CCD Tenure disputes	Contract Administration
Johnson 2	0.10	Decourten Frank	Interim VP, Education Programs & Services	\$86.33	\$8.63	Grievances	Contract Administration
Johnson 2	0.20	Decourten Frank	Interim VP, Education Programs & Services	\$86.33	\$17.27	CCD Title 5 complaints	Contract Administration
Schedule 2	2.20	Decourten Frank	Interim VP, Education Programs & Services	\$86.33	\$189.93	Contract Administration	Contract Administration
Schedule 2	3.10	Decourten Frank Total			\$267.63		
9/28/2005	1.00	Drennon, Sue	Benefits Coordinator	\$51.58	\$51.58	Contract administration committees	Contract Administration
Johnson 2	1.00	Drennon, Sue Total			\$51.58		
Schedule 2	0.50	Guevara, Stephanie	Associate Dean	\$72.11	\$36.06	Preparing for PERB actions	Unfair Labor Practice Charges
Schedule 2	2.20	Guevara, Stephanie	Associate Dean	\$72.11	\$158.64	Contract Administration	Contract Administration
Schedule 2	2.70	Guevara, Stephanie Total			\$194.70		
9/2/2005	4.00	Haley, Brian	Dean, Learning Resource Center	\$72.11	\$288.44	"At-table" negotiations with employee representatives	Cost of Negotiations
9/28/2005	1.00	Haley, Brian	Dean, Learning Resource Center	\$72.11	\$72.11	Contract administration committees	Contract Administration
Schedule 1	44.70	Haley, Brian	Dean, Learning Resource Center	\$72.11	\$3,223.32	At-Table Negotiations: Classified	Cost of Negotiations
Schedule 2	0.80	Haley, Brian	Dean, Learning Resource Center	\$72.11	\$57.69	Contract Administration	Contract Administration
Schedule 3	6.00	Haley, Brian	Dean, Learning Resource Center	\$72.11	\$432.66	"At-table" negotiations with employee representatives	Cost of Negotiations
Schedule 4	6.00	Haley, Brian	Dean, Learning Resource Center	\$72.11	\$432.66	"At-table" negotiations with employee representatives	Cost of Negotiations
Schedule 4	62.50	Haley, Brian Total			\$4,506.88		
Schedule 2	2.20	Hallberg, Kaylene	Dean, Counseling	\$67.31	\$148.08	Contract Administration	Contract Administration
Schedule 2	2.20	Hallberg, Kaylene Total			\$148.08		
Schedule 2	1.70	Jackson, Darlene	Assoc. Dean, Child Development Center	\$67.31	\$114.43	Contract Administration	Contract Administration
Schedule 2	1.70	Jackson, Darlene Total			\$114.43		
Bukey 1	962.50	John Bukey	Attorney Expenses	\$1.00	\$962.50	"At-table" negotiations with employee representatives	Cost of Negotiations
Bukey 1	962.50	John Bukey Total			\$962.50		
Bukey 1	38.00	John L. Bukey	Attorneys	\$125.00	\$4,750.00	Preparing for negotiations	Cost of Negotiations
Bukey 1	159.75	John L. Bukey	Attorneys	\$125.00	\$19,968.75	"At-table" negotiations with employee representatives	Cost of Negotiations
Johnson 1	197.75	John L. Bukey Total			\$24,718.75		
Johnson 1	645.20	Johnson Schacter Lewis	Attorneys	\$135.00	\$87,102.00	Preparing for negotiations	Cost of Negotiations

Sierra Joint Cor ty College District  
 96/175 COLLECTIVE BARGAINING  
 2005-2006  
 Sort by Name

Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
Johnson 1	39.90	Johnson Schacter Lewis	Attorneys	\$135.00	\$5,386.50	"At-table" negotiations with employee representatives	Cost of Negotiations
Johnson 1	172.80	Johnson Schacter Lewis	Attorneys	\$135.00	\$23,328.00	Contract Interpretation	Contract Administration
Johnson 1	0.60	Johnson Schacter Lewis	Attorneys	\$135.00	\$81.00	Grievances	Contract Administration
Johnson 1	30.00	Johnson Schacter Lewis	Attorneys	\$135.00	\$4,050.00	CCD Tenure disputes	Contract Administration
Johnson 1	0.40	Johnson Schacter Lewis	Attorneys	\$135.00	\$54.00	CCD Title 5 complaints	Contract Administration
Johnson 1	4.30	Johnson Schacter Lewis	Attorneys	\$135.00	\$580.50	Preparing for PERB actions	Unfair Labor Practice Charges
Johnson 1	0.50	Johnson Schacter Lewis	Attorneys	\$135.00	\$67.50	Developing and preparing a precinct voting list	Election of Unit Represent
Johnson 1	893.70	Johnson Schacter Lewis Total			\$120,649.50		
Johnson 1	483.22	Johnson, Schacter Lewis	Attorney Expenses	\$1.00	\$483.22	"At-table" negotiations with employee representatives	Cost of Negotiations
Johnson 1	167.66	Johnson, Schacter Lewis	Attorney Expenses	\$1.00	\$167.66	Contract Interpretation	Contract Administration
Schedule 2	650.88	Johnson, Schacter Lewis Total			\$650.88		
Schedule 2	2.20	Kleinbach, Mary	Executive Secretary-EP&S	\$47.76	\$105.07	Contract Administration	Contract Administration
Schedule 5	2.50	Lee, Lawrence	Director, Risk, Feasibility & Loss Control	\$78.57	\$196.43	Contract administration committees	Contract Administration
9/2/2005	2.50	Lee, Lawrence Total			\$196.43		
9/28/2005	4.00	Leland, Jean	Employee Relations Analyst	\$49.12	\$196.48	"At-table" negotiations with employee representatives	Cost of Negotiations
Johnson 2	1.00	Leland, Jean	Employee Relations Analyst	\$49.12	\$49.12	Contract administration committees	Contract Administration
Schedule 1	0.10	Leland, Jean	Employee Relations Analyst	\$49.12	\$4.91	Preparing for PERB actions	Unfair Labor Practice Charges
Schedule 3	49.00	Leland, Jean	Employee Relations Analyst	\$49.12	\$2,406.88	At-Table Negotiations: Classified	Cost of Negotiations
Schedule 4	9.00	Leland, Jean	Employee Relations Analyst	\$49.12	\$442.08	"At-table" negotiations with employee representatives	Cost of Negotiations
Schedule 5	3.00	Leland, Jean	Employee Relations Analyst	\$49.12	\$147.36	"At-table" negotiations with employee representatives	Cost of Negotiations
9/2/2005	68.60	Leland, Jean Total			\$122.80	Contract administration committees	Contract Administration
9/28/2005	4.00	Lopes, Joyce	Director of Finance	\$71.13	\$284.52	"At-table" negotiations with employee representatives	Cost of Negotiations
Schedule 1	1.00	Lopes, Joyce	Director of Finance	\$71.13	\$71.13	Contract administration committees	Contract Administration
Schedule 3	10.00	Lopes, Joyce	Director of Finance	\$71.13	\$711.30	At-Table Negotiations: Classified	Cost of Negotiations
Schedule 4	15.00	Lopes, Joyce	Director of Finance	\$71.13	\$1,066.95	"At-table" negotiations with employee representatives	Cost of Negotiations
Schedule 5	6.00	Lopes, Joyce	Director of Finance	\$71.13	\$426.78	"At-table" negotiations with employee representatives	Cost of Negotiations
Schedule 2	38.50	Lopes, Joyce Total			\$177.83	Contract administration committees	Contract Administration
9/2/2005	0.50	Ludutsky-Taylor, Tina	Provost NCC	\$82.70	\$41.35	Contract Administration	Contract Administration
9/28/2005	4.00	Martinez, Ron	Associate VP Human Resources	\$87.40	\$349.60	"At-table" negotiations with employee representatives	Cost of Negotiations
4/27/2006	1.00	Martinez, Ron	Associate VP Human Resources	\$87.40	\$87.40	Contract administration committees	Contract Administration
Johnson 2	2.50	Martinez, Ron	Associate VP Human Resources	\$87.40	\$218.50	At-Table Negotiations: Certificated	Cost of Negotiations
Johnson 2	1.80	Martinez, Ron	Associate VP Human Resources	\$87.40	\$157.32	Preparing for negotiations	Cost of Negotiations

Sierra Joint Community College District  
 961175 COLLECTIVE BARGAINING  
 2005-2006  
 Sort by Name

Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
Schedule 1	62.70	Martinez, Ron	Associate VP Human Resources	\$87.40	\$5,479.98	At-Table Negotiations: Classified	Cost of Negotiations
Schedule 2	0.50	Martinez, Ron	Associate VP Human Resources	\$87.40	\$43.70	Contract Administration	Contract Administration
Schedule 3	15.00	Martinez, Ron	Associate VP Human Resources	\$87.40	\$1,311.00	"At-table" negotiations with employee representatives	Cost of Negotiations
Schedule 4	6.00	Martinez, Ron	Associate VP Human Resources	\$87.40	\$524.40	"At-table" negotiations with employee representatives	Cost of Negotiations
Schedule 5	2.50	Martinez, Ron	Associate VP Human Resources	\$87.40	\$218.50	Contract administration committees	Contract Administration
	96.00	<b>Martinez, Ron Total</b>			\$8,390.40		
9/2/2005	4.00	McDermid, Patt	Writing Center Coordinator	\$80.16	\$320.64	"At-table" negotiations with employee representatives	Cost of Negotiations
Schedule 3	6.00	McDermid, Patt	Writing Center Coordinator	\$80.16	\$480.96	"At-table" negotiations with employee representatives	Cost of Negotiations
Schedule 4	3.00	McDermid, Patt	Writing Center Coordinator	\$80.16	\$240.48	"At-table" negotiations with employee representatives	Cost of Negotiations
Schedule 5	2.50	McDermid, Patt	Writing Center Coordinator	\$80.16	\$200.40	Contract administration committees	Contract Administration
	15.50	<b>McDermid, Patt Total</b>			\$1,242.48		
4/27/2005	2.50	McKnight, Diane	Assoc. Dean Liberal Arts	\$74.28	\$185.70	At-Table Negotiations: Certificated	Cost of Negotiations
Schedule 1	45.20	McKnight, Diane	Assoc. Dean Liberal Arts	\$74.28	\$3,357.46	At-Table Negotiations: Classified	Cost of Negotiations
Schedule 2	2.20	McKnight, Diane	Assoc. Dean Liberal Arts	\$74.28	\$163.42	Contract Administration	Contract Administration
Schedule 3	15.00	McKnight, Diane	Assoc. Dean Liberal Arts	\$74.28	\$1,114.20	"At-table" negotiations with employee representatives	Cost of Negotiations
Schedule 4	3.00	McKnight, Diane	Assoc. Dean Liberal Arts	\$74.28	\$222.84	"At-table" negotiations with employee representatives	Cost of Negotiations
	67.90	<b>McKnight, Diane Total</b>			\$5,043.62		
Schedule 1	6.00	Michaels, Sue	Supervisor/Marketing/Public Relations	\$49.12	\$294.72	At-Table Negotiations: Classified	Cost of Negotiations
Schedule 2	1.20	Rantz, Rick	Dean, Truckee Center	\$73.09	\$87.71	Contract Administration	Contract Administration
Schedule 1	12.50	Schneider, Greg	Purchasing Supervisor	\$40.41	\$505.13	At-Table Negotiations: Classified	Cost of Negotiations
Schedule 4	3.00	Schneider, Greg	Purchasing Supervisor	\$40.41	\$121.23	"At-table" negotiations with employee representatives	Cost of Negotiations
	15.50	<b>Schneider, Greg Total</b>			\$626.36		
Schedule 1	36.70	Schwenk, Lonnie	Chief of Police Services	\$44.98	\$1,650.77	At-Table Negotiations: Classified	Cost of Negotiations
Schedule 2	2.20	Scott, Sandra	Director of Economic Development	\$72.11	\$158.64	Contract Administration	Contract Administration
Schedule 3	9.00	Scott, Sandra	Director of Economic Development	\$72.11	\$648.99	"At-table" negotiations with employee representatives	Cost of Negotiations
	11.20	<b>Scott, Sandra Total</b>			\$807.63		
Schedule 2	1.20	Siemers, Becky	Interim Associate Dean	\$71.69	\$86.03	Contract Administration	Contract Administration
Johnson 2	1.80	Smith, Doug	VP Finance Administration	\$87.90	\$158.22	Preparing for negotiations	Cost of Negotiations
Schedule 1	39.50	Smith, Doug	VP Finance Administration	\$87.90	\$3,472.05	At-Table Negotiations: Classified	Cost of Negotiations
Schedule 2	0.40	Smith, Doug	VP Finance Administration	\$87.90	\$35.16	Contract Administration	Contract Administration
Schedule 5	1.50	Smith, Doug	VP Finance Administration	\$87.90	\$131.85	Contract administration committees	Contract Administration
	43.20	<b>Smith, Doug Total</b>			\$3,797.28		

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Sierra Joint Coity College District  
 96175 COLLECTIVE BARGAINING  
 2005-2006  
 Sort by Name

Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
Schedule 2	1.30	Stuphen, Debra	Dean, Liberal Arts	\$68.28	\$88.76	Contract Administration	Contract Administration
Schedule 2	1.30	Stuphen, Debra Total		\$72.11	\$122.59	Contract Administration	Contract Administration
Schedule 2	1.70	Tsuji, Bill	Dean, Liberal Arts	\$72.11	\$122.59	Contract Administration	Contract Administration
Schedule 2	1.70	Tsuji, Bill Total		\$73.09	\$158.64	Contract Administration	Contract Administration
Schedule 2	2.20	Volek, John	Dean, P.E. Athletics	\$73.09	\$158.64	At-Table Negotiations: Certificated	Cost of Negotiations
4/27/2006	2.20	Volek, John Total		\$73.09	\$95.02	Grievance Arbitration	Contract Administration
Schedule 2	2.50	Walters-Dunlap, Karen	Dean, Science and Math	\$70.71	\$277.75	Contract administration committees	Contract Administration
Schedule 2	1.30	Walters-Dunlap, Karen	Dean, Science and Math	\$70.71	\$70.71	Contract Administration	Contract Administration
9/28/2005	3.80	Walters-Dunlap, Karen Total		\$141.42	\$184,667.89		
Schedule 2	1.00	White, Margaret	Assoc. Director Nursing				
Schedule 2	1.00	White, Margaret	Assoc. Director Nursing				
Schedule 2	2.00	White, Margaret Total					
	5703.83	Grand Total					

COMMUNITY COLLEGE LEAGUE OF CALIFORNIA  
2017 O STREET  
SACRAMENTO, CA 95814

**ONLINE COLLECTIVE BARGAINING DATABASE  
I N V O I C E**

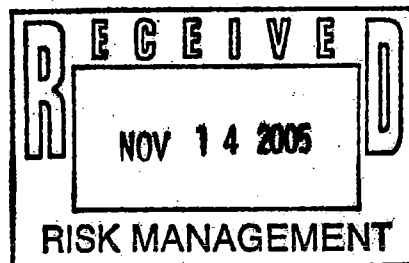
TO: Jeanne Leland  
Human Resources Analyst  
Sierra Joint CCD  
5000 Rocklin Rd  
Rocklin CA 95677-3397

9/22/05

Description	Total
California Community College Online Collective Bargaining Database	
Subscription from December 1, 2005 – November 30, 2006	\$2,500

Please make check or warrant payable to the Community College League of California  
and send with one copy of this invoice to the address above.

*chk to pay  
9/23/05*





Billing Date	Service Date	Employee Contact	Employee Time	Component 2		Component 3			Component 6					Component 7			
				Election of Union Representative	RU	NP	NT	Costs	AI	AG	AGT	AT5	Costs	PERB	UP		
	9/29					0.10											
	9/1							\$139.91									
	9/4																
	9/14	S. Guevara	0.50									5.60					
10/27/2005	9/9											5.00					
	9/15																
	10/17																
	10/12																
11/2/2005	10/7					5.00											0.80
	10/10					1.20	2.80										0.60
	10/11					5.00											0.20
	10/12					6.50											
	10/13					7.00											
	10/14					4.50											
	10/17					0.30											
	10/18					6.50											
	10/19					5.00											
	10/20					6.10											
	10/21					7.00											
	10/24					3.80											
	10/25					5.20											
	10/26					0.70											
	10/27					5.00											
	10/28					6.00											
	10/31					1.00	1.80										
	10/1							\$66.32									
12/21/2005	11/1								1.10								
	11/4																
	11/1					4.30											
	11/2					1.30											
	11/3					6.00											
	11/7					3.00											
	11/8					5.00											
	11/9					5.50											
	11/10					0.10											
	11/11					3.50											

Billing Date	Service Date	Employee Contact	Employee Time	Component 2		Component 3				Component 6					Component 7		
				Election of Union Representative	RU	NP	NT	Costs	AI	AG	AGT	AT5	Costs	PERB	UP		
	11/14					7.20											
	11/15					6.50											
	11/16					6.30											
	11/18					7.40											
	11/21					0.20											
	11/22					0.20											
	11/28					0.20	4.00										
	11/29					7.70											
	11/30					0.10											
	11/30					4.40		\$94.60									
1/27/2006	12/5					6.80											
	12/7					5.00											
	12/12						3.00										
	12/15					7.00											
	12/19					6.70											
	12/21					4.50											
2/28/2006	1/3									0.10							
	1/3	F. DeCourt	0.40							0.40							
	1/3	F. DeCourt	0.30							0.70							
	1/9									0.10							
	1/11	F. DeCourt	0.20										0.20				
	1/13											0.40					
	1/13											0.30					
	1/20											1.00					
	1/22												0.50				
	1/24											2.00					
	1/25												0.10				
	1/27												1.20				
	1/30												0.30				
	1/31												1.20				\$53.20
	1/3					6.00											
	1/4					9.10											
	1/6					6.00											
	1/9					7.70											
	1/10					5.50											
	1/12					8.30											





Billing Date	Service Date	Employee Contact	Employee Time	Component 2	Component 3			Component 6				Component 7								
				Election of Union Representative RU	NP	NT	Costs	AI	AG	AGT	AT5	Costs	PERB	UP						
	2/22				0.10															
	2/27				6.00															
	2/28				7.60															
	2/27							\$17.36												
4/25/2006	3/1				15.80															
	3/2				4.10															
	3/3				9.40															
	3/6				5.40															
	3/7				8.30															
	3/7				0.10															
	3/8				5.10			0.10												
	3/10				0.40															
	3/13				1.00															
	3/13				0.10															
	3/14				0.10															
	3/15				5.90															
	3/16				3.10															
	3/20				8.00															
	3/21				0.10															
	3/22				4.20															
	3/24				4.50															
	3/28				0.90			4.00												
	3/29				5.20															
	3/30				0.10															
	3/31				2.00															
	3/1																			
	3/22																			
5/24/2006	4/6								\$114.89											
	4/7																			
	4/27																			
	4/3				0.10															
	4/4				3.50															
	4/4				10.40															
	4/6				0.10															
	4/7				6.00															
	4/10				2.70															
	4/12				3.00															

Billing Date	Service Date	Employee Contact	Employee Time	Component 2		Component 3				Component 6				Component 7		
				Election of Union Representative	RU	NP	NT	Costs	AI	AG	AGT	AT5	Costs	PERB	UP	
	4/17							2.50								
	4/19					5.30										
	4/21					0.10										
	4/21					4.60										
	4/24					3.20										
	4/26					3.00										
	4/27					0.30										
6/29/2006	5/1					6.90										
	5/9					8.40										
	5/10					8.70										
	5/12					7.00										
	5/16					3.30										
	5/17					4.00										
	5/22					7.60										
	5/23					4.60										
	5/24					7.70										
	5/25					4.40										
	5/26					8.70										
	5/30					0.20										
	5/31					7.80										
7/25/2006	6/14				0.10											0.10
	6/14															2.50
	6/14															
	6/14				0.10											
	6/15				0.10											
	6/15									0.10						
	6/15									7.90						
	6/15									0.10						
	6/15									0.10						
	6/20									0.10						
	6/20				0.10											
	6/26				0.10											
	6/26									0.10						
	6/27									1.00						
	6/30															\$66.10
	6/1									6.50						

Billing Date	Service Date	Employee Contact	Employee Time	Component 2		Component 3			Component 6					Component 7				
				Election of Union Representative	RU	NP	NT	Costs	AI	AG	AGT	AT5	Costs	PERB	UP			
	6/2																	
	6/5						3.70											
	6/5																	
	6/6																	
	6/7																	
	6/8																	
	6/9																	
	6/12																	
	6/12																	
	6/12																	
	6/14																	
	6/15																	
	6/16																	
	6/19																	
	6/19																	
	6/20																	
	6/20						1.00	2.70										
	6/20						0.10											
	6/21																	
	6/22																	
	6/23																	
	6/26																	
	6/26																	
	6/26						0.10											
	6/27						1.00	2.70										
	6/27						0.10											
	6/27																	
	6/29																	
	6/30																	
<b>Total Attorney Hours:</b>							<b>0.50</b>	<b>645.20</b>	<b>39.90</b>	<b>\$483.22</b>	<b>172.80</b>	<b>0.60</b>	<b>30.00</b>	<b>0.40</b>	<b>\$167.66</b>	<b>4.30</b>		

Total Staff Hours: 5.10

KEY	
NP	Negotiation Preparation
NT	At-table Negotiations

Billing Date	Service Date	Employee Contact	Employee Time	Component 2		Component 3				Component 6					Component 7		
				Election of Union Representative	RU	NP	NT	Costs	AI	AG	AGT	AT5	Costs	PERB	UP		
			AI														
			AG														
			AGT														
			AT5														
			UP														
			RU														

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Summary of District Staff Time with Attorneys

Johnson Schachter Lewis

Schedule - Johnson 2

Billing Date	Service Date	Employee Contact	Employee Time	Component 3			Component 6			Component 7	
				Negotiations			Contract Administration			PERB	
				NP	AG	AT5	AGT	UP			
8/24/2005	7/13	J. Leland	0.10							0.10	
9/28/2005	8/10	R. Martinez	0.30	0.30							
		D. Smith	0.30	0.30							
10/26/2005	9/26	R. Martinez	1.50	1.50							
		D. Smith	1.50	1.50							
	9/14	S. Guevara	0.50								0.50
2/28/2006	1/3	F. Decourten	0.30				0.30				
		F. Decourten	0.10			0.10					
	1/3	F. Decourten	0.30				0.30				
	1/11	F. Decourten	0.20				0.20				
<b>Total Staff Hours</b>				<b>5.10</b>	<b>3.60</b>	<b>0.10</b>	<b>0.20</b>	<b>0.60</b>	<b>0.60</b>	<b>0.60</b>	

STAFF:

Jean Leland	0.10										0.10
Doug Smith	1.80										
Stephanie Guevara	0.50										0.50
Ron Martinez	1.80										
Frank Decourten	0.90						0.10	0.20	0.60		

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

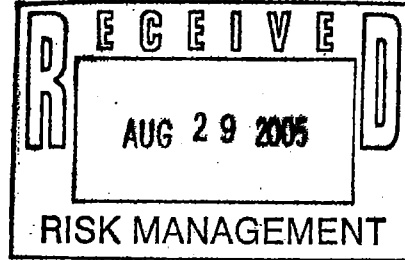
California Plaza

180 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049



August 24, 2005

PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT

JOYCE LOPES

5000 ROCKLIN RD

ROCKLIN CA 95677

## Invoice No. 41125

In Reference To: Sierra Community College District - General  
Our File No. 44964  
Purchase Order No. 041889

### INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

		<u>Hrs/Rate</u>	<u>Amount</u>
7/1/2005	KMM Further preparation of Construction Manager contract, including insurance and indemnification provisions	1.90 155.00/hr	294.50
	KMM Further research and analysis re ADA accommodations for asthma (John Monsen), including review and analysis of recent DOJ opinions/resources	1.80 155.00/hr	279.00
7/5/2005	KMM Further preparation of Construction Manager contracts, including review and analysis of insurance documents	1.30 155.00/hr	201.50
7/6/2005	GWH Telephone call to Shon Davidsen re: investigation of removal of scrap metal	0.20 155.00/hr	31.00
	GWH Exchange of e-mail with investigator Shon Davidsen re: Jesús Blanco	0.20 155.00/hr	31.00
	GWH E-mail from Ron Martínez re: Jesús Blanco notes	0.10 155.00/hr	15.50
	GWH E-mail from Tina Ludutsky-Taylor re: new assignment	0.10 155.00/hr	15.50
7/7/2005	KMM Review and analysis of additional correspondence/complaints from John Monsen re ADA accommodations, including research and analysis re required accommodations	1.60 155.00/hr	248.00
	GWH Research and analysis re: Education Code section 7000 and retiree medical benefits	4.10 155.00/hr	635.50
7/8/2005	GWH Preparation of e-mail to Lawrence Lee re: request to produce payroll records	0.10 155.00/hr	15

	<u>Hrs/Rate</u>	<u>Amount</u>
7/8/2005 GWH E-mail from Lawrence Lee re: request for payroll records	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Ron Martínez re: Education Code section 7000 and retiree medical benefits	0.10 155.00/hr	15.50
GWH Telephone conversation from investigator Shon Davidsen re: removal of construction material from dumpster	0.20 155.00/hr	31.00
7/11/2005 GWH Preparation of e-mail to Morgan Lynn re: Education Code section 72022	0.10 155.00/hr	15.50
GWH E-mail from Shon Davidsen re: Jesús Blanco	0.10 155.00/hr	15.50
GWH E-mail from Ron Martínez re: Jesús Blanco investigation	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Morgan Lynn re: residency requirements	0.10 155.00/hr	15.50
GWH Confidential research project for President Lynn	6.80 155.00/hr	1,054.00
GWH Telephone call from Jeanne Leland re: resignation of adjunct faculty	0.10 155.00/hr	15.50
GWH E-mail from Stephanie Guevara re: Heather McColgan	0.10 155.00/hr	15.50
7/12/2005 GWH Preparation of e-mail to Millie Roberts re: Allied Environmental (Weaver Hall) Contract	0.10 155.00/hr	15.50
GWH E-mail from Millie Roberts re: Allied Environmental (Weaver Hall) Contract	0.10 155.00/hr	15.50
GWH E-mail from Morgan Lynn re: residency issues	0.10 155.00/hr	15.50
GWH Analysis of proposed contract with Allied Environmental re: Weaver Hall	0.50 155.00/hr	77.50
7/13/2005 GWH Preparation of e-mail to Morgan Lynn re: residency	0.10 155.00/hr	15.50
GWH E-mail from Stephanie Guevara re: Construction Technology	0.10 155.00/hr	15.50
GWH Telephone call to Jeanne Leland re: James Maxey request for collective bargaining agreement	0.10 155.00/hr	15.50
GWH Additional research re: confidential trustee issues per Morgan Lynn	4.00 155.00/hr	620.00



		<u>Hrs/Rate</u>	<u>Amount</u>
7/14/2005	GWH Telephone conference with Stephanie Guevara's assistant re: meeting	0.10 155.00/hr	15.50
	GWH E-mail from Stephanie Guevara re: Heather McColgan's performance issues	0.10 155.00/hr	15.50
7/16/2005	GWH E-mail from Morgan Lynn re: residency issues	0.10 155.00/hr	15.50
7/18/2005	KMM Review and analysis of policy information/policy forms from Schools Insurance Group re Tahoe Truckee USD contract (Rob Koster, Construction Manager)	2.80 155.00/hr	434.00
7/20/2005	AMS Lengthy telephone conference call with Mandy Davies and Ron Martinez re: personnel issues and memo to file re: same	0.80 155.00/hr	124.00
7/21/2005	KMM Preparation of email correspondence to Millie Roberts re revisions to Tahoe Truckee USD contracts	0.40 155.00/hr	62.00
	GWH E-mail from Shon Davidsen re: Blanco investigation	0.10 155.00/hr	15.50
	AMS Research re: Adele Hamlett's Brown Act questions and preparation of responsive email correspondence	1.00 155.00/hr	155.00
	KMM Lengthy telephone conference with Doug Smith re contracts for Rob Koster (Construction Manager)/Tahoe Truckee USD	0.40 155.00/hr	62.00
	AMS Review and analysis of email correspondence from Adele Hamlett re: closed session board meeting questions, Brown Act questions	0.10 155.00/hr	15.50
7/22/2005	KMM Further preparation of contracts with Tahoe Truckee USD and Rob Koster re services of Rob Koster (Construction Manager) for Sierra	2.40 155.00/hr	372.00
7/25/2005	KMM Review and analysis of District's auto insurance policy re Rob Koster independent contractor agreement	1.30 155.00/hr	201.50
	GWH E-mail from Brian Haley re: Sierra College Management Association negotiations	0.10 155.00/hr	15.50
	KMM Review and analysis of facsimile from Sonya Koster re: automobile liability insurance	0.20 155.00/hr	31.00
	KMM Review and analysis of further facsimile from Lawrence Lee re: auto insurance policy	0.20 155.00/hr	31.00
	KMM E-mail correspondence with Doug Smith re current draft of Tahoe Truckee USD contract and independent contractor agreement, including final revisions to contracts	0.70 155.00/hr	108.50
	KMM E-mail correspondence to Ralph Johnson re revised contract for services by Rob Koster	0.30 155.00/hr	46.50
	KMM E-mail correspondence to Doug Smith and Rob Koster re draft independent contractor agreement	0.20 155.00/hr	31.00

			<u>Hrs/Rate</u>	<u>Amount</u>
7/25/2005	KMM	E-mail correspondence to Doug Smith and Ralph Johnson re revisions to contract re services for Rob Koster	0.20 155.00/hr	31.00
	KMM	E-mail correspondence from Doug Smith re revised contract with Tahoe Truckee USD and independent contractor agreement with Rob Koster	0.20 155.00/hr	31.00
	KMM	E-mail correspondence to Porter Simon (counsel for Rob Koster) re revised independent contractor agreement	0.20 155.00/hr	31.00
	KMM	E-mail correspondence to Doug Smith re revisions to Tahoe Truckee USD contract and Rob Koster independent contractor agreement	0.20 155.00/hr	31.00
	KMM	Lengthy conference call with Doug Smith and Ralph Johnson re contract for services of Rob Koster with Tahoe Truckee USD	1.20 155.00/hr	186.00
7/26/2005	GWH	E-mail from Lawrence Lee re: workers compensation premium payments	0.10 155.00/hr	15.50
	KMM	Lengthy conference call with Doug Smith and Rob Koster re independent contractor agreement (Construction Manager)	1.40 155.00/hr	217.00
	KMM	Further revisions to Tahoe Truckee USD contract and independent contractor agreement re services of Rob Koster based on conference calls	1.70 155.00/hr	263.50
	KMM	E-mail correspondence to Millie Roberts re contract for Weaver Hall, including review and analysis of contract	0.80 155.00/hr	124.00
	GWH	Research and analysis re: confidential issue	1.10 155.00/hr	170.50
7/27/2005	GWH	E-mail from Lawrence Lee re: increases in workers compensation premiums based on resignation of employees following settlement of claims	0.10 155.00/hr	15.50
	KMM	Conference call with Doug Smith and Rob Koster re independent contractor agreement (Construction Manager)	1.60 155.00/hr	248.00
	GWH	Preparation of e-mail to Lawrence Lee re: workers compensation, payment of taxes	0.10 155.00/hr	15.50
	GWH	E-mail from Ron Martinez re: pre-negotiations meeting and information to review	0.10 155.00/hr	15.50
	GWH	Preparation of e-mail to Ron Martinez and Doug Smith re: negotiations interest	0.10 155.00/hr	15.50
	GWH	E-mail from Ron Martinez re: negotiations scheduling	0.10 155.00/hr	15.50
	GWH	E-mail from Lawrence Lee re: workers compensation insurance premiums	0.10 155.00/hr	15.50
	GWH	Preparation of e-mail to Lawrence Lee re: workers compensation	0.10 155.00/hr	15.50

	<u>Hrs/Rate</u>	<u>Amount</u>
7/27/2005 GWH E-mail from Lawrence Lee re: workers compensation rates and DE-6 forms	0.10 155.00/hr	15.50
GWH E-mail from Pat Efseaff re: admission of minor international students	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Lawrence Lee re: workers compensation rates	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Pat Efseaff re: admission of international students	0.10 155.00/hr	15.50
GWH E-mail from Marcy Passuello re: DE-6 forms and workers compensation premiums	0.10 155.00/hr	15.50
GWH E-mail from Pat Efseaff re: information from Mandy Davies	0.10 155.00/hr	15.50
7/28/2005 GWH E-mail from Pat Efseaff re: HIPAA compliance	0.10 155.00/hr	15.50
GWH E-mail from Wende Rehwald re: HIPAA compliance	0.10 155.00/hr	15.50
GWH E-mail from Greg Schneider re: bid question	0.10 155.00/hr	15.50
GWH E-mail from Stephanie Guevara re: Heather McColgan's performance progress and issues	0.10 155.00/hr	15.50
GWH Research re: minor foreign exchange students and signing of District forms, including waivers, health forms, etc. and preparation of e-mail to Pat Efseaff	0.60 155.00/hr	93.00
GWH Research re: use of notarization in bid forms and preparation of e-mail to Greg Schneider	0.50 155.00/hr	77.50
GWH Preparation of e-mail to Pat Efseaff re: scheduling meetings	0.10 155.00/hr	15.50
GWH Begin research re: HIPAA compliance	0.50 155.00/hr	77.50
KMM Initial review and analysis of HIPAA compliance policy, including research and analysis re compliance requirements	1.30 155.00/hr	201.50
KMM Preparation of e-mail correspondence with Millie Roberts and Doug Smith re Tahoe Truckee USD contract	0.30 155.00/hr	46.50
For Professional Services Rendered	49.30	\$7,641.50

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

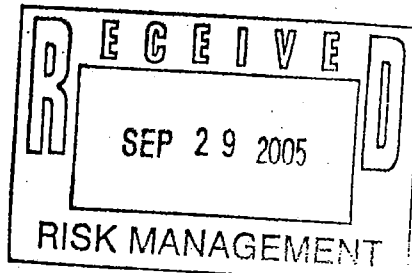
California Plaza

180 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049



September 28, 2005

PRIVILEGED & CONFIDENTIAL

SIERRA JOINT COMMUNITY COLLEGE  
ROBERT WICKSTROM/LAURENCE LEE  
5000 ROCKLIN RD  
ROCKLIN CA 95677

## Invoice No.41213

In Reference To: Sierra CCD - labor  
Our File No. 00046

### INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
8/10/2005 GWH Meeting with Ron Martinez and Doug Smith to prepare for SCMA negotiations, with travel to college	1.30 155.00/hr	201.50
GWH Preparation for and attend SCMA Negotiations at Sierra College, with return travel	4.50 155.00/hr	697.50
8/21/2005 TMP Research re: agency shop issues	2.00 155.00/hr	310.00
8/22/2005 GWH Preparation of e-mail to Doug Smith and Ron Martinez re: SCMA negotiations	0.20 155.00/hr	31.00
TMP Further research and preparation of memo re: agency shop issues	11.50 155.00/hr	1,782.50
GWH Review of Recollections from SCMA negotiating session	0.20 155.00/hr	31.00
8/23/2005 GWH Preparation for and attend SCMA labor negotiations, with round trip travel	4.30 155.00/hr	666.50
GWH Preparation of e-mail to Doug Smith and Ron Martinez re: SCMA documents	0.10 155.00/hr	15.50
8/26/2005 GWH E-mail from Judy McClymonds re: recollections and management salary schedule	0.30 155.00/hr	46.50
8/29/2005 GWH Preparation of an e-mail to Ken Akins re: SCMA negotiations	0.10 155.00/hr	15.50

*Inv 41213*

	<u>Hrs/Rate</u>	<u>Amount</u>
8/29/2005 GWH Preparation of e-mail to Doug Smith and Ron Martínez re: SCMA negotiations	<u>0.10</u> 155.00/hr	15.50
GWH Preparation of e-mail to Ken Akins re: proposed SCMA contract language	<u>0.10</u> 155.00/hr	15.50
GWH E-mail from Ron Martínez re: SCMA Negotiations - Potential General Subjects for Negotiations	<u>0.10</u> 155.00/hr	15.50
GWH Preparation of e-mail to Ron Martínez and Millie Roberts re: SCMA Negotiations - Potential General Subjects for Negotiations	<u>0.10</u> 155.00/hr	15.50
GWH Research and preparation of potential general negotiating subjects, analysis of proposed contract language from SCMA	<u>2.00</u> 155.00/hr	310.00
GWH E-mail from Ron Martínez re: San Mateo Community College District classified employees contract	<u>0.20</u> 155.00/hr	31.00
GWH Preparation for and attendance at SCMA labor negotiations, with round-trip travel from Sacramento	<u>4.00</u> 155.00/hr	620.00
GWH Research, analysis, and preparation of materials re: FLSA, exemptions, sick leave for negotiating sessions	<u>2.70</u> 155.00/hr	418.50
8/30/2005 GWH Preparation of e-mail to Ron Martínez re: San Mateo Community College District classified employees contract	<u>0.10</u> 155.00/hr	15.50
GWH Preparation of proposed contract language re: non-controversial sections	<u>5.90</u> 155.00/hr	914.50
For Professional Services Rendered	39.80	\$6,169.00
Additional Charges :		
8/10/2005 Mileage to college for bargaining session		14.18
Parking during bargaining session		1.00
8/23/2005 Mileage to Sierra College for SCMA negotiations		14.18
8/29/2005 Mileage to Sierra College for SCMA negotiations		14.18
8/31/2005 Photocopy Charges for this period		6.60
Total additional charges		<u>\$50.14</u>
TOTAL AMOUNT DUE THIS INVOICE		<u>\$6,219.14</u>
Previous balance		\$31.00
Accounts receivable transactions		
9/14/2005 Payment - Thank You. Check No. 90004908		(\$31.00)
Total payments and adjustments		(\$31.00)

*P.O. 066380*

*John  
OK to pay*

		<u>Hrs/Rate</u>	<u>Amount</u>
3/2/2005	GWH Preparation of e-mail to Lawrence Lee re: International Students Program	0.10 155.00/hr	15.50
	GWH Telephone call to Kara Franks re: Homeland Security request for information and applicability of FERPA to Homeland Security	0.10 155.00/hr	15.50
8/3/2005	GWH E-mail from Lawrence Lee re: attending board meeting	0.10 155.00/hr	15.50
	GWH Telephone call from Ron Martinez re: criminal prosecution for theft of materials from construction dumpster	0.20 155.00/hr	31.00
	GWH Analysis of Jesus Blanco case, future handling, research re: potential crimes	6.70 155.00/hr	1,038.50
8/4/2005	GWH Telephone conferences (2) with Karen Mahoney re: student accused of cheating; analysis of policies re: student grievances and cheating; telephone conference with student's attorney (Angela Cash)	1.50 155.00/hr	232.50
	GWH Preparation of e-mail to Todd Kuhnen re: Jesus Blanco letter	0.30 155.00/hr	46.50
8/8/2005	GWH Preparation of e-mail to Ron Martinez re: Jesús Blanco case	0.10 155.00/hr	15.50
	TMP Research and preparation on whether contract with an agent who lives and works in another country who engages in torts makes american company liable for them while they are conducting recruitment activities on company's behalf	1.50 ✓ 155.00/hr	232.50
	GWH Telephone call from Ron Martinez re: Board meeting	0.10 155.00/hr	15.50
	GWH E-mail from Morgan Lynn re: presidential search	0.10 155.00/hr	15.50
8/9/2005	GWH E-mail from Lawrence Lee re: employee's 'Right-to-Know' of asbestos hazards	0.10 155.00/hr	15.50
	GWH E-mail from Sonbol Aliabadi re: refund of donation	0.10 155.00/hr	15.50
	GWH Preparation for and attend Closed Session Board Mtg - Lucas v. Sierra CCD and Labor Negotiations, with travel	3.50 <del>155.00/hr</del>	542.50
	GWH Meeting with Stephanie Guevara re: various issues, including travel	3.50 155.00/hr	542.50
	GWH Preparation for meeting with Stephanie Guevaro re: Heather McColgan, including analysis of extremely large file	3.80 155.00/hr	589.00
	TMP Further research and preparation on whether contract with an agent who lives and works in another country who engages in torts makes us liable for them while they are conducting recruitment activities on our behalf	6.70 ✓ 155.00/hr	1,038.50

		<u>Hrs/Rate</u>	<u>Amount</u>
7/10/2005	GWH E-mail from Jeanne Leland re: SCMA negotiations	0.10 155.00/hr	15.50
8/11/2005	GWH Preparation of construction technology program documents	6.30 155.00/hr	976.50
	GWH Telephone conference with Stephanie Guevara's assistant re: status of minor's liability release form being prepared by our office	0.20 155.00/hr	31.00
	TMP Further research on international law and whether a foreigner has a claim under respondeat superior for torts committed by non citizens working for american company	2.20 ✓ 155.00/hr	341.00
	GWH E-mail from Ron Martínez re: draft Jesús Blanco letter, and analysis	0.30 155.00/hr	46.50
8/16/2005	KMM E-mail correspondence from Lawrence Lee re status of ADA accessibility modifications, including review and analysis of reports	3.40 ✓ 155.00/hr	527.00
	GWH E-mail from Judy McClymonds re: SCMA recollections	0.20 155.00/hr	31.00
8/17/2005	AMS Telephone conferences with President Morgan Lynn re: personnel issue; research same and recommendations regarding same	0.50 155.00/hr	77.50
8/18/2005	GWH E-mail from Lonnie Schwenk re: letter sent to companion dog owner Karen Craig	0.10 155.00/hr	15.50
	GWH Preparation of proposed correspondence to District Attorney re: Jesus Blanco	0.70 155.00/hr	108.50
	GWH Lengthy telephone call from Chief Lonnie Schwenk re: service dog incident at NCC	0.30 155.00/hr	46.50
	LJ Telephone conference with office of Stephanie Guevara re: Heather McColgan	0.20 75.00/hr	15.00
	KMM E-mail correspondence from Milton Lucius re companion dog incident	0.20 155.00/hr	31.00
	KMM E-mail correspondence from Lonnie Schwenk re Companion Dog Incident, including review and analysis of attached documents	0.80 155.00/hr	124.00
	GWH E-mail from Lonnie Schwenk re: Companion Dog Prohibition Letter	0.10 155.00/hr	15.50
	GWH E-mail from Milton Lucius re: companion dog incident	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Morgan Lynn re: Jesús Blanco letter to District Attorney's office	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Lonnie Schwenk re: resolution of companion dog issue	0.10 155.00/hr	15.50

		<u>Hrs/Rate</u>	<u>Amount</u>
8/18/2005	GWH E-mail from Lonnie Schwenk re: details of resolution of companion dog issue with owner Karen Craig	0.10 155.00/hr	15.50
	GWH E-mail from Lonnie Schwenk re: companion dog incident police report; research and analysis of same	1.20 155.00/hr	186.00
	GWH Preparation of e-mail to Morgan Lynn re: Jesús Blanco letter	0.10 155.00/hr	15.50
	GWH E-mail from Morgan Lynn re: Jesús Blanco letter	0.10 155.00/hr	15.50
	GWH E-mail from Kenneth Akins re: negotiations and analysis of three attached documents	0.20 155.00/hr	31.00
	GWH Analysis of client documents re: Heather McColgan	0.50 155.00/hr	77.50
8/19/2005	KMM Research and analysis re ADA requirements and local/state laws and regulations re companion dogs; handling of aggressive or dangerous companion dogs	3.80 155.00/hr	589.00
	GWH E-mail from Lawrence Lee re: Sierra College Stadium Project - Olympic bid bond	0.10 155.00/hr	15.50
	GWH E-mail from Kenneth Akins re: survey results	0.10 155.00/hr	15.50
8/22/2005	GWH Telephone call to Frank DeCourten re: whether interim tutor coordinator counts as load toward 60% limit for adjunct faculty	0.20 155.00/hr	31.00
	GWH E-mail from Morgan Lynn re: ability of Foundation to serve alcohol at functions	0.20 155.00/hr	31.00
	GWH E-mail from Jeanne Leland re: whether duties of tutor coordinator are loadable, analysis, reasearch and preparation of reply email	1.30 155.00/hr	201.50
8/23/2005	KMM E-mail correspondence from Rob Koster re proposed changes to Construction Manager contract, including review and analysis of proposed draft	0.80 155.00/hr	124.00
	KMM Further research and analysis re ADA/FEHA requirements re accommodation of companion/service dogs; handling of agresive or dangerous animals	2.80 155.00/hr	434.00
	GWH E-mail from Morgan Lynn re: Foundation event	0.20 155.00/hr	31.00
	GWH Research re: whether Foundation can host events on campus and allow wine to be served	4.50 155.00/hr	697.50
	GWH Preparation of extensive e-mail to Morgan Lynn re: ability of Foundation to serve alcohol at functions	0.30 155.00/hr	46.50



		<u>Hrs/Rate</u>	<u>Amount</u>
8/24/2005	GWH Telephone call from Greg Schneider re: problems with bids for print job	0.50 155.00/hr	77.50
	GWH E-mail from Adele Hamlett re: Foundation event	0.10 155.00/hr	15.50
8/25/2005	TMP Telephone call to alcoholic beverage control re: types of liquor licenses and what is the necessary procedure for community college; whether license needs to be obtained; further information regarding the event; what information is needed for license	0.40 155.00/hr	62.00
	TMP Research re: denial of tenure to Heather McColgan	2.10 155.00/hr	325.50
	TMP Research re: the proper liquor license to obtain for community college campus fundraiser	1.70 155.00/hr	263.50
	GWH Telephone call to Stephanie Guevara re: McColgan document project	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Adele Hamlett re: Foundation event	0.20 155.00/hr	31.00
	GWH Research re: proper procedure for obtaining liquor license for Foundation function	0.20 155.00/hr	31.00
	GWH Telephone call to Ron Martinez re: Jesus Blanco	0.20 155.00/hr	31.00
	GWH Preparation of email to Adele Hamlett re: obtaining liquor license	0.20 155.00/hr	31.00
8/26/2005	GWH E-mail from Mandy Davies re: various items	0.10 155.00/hr	15.50
	GWH E-mail from Joyce Lopes re: Agency Fee Implementation	0.10 155.00/hr	15.50
	KMM E-mail correspondence from Millie Roberts re status/approval of contracts with Rob Koster for Construction Manager position; scheduling of Board approval	0.10 155.00/hr	15.50
	GWH Telephone call to Greg Schneider re: printing bid protest	0.40 155.00/hr	62.00
	GWH Preparation of summary and analysis of extensive documents re: Heather McColgan	2.00 155.00/hr	310.00
	GWH Telephone call to Greg Schneider update on bid issue	0.20 155.00/hr	31.00
	GWH Preparation of e-mail to Greg Schneider re: printing bid protest	0.10 155.00/hr	15.50

	<u>Hrs/Rate</u>	<u>Amount</u>
8/26/2005 GWH E-mail from Greg Schneider re: bid packet for printing bid	0.10 155.00/hr	15.50
GWH Telephone call from Adelle Hamlett re: printing bid	0.10 155.00/hr	15.50
GWH Preparation of draft correspondence to contractor re: rejection of printing bid	0.30 155.00/hr	46.50
GWH Lengthy telephone conference with Greg Schneider re: bid protest	0.30 155.00/hr	46.50
TMP Research re: faculty collective bargaining agreement procedures for denial of tenure, education code procedures	0.90 155.00/hr	139.50
TMP Further research and analysis of client documents re: Heather McColgan in preparation for meeting with Stephanie Guevaro	3.50 155.00/hr	542.50
GWH E-mail from Greg Schneider re: bid protest for printing job	0.10 155.00/hr	15.50
8/29/2005 GWH E-mail from Adele Hamlett re: Foundation fund-raising event	0.10 155.00/hr	15.50
KMM Further research and analysis re requirements for licensing companion dogs; required accommodation under the ADA and FEHA	2.80 155.00/hr	434.00
GWH Telephone call from Jeanne Leland re: time off for employee serving on grand jury	0.20 155.00/hr	31.00
GWH Preparation of e-mail to Doug Smith and Ron Martínez re: SCMA negotiations	0.20 155.00/hr	31.00
GWH E-mail from Jeanne Leland re: SB 794	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Ron Martínez re: Jesús Blanco status of dismissal	0.10 155.00/hr	15.50
GWH Telephone call from District Attorney Todd Kuhnen re: Jesus Blanco	0.10 155.00/hr	15.50
GWH Telephone call from Adele Hamlett re: printing bid protest	0.20 155.00/hr	31.00
8/30/2005 GWH Preparation of e-mail to Greg Schneider re: print bid award agenda item	0.10 155.00/hr	15.50
TMP Research re: whether employee can compel disclosure of private investigator report requested by District; Public Records Act, Labor Code	1.60 155.00/hr	248.00
GWH E-mail from Greg Schneider re: print bid award agenda and analysis of proposed language	0.40 155.00/hr	62.00

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

California Plaza

1000 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

October 26, 2005

PRIVILEGED & CONFIDENTIAL

SIERRA JOINT COMMUNITY COLLEGE  
ROBERT WICKSTROM/LAURENCE LEE  
5000 ROCKLIN RD  
ROCKLIN CA 95677

## Invoice No.41251

In Reference To: Sierra CCD - labor  
Our File No. 00046

### INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
9/2/2005 GWH Telephone call to Karen Walters-Dunlap re: ADA requirements	0.20 155.00/hr	31.00
GWH Research and preparation of opinion memo re: ability of union to negotiate directly with Board of Trustees	<del>9.40</del> 155.00/hr	1,457.00
9/6/2005 GWH Additional research and preparation of opinion email re: union contacts with individual Board members re: negotiations	<del>1.10</del> 155.00/hr	170.50
GWH Preparation of opinion email to Ronald Martinez re: union direct dealing with trustees, research and analysis	<del>2.50</del> 155.00/hr	387.50
9/8/2005 GWH E-mail from Ronald Martinez re: Agency Fee Implementation	<del>0.10</del> 155.00/hr	15.50
GWH E-mail from Ronald Martinez re: Agency Fee Implementation and research re: same	<del>1.90</del> 155.00/hr	294.50
9/19/2005 GWH Preparation for and attend SCMA Labor Negotiations, with travel	<del>3.80</del> 155.00/hr	589.00
9/21/2005 GWH Research re: Government Code limits on buyout of employee contract	<del>0.10</del> 155.00/hr	15.50
TMP Research re: cash settlement formula on remainder of an employee contract for SCMA negotiations	<del>0.50</del> 155.00/hr	77.50
9/22/2005 GWH E-mail from Millie Roberts re: recollections from prior bargaining session	<del>0.10</del> 155.00/hr	15.50

	Hrs/Rate	Amount
9/23/2005 GWH Preparation of e-mail to Kenneth Akins re: SCMA Negotiations, Government Code section 53260, and mandatory by out clause	0.30 155.00/hr	46.50
GWH Preparation of contract language re: non-controversial contract clauses for SCMA agreement	0.70 155.00/hr	108.50
GWH Preparation of e-mail to Ken Akins re: SCMA negotiations and District sexual harassment policy	0.10 155.00/hr	15.50
GWH E-mail from Kenneth Akins re: SCMA Negotiations	0.10 155.00/hr	15.50
GWH E-mail from Ron Martinez re: SCMA Negotiations - Proposed CBA Language	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Kenneth Akins containing 7 proposed SCMA contract provisions	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Doug Smith and Ronald Martinez re: proposed SCFA contract provision re: safety committee	0.10 155.00/hr	15.50
GWH E-mail from Ronald Martinez re: Safety Committee and SCMA contract negotiations	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Ronald Martinez re: SCMA negotiations and preparation of proposed collective bargaining agreement language	0.10 155.00/hr	15.50
GWH E-mail from Doug Smith re: proposed SCMA contract language	0.10 155.00/hr	15.50
GWH E-mail from Kenneth Akins re: SCMA negotiations	0.10 155.00/hr	15.50
9/26/2005 GWH Meeting with Ron Martinez and Doug Smith re: preparation for SCMA negotiations	1.50 155.00/hr	232.50
GWH Preparation for and attend SCMA Labor Negotiations, with travel	3.80 155.00/hr	589.00
9/27/2005 GWH Preparation of e-mail to Ron Martinez re: conversation with John Bukey re: agency shop	0.10 155.00/hr	15.50
GWH Lengthy telephone conversation with John Bukey re: agency shop issues	0.20 155.00/hr	31.00
GWH Telephone call to John Bukey re: agency shop	0.10 155.00/hr	15.50
9/29/2005 GWH E-mail from Millie Roberts re: recollections for previous bargaining session	0.10 155.00/hr	15.50
For Professional Services Rendered	27.40	\$4,247.00

Additional Charges :

	<u>Amount</u>
8/23/2005 Mileage to SCMA negotiations at college	18.92
8/29/2005 Mileage to SCMA negotiations at college	18.92
8/31/2005 WestLaw research charges for August 2005	63.83
9/19/2005 Mileage to SCMA negotiations at college	18.92
9/26/2005 Mileage to SCMA negotiations at college	18.92
9/30/2005 Photocopy Charges for this period	0.40
Total additional charges	<u>\$139.91</u>
TOTAL AMOUNT DUE THIS INVOICE	\$4,386.91
Previous balance	\$6,219.14
Accounts receivable transactions	
10/21/2005 Payment - Thank You. Check No. 90010219	(\$6,219.14)
Total payments and adjustments	(\$6,219.14)
Balance due	<u><u>\$4,386.91</u></u>

**ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT**

Timekeeper Summary

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
George W. Holt	26.90	155.00	\$4,169.50
Tricia M. Pride	0.50	155.00	\$77.50

P.O  
060380

*[Signature]*  
OK to pay

		<u>Hrs/Rate</u>	<u>Amount</u>
9/4/2005	TMP Analysis of extension file on Heather McColgan in preparation for meeting with Stephanie Guevara	<del>5.60</del> 155.00/hr	868.00
9/6/2005	GWH Preparation of email to Greg Schneider re: bid protest	0.10 155.00/hr	15.50
	GWH Exchange of numerous email with Stephanie Guevara re: numerous subjects	0.90 155.00/hr	139.50
	KMM Further revisions to Construction Manager agreement (Rob Koster)	1.30 155.00/hr	201.50
	GWH E-mail from Linda Nash re: rescheduling meeting	0.10 155.00/hr	15.50
	GWH Research and analysis re: fees for facilities, and telephone conference with Stephanie Guevara	0.50 155.00/hr	77.50
9/7/2005	GWH E-mail from Karen Walters-Dunlap re: update on Karen Zaiger	0.10 155.00/hr	15.50
	KMM Research and analysis re question of whether title for position of President/Superintendent is mandatory or whether CEO can be used as title, including review of relevant Education Code provisions, Title V, case law	0.80 155.00/hr	124.00
9/8/2005	KMM E-mail correspondence (2) with Doug Smith re requested revisions to Construction Manager Agreement (Rob Koster)	0.20 155.00/hr	31.00
	KMM Review and analysis of requested changes to Construction Manager Agreement (Rob Koster), including revision of indemnification and insurance language	0.70 155.00/hr	108.50
	KMM E-mail correspondence to Rob Koster re revisions to Construction Manager Agreement	0.10 155.00/hr	15.50
	KMM E-mail correspondence to Doug Smith re Rob Koster's requested revisions to Construction Manager Agreement	0.10 155.00/hr	15.50
	KMM Telephone call to Jeanne Leland re question of President/Superintendent title	0.10 155.00/hr	15.50
	KMM Lengthy telephone conference with Doug Smith re requested changes to Rob Koster agreement; discussion of proposed substitute language	0.50 155.00/hr	77.50
9/9/2005	GWH E-mail from Greg Schneider re: Math & Tech Building Bid and analysis of attached document	0.50 155.00/hr	77.50
9/12/2005	GWH Research re: effect of District serving alcohol at functions on status as tax exempt organization and preparation of e-mail to Adele Hamlett	0.80 155.00/hr	124.00
	GWH E-mail from Adele Hamlett re: ability of District to serve alcohol at functions and potential effects on tax exempt status	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Greg Schneider re: request to withdraw bid for acoustical ceilings by George Family Enterprises	0.10 155.00/hr	15.50

		<u>Hrs/Rate</u>	<u>Amount</u>
9/12/2005	GWH Analysis of Delta Web notice of bid protest, research, preparation of proposed notice, rejecting bid protest, preparation of e-mail to Greg Schneider	2.30 155.00/hr	356.50
	GWH E-mail from Adele Hamlett re: serving alcohol at District function	0.10 155.00/hr	15.50
	GWH E-mail from Greg Schneider re: Sierra Community College Request to Withdraw bid for Acoustical Ceilings by George Family Enterprises and attached correspondence	0.30 155.00/hr	46.50
9/14/2005	GWH E-mail from Adele Hamlett re: redistricting question	0.30 155.00/hr	46.50
	GWH Preparation of e-mail to Pat Vitale re: District claims	0.10 155.00/hr	15.50
	TMP Preparation for and meeting with Stephanie Guevara re: McColgan document review; strategy re: denial of tenure; travel	<del>5.00</del> 155.00/hr	775.00
9/15/2005	GWH Preparation of e-mail to Adele Hamlett re: trustee area redistricting	0.10 155.00/hr	15.50
	GWH Research and begin preparation of opinion letter re: trustee area redistricting	3.70 155.00/hr	573.50
6/2005	GWH Preparation of e-mail to Ron Martínez re: Jesús Blanco	0.10 155.00/hr	15.50
	GWH Further research and preparation of opinion letter re: trustee area redistricting	5.00 155.00/hr	775.00
9/17/2005	GWH E-mail from Ronald Martinez re: Jesus Blanco criminal case status	0.10 155.00/hr	15.50
9/19/2005	KMM Review and analysis of recent ADA publication re guide dogs; research re accommodation and exceptions for dangerous animals	2.90 155.00/hr	449.50
9/20/2005	KMM Further research and analysis re ADA/DOJ policy on guide dogs; research re accommodation and exceptions for dangerous animals	1.10 155.00/hr	170.50
	KMM Preparation of further revisions to Construction Manager agreement (Rob Koster) per email from Koster's attorney, including research re reciprocal indemnity provisions	1.80 155.00/hr	279.00
	KMM E-mail correspondence from Rob Koster re Construction Manager Agreement	0.10 155.00/hr	15.50
9/21/2005	GWH Analysis of proposed Karen Zaiger evaluation	0.50 155.00/hr	77.50
	GWH Analysis of proposed Zaiger letter and receipt of email from Karen Walters-Dunlap	0.50 155.00/hr	77.50

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

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Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

October 27, 2005

PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT

RON MARTINEZ

5000 ROCKLIN ROAD

ROCKLIN CA 95677

Invoice No.41271

In Reference To: James C. Maxey v. Sierra Joint CCD  
Our File: 04036/GWH

*[Handwritten signature]* 10/11/05

INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
9/9/2005 KMM Review and analysis of request for leave to file late claim, including research and analysis re case law cited in support thereof	0.80 155.00/hr	124.00
9/15/2005 KMM Research and analysis re leave to file late claim; response	0.60 155.00/hr	93.00
For Professional Services Rendered	1.40	\$217.00
Previous balance		\$281.46
Accounts receivable transactions		
10/25/2005 Payment - Thank You. Check No. 90010464		(\$281.46)
Total payments and adjustments		(\$281.46)
Balance due		<u>\$217.00</u>

**ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT**

### Timekeeper Summary

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Kellie M. Murphy	1.40	155.00	\$217.00

*P.O. 060380*

889

*[Handwritten signature]*  
OK to pay



# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

California Plaza

80 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

November 21, 2005



PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT

RON MARTINEZ

5000 ROCKLIN ROAD

ROCKLIN CA 95677

Invoice No. 41330

In Reference To: James C. Maxey v. Sierra Joint CCD  
Our File: 04036/GWH

INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

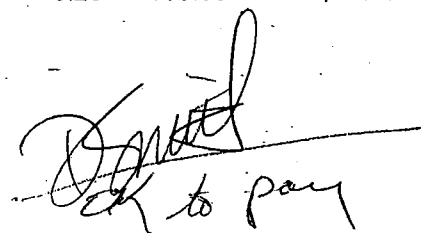
	<u>Hrs/Rate</u>	<u>Amount</u>
10/17/2005 GWH Telephone call to Maxey's attorney re: change of venue for filing civil complaint	0.20 155.00/hr	31.00
For Professional Services Rendered	0.20	\$31.00
Previous balance		\$217.00
Accounts receivable transactions		
11/14/2005 Payment - Thank You. Check No. 90011544		(\$217.00)
Total payments and adjustments		(\$217.00)
Balance due		<u>\$31.00</u>

ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT

Timekeeper Summary

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
George W. Holt	0.20	155.00	\$31.00

PO: 060380



		<u>Hrs/Rate</u>	<u>Amount</u>
09/11/2005	TMP Lengthy telephone call to contact at Chancellor's office re: costs and fees associated with trustee area redistricting; petitions; election issues; campus centers v. approved centers for the purpose of Ed. Code sections 5019.5 and 5017	1.10 155.00/hr	170.50
10/12/2005	GWH Review of proposed letter re: student abroad issue and preparation of e-mail to Pamela Johnson	0.50 155.00/hr	77.50
	TMP Preparation of summaries re: evaluation of non-tenured faculty; quarterly reviews; tenure review process; in anticipation of not granting tenure to H. McColgan	3.20 155.00/hr	496.00
	KMM Further research and analysis re accommodations for guide/assistance animals, including review and analysis of opinions and guidelines from Department of Justice	1.90 155.00/hr	294.50
	GWH Preparation for sexual harassment training	0.30 155.00/hr	46.50
10/13/2005	GWH Additional research re: trustee area redistricting	2.50 155.00/hr	387.50
	GWH E-mail from Morgan Lynn re: NCC Provost	0.20 155.00/hr	31.00
10/14/2005	GWH Preparation of e-mail to Jeanne Leland re: scheduling sexual harassment training	0.20 155.00/hr	31.00
	GWH E-mail from Ronald Martínez re: confidential draft letter of reprimand	0.20 155.00/hr	31.00
	KMM Research and analysis re filing of workplace violence temporary restraining order by employer; necessity of filing individual restraining order; scope of protection; burden required for hearing (Davies & Hallberg)	3.30 155.00/hr	511.50
	GWH E-mail from Adele Hamlett re: redistricting	0.20 155.00/hr	31.00
	GWH E-mail from Gail Modder re: release of student social security numbers to collection agency	0.20 155.00/hr	31.00
	GWH Telephone call to Ron Martinez re: restraining order	0.20 155.00/hr	31.00
	GWH Telephone call to Dr. Ron Martinez re: confidential letter of reprimand	0.20 155.00/hr	31.00
10/15/2005	GWH E-mail from Jeanne Leland re: sexual harassment training	0.20 155.00/hr	31.00
10/17/2005	GWH Preparation of e-mail to Jeanne Leland re: Sierra College sexual harassment training	0.20 155.00/hr	31.00
	GWH Exchange of telephone calls with Lonnie Schwenk re: institutional restraining order	0.30 155.00/hr	46.50

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

California Plaza

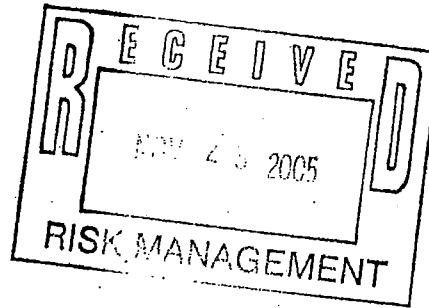
80 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

November 21, 2005



PRIVILEGED & CONFIDENTIAL

SIERRA JOINT COMMUNITY COLLEGE

LAURENCE LEE

5000 ROCKLIN RD

ROCKLIN CA 95677

## Invoice No.41329

In Reference To: Sierra CCD - labor  
Our File No. 00046

### INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
10/7/2005 GWH Preparation of proposed contract language	5.00 155.00/hr	775.00
10/10/2005 GWH E-mail from Ronald Martínez re: classified article	0.20 155.00/hr	31.00
GWH SCMA Negotiations, with travel	3.80 155.00/hr	589.00
10/11/2005 GWH Preparation of proposed contract language	5.00 155.00/hr	775.00
10/12/2005 GWH Preparation of proposed contract language	6.50 155.00/hr	1,007.50
10/13/2005 GWH Further preparation proposed contract language	7.00 155.00/hr	1,085.00
10/14/2005 GWH Preparation of proposed contract language	4.50 155.00/hr	697.50
10/17/2005 GWH Review of SCMA Negotiation Recollections	0.30 155.00/hr	46.50
10/18/2005 GWH Preparation of proposed contract language	6.50 155.00/hr	1,007.50
10/19/2005 GWH Preparation of proposed contract language	5.00 155.00/hr	775.00

	Hrs/Rate	Amount
10/20/2005 GWH Preparation of proposed contract language	4.00 155.00/hr	620.00
GWH Research and preparation of e-mail to Ronald Martínez re: SCFA intellectual property rights	2.10 155.00/hr	325.50
10/21/2005 GWH Preparation of proposed contract language	7.00 155.00/hr	1,085.00
10/24/2005 GWH SCMA Negotiations, with travel	3.80 155.00/hr	589.00
10/25/2005 GWH Preparation of proposed contract language	5.00 155.00/hr	775.00
GWH E-mail from Millie Roberts re: charts	0.20 155.00/hr	31.00
10/26/2005 GWH Telephone conference with Bill Karnes re: faculty review	0.20 155.00/hr	31.00
GWH E-mail from Millie Roberts and review of SCMA Recollections for October 24, 2005 bargaining session	0.50 155.00/hr	77.50
10/27/2005 GWH Preparation of proposed contract language	5.00 155.00/hr	775.00
10/28/2005 GWH Preparation of proposed contract language	6.00 155.00/hr	930.00
10/31/2005 GWH SCMA/Teamsters Negotiations, with travel	2.80 155.00/hr	434.00
For Professional Services Rendered	80.40	\$12,462.00
Additional Charges :		
10/1/2005 WestLaw research charges for September 2005		66.32
Total additional charges		\$66.32
<b>TOTAL AMOUNT DUE THIS INVOICE</b>		<b>\$12,528.32</b>
Previous balance		\$4,386.91
Accounts receivable transactions		
11/14/2005 Payment - Thank You. Check No. 90011544		(\$4,386.91)
Total payments and adjustments		(\$4,386.91)
Balance due		<b>\$12,528.32</b>

PC. 060380

*[Handwritten signatures and notes]*  
 11-24-05

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

California Plaza

80 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

December 21, 2005

PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT

JOYCE LOPES

5000 ROCKLIN RD

ROCKLIN CA 95677

## Invoice No.41421

In Reference To: Sierra Community College District - General  
Our File No. 44964  
Purchase Order No. 041889

### INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
11/1/2005 GWH Research and telephone call to Ron Martinez re: limited term employees	<u>1.10</u> 155.00/hr	170.50
KMM Telephone conference with Shirley Martindale re Project Inspector agreement; analysis of indemnification clause	0.20 155.00/hr	31.00
GWH Research and preparation of extensive e-mail to Ron Martinez re: 60% issue research	1.50 155.00/hr	232.50
GWH E-mail from Judy McClymonds re: 60% issue	0.10 155.00/hr	15.50
KMM Attendance at hearing on petition for restraining order against Jeremy Calderon (re employees/administrators Mandy Davies and Kaylene Hallberg), including pre-hearing meeting with Davies and Hallberg (includes travel time)	4.80 155.00/hr	744.00
11/2/2005 GWH Preparation of correspondence to Ron Martinez re: reasonable accommodation of Carlotta Delgado	0.20 155.00/hr	31.00
GWH Analysis and research re: reasonable accommodation issue from Ronald Martinez, including preparation of draft correspondence, medical report form, and employee release form	2.90 155.00/hr	449.50
GWH E-mail from Ronald Martinez re: reasonable accommodation issue	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Ron Martinez re: reasonable accommodation of job-related stress claims	0.10 155.00/hr	15.50

		<u>Hrs/Rate</u>	<u>Amount</u>
11/2/2005	KMM Preparation of restraining orders following hearing (Davies & Hallberg)	0.50 155.00/hr	77.50
	KMM E-mail correspondence to Shirley Martindale re insurance/indemnification issues on Project Inspector contract	0.20 155.00/hr	31.00
	KMM E-mail correspondence from Shirley Martindale re insurance/indemnification issues on Project Inspector Contract	0.10 155.00/hr	15.50
11/4/2005	AMS Telephone conference with Ron Martinez re personnel matter involving unlawful discrimination complaint	0.40 155.00/hr	62.00
	GWH Review of email correspondence from Ron Martinez re: military orders	0.10 155.00/hr	15.50
11/7/2005	GWH Review of email correspondence from Sonbol Aliabidi re: refund of donation	0.10 155.00/hr	15.50
11/8/2005	KMM Research and analysis re ADA accommodation issue re parking; effect of qualification as disabled under worker's compensation laws; analysis of recent case law re same	3.60 155.00/hr	558.00
	KMM Telephone conference with Ron Martinez re accommodations for stress-related disabilities	0.30 155.00/hr	46.50
11/10/2005	GWH Research re: use of alcohol on community college campus	1.10 155.00/hr	170.50
	GWH Begin analysis of proposed psych services contract	3.00 155.00/hr	465.00
	GWH E-mail from Mandy Davies re: psych services contract	0.20 155.00/hr	31.00
11/11/2005	GWH E-mail from Mandy Davies re: psych services contract	0.10 155.00/hr	15.50
	KMM Preparation of (2) cost memorandum and (2) orders after hearing on petition of injunction	0.60 155.00/hr	93.00
11/14/2005	GWH Preparation of e-mail to Mandy Davies re: psych services contract	0.10 155.00/hr	15.50
	GWH Further analysis of psych services contract	1.00 155.00/hr	155.00
	TMP Email to Stephanie Guevara re: document review	0.10 155.00/hr	15.50
	KMM Further research and analysis re ADA accommodation issue re parking; effect of qualification as disabled under worker's compensation laws	2.60 155.00/hr	403.00
11/15/2005	GWH E-mail from Bill Tsuji re: study abroad release form	0.10 155.00/hr	15.50

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

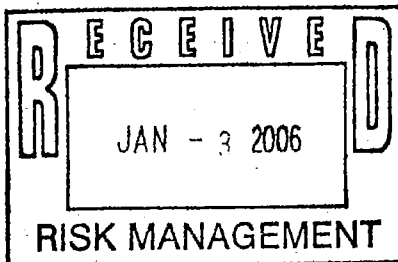
California Plaza

180 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049



December 21, 2005

PRIVILEGED & CONFIDENTIAL

SIERRA JOINT COMMUNITY COLLEGE

LAURENCE LEE

5000 ROCKLIN RD

ROCKLIN CA 95677

Invoice No.41409

In Reference To: Sierra CCD - labor  
Our File No. 00046

Handwritten initials "LL" inside a hand-drawn circle.

INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
11/1/2005 GWH E-mail from Ronald Martinez re: classified categorical positions	<del>0.10</del> 155.00/hr	15.50
GWH Research and preparation of e-mail to Ron Martinez re: analysis of intellectual property rights proposal (faculty negotiations)	<del>1.10</del> 155.00/hr.	170.50
GWH Preparation of SCMA contract language, including research	<del>3.20</del> 155.00/hr	496.00
11/2/2005 GWH Research re: classified categorical employees for classified negotiations	<del>1.20</del> 155.00/hr	186.00
GWH Preparation of e-mail to Ron Martinez re: categorically funded positions for classified negotiations	<del>0.10</del> 155.00/hr	15.50
11/3/2005 GWH Further preparation of SCMA contract provisions	<del>6.00</del> 155.00/hr	930.00
11/7/2005 GWH Further research and preparation of proposed SCMA contract provisions	<del>3.00</del> 155.00/hr	465.00
11/8/2005 GWH Research and preparation of draft SCMA contract provisions	<del>5.00</del> 155.00/hr	775.00
11/9/2005 GWH Further preparation and research re: SCMA contract provisions	<del>5.50</del> 155.00/hr	852.50
11/10/2005 GWH E-mail from Millie Roberts re: SCMA Recollections	<del>0.10</del> 155.00/hr	15.50

	<u>Hrs/Rate</u>	<u>Amount</u>
11/11/2005 GWH Further preparation of SCMA contract provisions	<del>3.50</del> 155.00/hr	542.50
11/14/2005 GWH Further preparation of SCMA contract provisions	<del>7.20</del> 155.00/hr	1,116.00
11/15/2005 GWH Further preparation of SCMA contract provisions	<del>6.50</del> 155.00/hr	1,007.50
11/16/2005 GWH Further preparation of SCMA contract provisions	<del>6.00</del> 155.00/hr	930.00
GWH Preparation of e-mail to Ron Martinez and Doug Smith re: SCMA negotiating session	<del>0.10</del> 155.00/hr	15.50
GWH E-mail from Doug Smith re: SCMA negotiating session	<del>0.20</del> 155.00/hr	31.00
11/18/2005 GWH E-mail from Millie Roberts re: future negotiations	<del>0.10</del> 155.00/hr	15.50
GWH Further preparation of SCMA contract clauses	<del>7.30</del> 155.00/hr	1,131.50
11/21/2005 GWH E-mail from Judy McClymonds re: SCMA negotiating meeting scheduling	<del>0.10</del> 155.00/hr	15.50
GWH Preparation for upcoming negotiating sessions	<del>0.10</del> 155.00/hr	15.50
11/22/2005 GWH E-mail from Millie Roberts re: recollections from previous SCMA negotiations	<del>0.10</del> 155.00/hr	15.50
GWH E-mail from Millie Roberts re: upcoming SCMA negotiations	<del>0.10</del> 155.00/hr	15.50
11/28/2005 GWH E-mail from Lonnie Schwenk re: attendance at SCMA negotiations	<del>0.10</del> 155.00/hr	15.50
GWH Preparation of e-mail to Millie Roberts re: SCMA/Teamsters WWW	<del>0.10</del> 155.00/hr	15.50
GWH SCBA Negotiations, with round trip travel from Sacramento	<del>4.00</del> 155.00/hr	620.00
11/29/2005 GWH E-mail from Diane McKnight re: proposed management time sheet for SCMA negotiations	<del>0.10</del> 155.00/hr	15.50
GWH Further preparation of SCMA contract clauses	<del>7.80</del> 155.00/hr	1,178.00
11/30/2005 GWH E-mail from Judy McClymonds re: Recollections for recent SCMA negotiations	<del>0.10</del> 155.00/hr	15.50



	<u>Hrs/Rate</u>	<u>Amount</u>
11/30/2005 GWH E-mail from Robin Horne	0.10 155.00/hr	15.50
GWH Further preparation of SCMA contract clauses	4.30 155.00/hr	666.50
For Professional Services Rendered	73.00	\$11,315.00
Additional Charges :		
10/10/2005 Mileage to SCMA Negotiations		18.92
10/24/2005 Mileage to SCMA Negotiations		18.92
11/9/2005 Mileage to SCMA Negotiations		18.92
11/16/2005 Mileage to SCMA Negotiations		18.92
11/28/2005 Mileage to SCMA Negotiations		18.92
Total additional charges		\$94.60
<b>TOTAL AMOUNT DUE THIS INVOICE</b>		<b>\$11,409.60</b>
Previous balance		\$12,528.32
Balance due		<b>\$23,937.92</b>

**ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT**

Timekeeper Summary			
<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
George W. Holt	73.00	155.00	\$11,315.00

*P.O. 060380*

*[Signature]*  
*ck to pay*

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

California Plaza

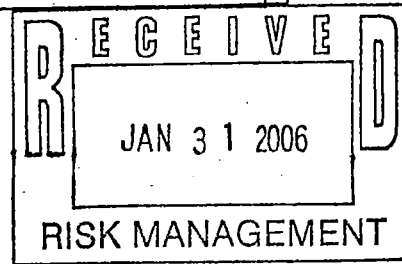
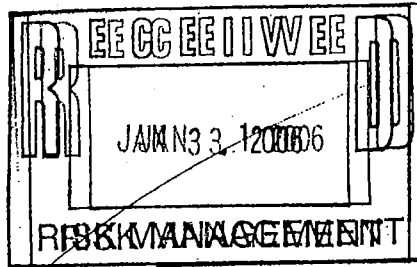
80 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

January 27, 2006



PRIVILEGED & CONFIDENTIAL

SIERRA JOINT COMMUNITY COLLEGE

LAURENCE LEE

5000 ROCKLIN RD

ROCKLIN CA 95677

Invoice No. 41540

In Reference To: Sierra CCD - labor.  
Our File No. 00046

## INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	Hrs/Rate	Amount
12/5/2005 GWH Preparation of SCMA contract language	6.80 155.00/hr	1,054.00
12/7/2005 GWH Preparation of SCMA contract language	5.00 155.00/hr	775.00
12/12/2005 GWH SCBA Negotiations	3.00 155.00/hr	465.00
12/15/2005 GWH Further preparation of SCMA contract language	7.00 155.00/hr	1,085.00
12/19/2005 GWH Preparation of SCMA contract language	6.70 155.00/hr	1,038.50
12/21/2005 GWH Further preparation of SCMA contract language	4.50 155.00/hr	697.50
For Professional Services Rendered	33.00	\$5,115.00
Previous balance		\$23,937.92
Accounts receivable transactions		
1/23/2006 Payment from Sierra Community College District. Check No. 90016450		(\$11,409.60)
1/23/2006 Payment from Sierra Community College District. Check No. 90016450		(\$12,528.32)
Total payments and adjustments		(\$23,937.92)

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

California Plaza

1000 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

February 28, 2006

PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT

JOYCE LOPES

5000 ROCKLIN RD

ROCKLIN CA 95677

## Invoice No.41629

In Reference To: Sierra Community College District - General  
Our File No. 44964  
Purchase Order No. 041889

### INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
1/3/2006 GWH E-mail from Neal Allbee re: Lucius Milton	<del>0.10</del> 155.00/hr	15.50
GWH Preparation of e-mail to Neal Allbee re: NCC DSPS Counselor - Draft Response, review, analysis and preparation of revisions	1.60 155.00/hr	248.00
GWH Preparation of research e-mail to Joyce Lopes re: assignment clause to NCC food services contract	1.70 155.00/hr	263.50
GWH Preparation of e-mail to attorney Maggie Geddes re: Heather McColgan	<del>0.10</del> 155.00/hr	15.50
GWH E-mail from Joyce Lopes re: escrow account	0.10 155.00/hr	15.50
GWH Preparation for and conference call with Frank DeCourten et al re: Heather McColgan -	<del>0.80</del> 155.00/hr	124.00
GWH Telephone call from Frank DeCourten re: Heather McColgan	<del>0.10</del> 155.00/hr	15.50
GWH E-mail from Neal Allbee re: NCC DSPS Counselor	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Neal Allbee and analysis of NCC DSPS Counselor - Draft Response	0.50 155.00/hr	77.50
GWH E-mail from Ron Martinez re: NCC DSPS Counselor - Draft Response	0.10 155.00/hr	15.50

	<u>Hrs/Rate</u>	<u>Amount</u>
1/3/2006 GWH E-mail from Stephanie Guevara re: construction question	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Margret Geddes re: resolution of Heather McColgan situation	0.10 155.00/hr	15.50
GWH Research re: ability of District to assign remainder of NCC food service contract without public bid, and preparation of e-mail to Joyce Lopes	1.30 155.00/hr	201.50
GWH Telephone call from Frank DeCourten re: Heather McColgan	0.10 155.00/hr	15.50
GWH E-mail from Joyce Lopes re: possible assignment of NCC food services contract	0.10 155.00/hr	15.50
GWH Telephone call to Mr. Frank DeCourten re: Heather McColgan and web site, testing	0.10 155.00/hr	15.50
GWH Telephone call to attorney Margaret Geddes re: Heather McColgan	0.10 155.00/hr	15.50
GWH Telephone call from Margaret Geddes re: Heather McColgan staying at home	0.10 155.00/hr	15.50
GWH Telephone call to Frank DeCourten re: information from telephone call with Margaret Geddes re: Heather McColgan	0.10 155.00/hr	15.50
GWH Telephone call from Frank DeCourten re: conference call re: Heather McColgan	0.10 155.00/hr	15.50
1/4/2006 GWH E-mail from Lawrence Lee re: Steven Monas claim, analysis of claim and telephone conference	1.10 155.00/hr	170.50
GWH E-mail from Stephanie Guevara re: construction class status form, analysis of form, and telephone conference	0.60 155.00/hr	93.00
AMS Telephone call to Tina Ludutsky-Taylor's attorney	0.10 155.00/hr	15.50
AMS Telephone call from Tina Ludutsky-Taylor's attorney	0.10 155.00/hr	15.50
AMS Review of agreement re: information requested	0.10 155.00/hr	15.50
AMS Preparation of email correspondence to Ron Martinez re: status	0.10 155.00/hr	15.50
1/9/2006 AMS Telephone conference with Ron Martinez and Doug Smith re: status of discussions with Tina Ludutsky-Taylor	0.20 155.00/hr	31.00
GWH E-mail from Ron Martinez re: Milton Lucius	0.10 155.00/hr	15.50

		<u>Hrs/Rate</u>	<u>Amount</u>
1/9/2006	AMS Preparation of email correspondence to Ron Martinez re: Tina Ludutsky-Taylor	0.20 155.00/hr	31.00
	AMS Lengthy voice mail message to Ron Martinez	0.10 155.00/hr	15.50
	AMS Initial review and analysis of email correspondence from Susan Sheridan re: Tina Ludutsky-Taylor, proposed revisions to agreement, letter of recommendation, etc., preparation of email correspondence to Superintendent and VP Human Resources re: same	1.20 155.00/hr	186.00
	AMS Telephone conference with attorney Susan Sheridan	0.40 155.00/hr	62.00
	AMS Telephone call to Susan Sheridan re: Tina Ludutsky-Taylor	0.10 155.00/hr	15.50
	AMS Telephone call from Ron Martinez	0.10 155.00/hr	15.50
1/10/2006	AMS Review of further email correspondence from Morgan Lynn	0.10 155.00/hr	15.50
	AMS Further review and analysis of voluminous letter of recommendation and other attachments from Tina Ludutsky-Taylor's attorney and preparation of further extensive email correspondence to clients re: same	1.50 155.00/hr	232.50
	AMS Preparation of further responsive email correspondence to Ron Martinez	0.30 155.00/hr	46.50
	GWH E-mail from Lonnie Schwenk re: evaluating criminal histories of employment applicants	0.10 155.00/hr	15.50
	AMS Review of email correspondence from Ron Martinez	0.10 155.00/hr	15.50
1/11/2006	GWH Telephone call to Frank DeCourten re: Heather McColgan	0.10 155.00/hr	15.50
	GWH Telephone call from Frank DeCourten re: Heather McColgan	0.10 155.00/hr	15.50
	AMS Review of email correspondence from Ron Martinez	0.10 155.00/hr	15.50
	AMS Review of email correspondence from Morgan Lynn	0.10 155.00/hr	15.50
	AMS Preparation of correspondence to Morgan Lynn and Ron Martinez re: revisions to separation and release agreement (Tina Ludutsky-Taylor)	0.30 155.00/hr	46.50
	AMS Preparation of revisions to separation of employment and release agreement (Tina Ludutsky-Taylor)	0.80 155.00/hr	124.00

	<u>Hrs/Rate</u>	<u>Amount</u>
1/11/2006 AMS Preparation of correspondence to Susan Sheridan re: revisions to separation and release agreement (Tina Ludutsky-Taylor)	1.10 155.00/hr	170.50
1/13/2006 GWH Preparation of email to Ron Martinez re: Board agenda deadline	0.10 155.00/hr	15.50
GWH E-mail from Ron Martinez re: Heather McColgan	0.10 155.00/hr	15.50
GWH Preparation of assignment of contract for NCC cafeteria contract	1.50 155.00/hr	232.50
GWH E-mail from Ron Martinez re: Heather McColgan	0.10 155.00/hr	15.50
GWH E-mail from Donna Brazil re: NCC Cafeteria Contract Assignment	0.10 155.00/hr	15.50
GWH Preparation of draft contract assignment documents and preparation of email to Donna Brazil	1.00 155.00/hr	155.00
AMS Lengthy telephone conference with Susan Sheridan re: negotiations re: Tina Ludutsky-Taylor agreement	0.40 155.00/hr	62.00
AMS Lengthy telephone conference with Morgan Lynn re: interactions with grand jury	0.50 155.00/hr	77.50
AMS Review and analysis of faxed correspondence and attachments from Morgan Lynn	0.20 155.00/hr	31.00
AMS Telephone conferences with Morgan Lynn and her assistant	0.60 155.00/hr	93.00
AMS Review of email correspondence from Ron Martinez	0.10 155.00/hr	15.50
AMS Telephone conference with Susan Sheridan's assistant re: status of revisions, upcoming board meeting, etc.	0.20 155.00/hr	31.00
AMS Preparation of responsive email correspondence to Ron Martinez	0.20 155.00/hr	31.00
AMS Review of further email correspondence from Ron Martinez	0.10 155.00/hr	15.50
GWH E-mail from Adele Hamlett re: pay contractor vs. employee meeting (Sierra CCD Genl)	0.10 155.00/hr	15.50
AMS Preparation of extensive email correspondence to clients re: negotiations re: separation agreement and release	0.40 155.00/hr	62.00
AMS Conference calls with superintendent/president, vice presidents re: grand jury investigation; recommendations re: handling; research re: same	1.20 155.00/hr	186.00

		<u>Hrs/Rate</u>	<u>Amount</u>
1/13/2006	AMS Preparation of additional changes to employee separation and release agreement	0.30 155.00/hr	46.50
	GWH Exchange of numerous email with Adele Hamlett re: pay contractors vs. employee meeting	0.30 155.00/hr	46.50
1/15/2006	AMS Review and analysis of lengthy email correspondence from superintendent/president and planning re: further handling	0.30 155.00/hr	46.50
1/16/2006	GWH Analysis of grand jury issues	0.30 155.00/hr	46.50
	AMS Preparation of correspondence to Tina Ludutsky-Taylor's attorney re: further revisions to separation agreement	0.50 155.00/hr	77.50
1/17/2006	GWH E-mail from Adele Hamlett re: pay contractor vs. employee sample contracts	0.10 155.00/hr	15.50
	GWH Preparation of email to Adele Hamlett re: Community Ed. instructor's contract	0.10 155.00/hr	15.50
	GWH Preparation of email to Adele Hamlett re: pay contractor vs. employee	0.10 155.00/hr	15.50
	GWH Preparation for and attendance at meeting with Joyce Lopes at Sierra College, with travel	2.00 155.00/hr	310.00
	KMM E-mail correspondence from Rob Koster re insurance requirements/contract (TTUSD)	0.10 155.00/hr	15.50
1/19/2006	AMS Telephone conference with Ron Martinez and Doug Smith re: settlement agreement/release (Tina Ludutsky-Taylor)	0.30 155.00/hr	46.50
1/20/2006	GWH Preparation for and attendance at meeting with Ron Martinez and Mandy Davies re: Milt Lucius, other issues, travel to Rocklin	2.50 155.00/hr	387.50
	AMS Review of email correspondence from Ron Martinez	0.10 155.00/hr	15.50
	AMS Preparation of email correspondence to Susan Sheridan and clients re: Tina Ludutsky-Taylor agreement	0.20 155.00/hr	31.00
	AMS Preparation of correspondence to Susan Sheridan re: revised separation agreement	0.50 155.00/hr	77.50
	AMS Further preparation of additional changes to separation and release agreement	0.50 155.00/hr	77.50
1/22/2006	GWH Preparation of revisions to McColgan proposed release	0.50 155.00/hr	77.50
1/23/2006	GWH E-mail from Adele Hamlett re: community education instructors	0.10 155.00/hr	15.50

		<u>Hrs/Rate</u>	<u>Amount</u>
1/23/2006	GWH Analysis re: community education instrutors' contract and preparation of email to Joyce Lopes and Adele Hamlett re: same	1.80 155.00/hr	279.00
	GWH E-mail from Jeanne Leland re: evaluating criminal history of applicants	0.10 155.00/hr	15.50
	GWH E-mail from Joyce Lopes re: community education instructors' contracts	0.10 155.00/hr	15.50
1/24/2006	GWH Analysis of permissible payments for health benefits by Board members	<del>2.00</del> 155.00/hr	310.00
	GWH E-mail from Ron Martinez re: Board stipend and benefits	0.10 155.00/hr	15.50
1/25/2006	GWH Preparation of opinion e-mail to Ron Martinez, including research and analysis of Board stipends & benefits	0.30 155.00/hr	46.50
	KMM Review and analysis of insurance policies obtained by Rob.Koster re contract conditions and requirements (TTUSD)	1.30 155.00/hr	201.50
	GWH Research and analysis re: whether trustee compensation should be reported on 1040 or 1099; trustees as employees of district for tax purposes	2.00 155.00/hr	310.00
	GWH Preparation of e-mail to Maggie Geddes re: revisions to settlement agreement	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Greg Schneider re: bid forms, analysis of bid forms	0.30 155.00/hr	46.50
	GWH E-mail from Maggie Geddes re: Heather McColgan settlement agreement	<del>0.10</del> 155.00/hr	15.50
	GWH Preparation of email to Mandy Davies re: free speech policies, including research	0.30 155.00/hr	46.50
	GWH Preparation of email to Mandy Davies re: facilities use policies and regulations	0.20 155.00/hr	31.00
1/26/2006	GWH Preparation of e-mail to Ron Martinez re: closed session Board meeting (Heather McColgan and Tina Ludutsky-Taylor)	0.10 155.00/hr	15.50
	GWH Preparation for and attendance at Sierra Board Meeting (Closed Session) re: Tina Ludutsky Taylor and Heather McColgan, with travel to Rocklin	1.50 155.00/hr	232.50
	GWH E-mail from Joyce Lopes re: ability of District to modify payment schedule of overtime to nonexempt employees	0.10 155.00/hr	15.50
	GWH Telephone call to Greg Schneider re: signing bid bonds	0.10 155.00/hr	15.50
1/27/2006	GWH Research re: timely payment of overtime wages for non-exempt employees and potential changes to District payment schedule (Joyce Lopes)	2.00 155.00/hr	310.00



		<u>Hrs/Rate</u>	<u>Amount</u>
1/27/2006	GWH Research, analysis and preparation of opinion e-mail to Joyce Lopes re: ability of District to adjust payment of overtime to nonexempt employees, including research in Labor Code, Education Code, other sources	1.20 155.00/hr	186.00
	GWH Further preparation of Heather McColgan release	1.20 155.00/hr	186.00
	GWH E-mail from Lawrence Lee re: draft 'hold harmless' clause	0.10 155.00/hr	15.50
	GWH E-mail from Lawrence Lee re: claims against District and changes to Board Policy 3810 and Administrative Procedure 3810, with attachments	0.20 155.00/hr	31.00
1/30/2006	GWH E-mail from Lawrence Lee re: draft hold harmless agreement	0.10 155.00/hr	15.50
	GWH E-mail from Lawrence Lee re: International Students Program	0.10 155.00/hr	15.50
	GWH Preparation of extensive email to Lawrence Lee re: claim against District	0.20 155.00/hr	31.00
	GWH Analysis and preparation of email to Lawrence Lee re: claim against District and preparation of revisions to Board agenda language and Notice of Board action	0.50 155.00/hr	77.50
	GWH Analysis and preparation of email to Lawrence Lee re: draft hold harmless agreement	0.70 155.00/hr	108.50
	GWH E-mail from Lawrence Lee re: draft hold harmless	0.10 155.00/hr	15.50
	GWH Analysis of issue and preparation of email to Lawrence Lee re: International Students Program and contract inquiry	0.50 155.00/hr	77.50
	GWH E-mail from Lawrence Lee re: claim against District	0.10 155.00/hr	15.50
	GWH Preparation of settlement agreement re: Heather McColgan	0.30 155.00/hr	46.50
1/31/2006	GWH Telephone conversation with Ron Martinez re: McColgan	0.10 155.00/hr	15.50
	GWH E-mail from Ron Martínez re: Heather McColgan release	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Ron Martínez re: Heather McColgan release	0.10 155.00/hr	15.50
	GWH Analysis of proposed release re: Heather McColgan	0.80 155.00/hr	124.00
	GWH Preparation of email to Ron Martinez re: McColgan release	0.10 155.00/hr	15.50

	<u>Hrs/Rate</u>	<u>Amount</u>
1/31/2006 GWH E-mail from Lonnie Schwenk re: draft hold harmless agreement	0.10 155.00/hr	15.50
For Professional Services Rendered	<u>51.40</u>	<u>\$7,967.00</u>
Additional Charges :		
1/17/2006 Mileage to District for meeting		17.36
1/20/2006 Mileage to District for meeting		17.36
1/31/2006 WestLaw research charges for December 2005		172.32
Photocopy Charges for this period		35.00
Facsimile Charges for this period		6.50
Telephone Charges for this period		0.48
Postal Charges for this period		14.57
Total additional charges		<u>\$263.59</u>
		<u>53.20</u>
TOTAL AMOUNT DUE THIS INVOICE		\$8,230.59
Previous balance		\$7,176.62
Accounts receivable transactions		
2/14/2006 Payment from Sierra Community College District. Check No. 90018062		(\$7,176.62)
Total payments and adjustments		(\$7,176.62)
Balance due		<u>\$8,230.59</u>

**ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT**

Timekeeper Summary

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Alesa M. Schachter	13.70	155.00	\$2,123.50
George W. Holt	36.30	155.00	\$5,626.50
Kellie M. Murphy	1.40	155.00	\$217.00

P.O. 060380

*[Signature]*  
OK to pay

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

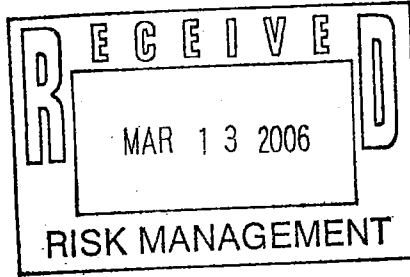
California Plaza

2180 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049



February 28, 2006

PRIVILEGED & CONFIDENTIAL

SIERRA JOINT COMMUNITY COLLEGE

LAURENCE LEE

5000 ROCKLIN RD

ROCKLIN, CA 95677

## Invoice No. 41656

In Reference To: Sierra CCD - labor  
Our File No. 00046

### INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
1/3/2006 GWH Preparation of additional contract language	<del>6.00</del> 155.00/hr	930.00
4/2006 GWH E-mail from Brian Haley re: SCMA negotiating session	<del>0.10</del> 155.00/hr	15.50
GWH Preparation of contract language	<del>9.00</del> 155.00/hr	1,395.00
1/6/2006 GWH Further drafting of contract language	<del>6.00</del> 155.00/hr	930.00
1/9/2006 GWH Preparation of contract language	<del>7.70</del> 155.00/hr	1,193.50
1/10/2006 GWH Further preparation of contract language	<del>5.50</del> 155.00/hr	852.50
1/12/2006 GWH Preparation of contract language	<del>8.30</del> 155.00/hr	1,286.50
1/13/2006 GWH Preparation of contract language	<del>7.00</del> 155.00/hr	1,085.00
1/16/2006 GWH Preparation of contract	<del>8.00</del> 155.00/hr	1,240.00
1/17/2006 GWH Preparation of contract language	<del>5.70</del> 155.00/hr	883.50

	<u>Hrs/Rate</u>	<u>Amount</u>
1/18/2006 GWH Preparation of contract language	<del>6.40</del> 155.00/hr	992.00
GWH E-mail from Millie Roberts re: SCMA negotiation meeting	<del>0.10</del> 155.00/hr	15.50
GWH E-mail from Millie Roberts re: SCMA negotiation meeting	<del>0.10</del> 155.00/hr	15.50
1/19/2006 GWH Preparation of contract language	<del>5.00</del> 155.00/hr	775.00
1/20/2006 GWH E-mail from Brian Haley re: negotiation meeting	<del>0.10</del> 155.00/hr	15.50
1/23/2006 GWH Meeting with Ken Akins re: drafting language for layoff provisions	<del>3.00</del> 155.00/hr	465.00
GWH Preparation of contracts	<del>4.30</del> 155.00/hr	666.50
1/24/2006 GWH Preparation of contract language	<del>6.30</del> 155.00/hr	976.50
1/25/2006 GWH Preparation of contract language	<del>6.00</del> 155.00/hr	930.00
1/30/2006 GWH Preparation of contract language	<del>4.70</del> 155.00/hr	728.50
1/31/2006 GWH Preparation of contract language	<del>5.90</del> 155.00/hr	914.50
For Professional Services Rendered	105.20	\$16,306.00
Previous balance		\$5,115.00
Accounts receivable transactions		
2/14/2006 Payment from Sierra Community College District. Check No. 90017986		(\$5,115.00)
Total payments and adjustments		(\$5,115.00)
Balance due		<u>\$16,306.00</u>

**ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT**

Timekeeper Summary

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
George W. Holt	105.20	155.00	\$16,306.00

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

California Plaza

80 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

March 29, 2006

PRIVILEGED & CONFIDENTIAL

SIERRA COMMUNITY COLLEGE DISTRICT

JOYCE LOPES

5000 ROCKLIN RD

ROCKLIN CA 95677

## Invoice No.41701

In Reference To: Sierra Community College District - General  
Our File No. 44964  
Purchase Order No. 062319

### INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

		<u>Hrs/Rate</u>	<u>Amount</u>
2/1/2006	GWH Preparation of e-mail to Doug Smith re: grand jury request for former superintendent Ramirez' telephone number	0.10 155.00/hr	15.50
	GWH Second e-mail from Doug Smith re: grand jury request for former superintendent Ramirez' telephone number	0.10 155.00/hr	15.50
	GWH E-mail from the Doug Smith re: grand jury request for former superintendent Ramirez' telephone number	0.10 155.00/hr	15.50
	AMS Telephone call from Susan Sheridan and preparation of memo to file re; same	0.10 155.00/hr	15.50
	AMS Lengthy telephone conference with Morgan Lynn and Doug Smith re: grand jury investigation and planning re: handling	0.50 155.00/hr	77.50
2/2/2006	AMS Preparation of responsive email correspondence to Superintendent/Interim President	0.20 155.00/hr	31.00
	AMS Review of email correspondence from Superintendent/Interim President	0.10 155.00/hr	15.50
2/3/2006	AMS Lengthy telephone conference with Superintendent/Interim President and Vice President Human Resources re: personnel matters and recommendations regarding same	0.50 155.00/hr	77.50
	GWH Preparation of further revisions to McColgan settlement agreement	0.50 155.00/hr	77.50
	GWH Preparation of e-mail to attorney Maggie Geddes re: McColgan release revisions	0.20 155.00/hr	31.00

	<u>Hrs/Rate</u>	<u>Amount</u>
2/5/2006 GWH E-mail from Maggie Geddes re: Heather McColgan settlement and release	0.10 155.00/hr	15.50
2/6/2006 KMM E-mail correspondence from Rob Koster re insurance/deductible issue	0.10 155.00/hr	15.50
AMS Lengthy telephone conference with Morgan Lynn and Ron Martinez re: personnel matter and memo to file re: same	0.50 155.00/hr	77.50
AMS Preparation of correspondence to Susan Sheridan re: TLT's resignation, executed separation agreement	0.50 155.00/hr	77.50
GWH E-mail from Maggie Geddes re waiver of March 15 notice (McColgan)	0.10 155.00/hr	15.50
AMS Review of correspondence from Susan Sheridan re: TLT's executed separation agreement and general release	0.10 155.00/hr	15.50
AMS Preparation of correspondence to Morgan Lynn re: separation agreements for TLT	0.30 155.00/hr	46.50
GWH Preparation of email to Ron Martinez re: McColgan settlement and release	0.10 155.00/hr	15.50
2/7/2006 GWH E-mail from Ron Martinez re: McColgan settlement	0.10 155.00/hr	15.50
AMS Two telephone messages for David Casnocha	0.20 155.00/hr	31.00
AMS Preparation of email correspondence to David Casnocha	0.10 155.00/hr	15.50
AMS Very lengthy telephone conference with Bond counsel, Casnocha	0.50 155.00/hr	77.50
AMS Telephone call to Ron Martinez; review of email correspondence from Ron Martinez; telephone conference with Ron Martinez; telephone conference with TLT's attorney's assistant re: resignation, settlement agreement; etc.	0.80 155.00/hr	124.00
KMM E-mail correspondence with Rob Koster re insurance/deductible issue	0.10 155.00/hr	15.50
GWH Research re: ability of Board members and employees to opt out of benefits	5.00 155.00/hr	775.00
GWH Telephone call from Joyce Lopes re: ability of Board members to opt out of benefits, field trip issue	0.20 155.00/hr	31.00
GWH Preparation of email to Ron Martinez re: McColgan settlement	0.10 155.00/hr	15.50
GWH E-mail from Maggie Geddes re: McColgan settlement agreement	0.10 155.00/hr	15.50

	<u>Hrs/Rate</u>	<u>Amount</u>
2/7/2006 GWH E-mail from Maggie Geddes re: letter of recommendation (McColgan)	0.10 155.00/hr	15.50
GWH Telephone call to Maggie Geddes re: discussion of revisions to settlement agreement (McColgan)	<del>0.30</del> 155.00/hr	46.50
GWH Preparation of email to Maggie Geddes re: waiver of March 15 notice (McColgan)	<del>0.10</del> 155.00/hr	15.50
2/8/2006 AMS Review of email correspondence from Morgan Lynn re: TLT's agreement	0.10 155.00/hr	15.50
AMS Preparation of email correspondence to Morgan Lynn re: personnel matters, etc.	0.40 155.00/hr	62.00
AMS Preparation of correspondence to Susan Sheridan re: recommendation letter for TLT	0.20 155.00/hr	31.00
AMS Review of faxed correspondence from Susan Sheridan re: TLT's letter of resignation	0.10 155.00/hr	15.50
GWH Preparation of email to Joyce Lopes re: construction management	0.10 155.00/hr	15.50
GWH Preparation of email to Ron Martinez re: new OSHA regulation	0.10 155.00/hr	15.50
GWH Preparation of email to Ron Martinez re: social security numbers	0.10 155.00/hr	15.50
GWH E-mail from Stephanie Guevara re: McColgan return of District property	0.10 155.00/hr	15.50
GWH Additional research and analysis re: declining benefits, ERISA implications	3.50 155.00/hr	542.50
2/9/2006 GWH Further research and analysis re: whether Board members can decline benefits, related issues	0.90 155.00/hr	139.50
KMM Review and analysis of insurance policy for TTUSD/Rob Koster contract	1.80 155.00/hr	279.00
GWH Preparation of email to Maggie Geddes re: return of McColgan's cell phone, etc.	0.10 155.00/hr	15.50
GWH Telephone call to Joyce Lopes re: benefits issue	0.10 155.00/hr	15.50
GWH E-mail from Maggie Geddes re: McColgan settlement procedure	<del>0.10</del> 155.00/hr	15.50
GWH Preparation of e-mail to Ron Martínez re: McColgan settlement procedure	<del>0.10</del> 155.00/hr	15.50

	<u>Hrs/Rate</u>	<u>Amount</u>
2/9/2006 GWH Preparation of e-mail to Maggie Geddes re: McColgan settlement procedure	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Maggie Geddes re: McColgan settlement	0.10 155.00/hr	15.50
GWH E-mail from Maggie Geddes re: McColgan settlement	0.10 155.00/hr	15.50
GWH E-mail from Lawrence Lee re: proof of service and mailing of notice of rejection of tort claim	0.10 155.00/hr	15.50
GWH Telephone call from Ronald Martinez re: McColgan settlement	0.10 155.00/hr	15.50
2/13/2006 GWH Preparation of e-mail to Maggie Geddes re: Heather McColgan release	0.10 155.00/hr	15.50
GWH E-mail from Maggie Geddes re: Heather McColgan release	0.10 155.00/hr	15.50
GWH Telephone call from Joyce Lopes re: Trustee benefits	0.10 155.00/hr	15.50
GWH Preparation of e-mail to attorney Maggie Geddes re: settlement release and return of District's property	0.10 155.00/hr	15.50
AMS Preparation of correspondence to Morgan Lynn re: fully executed separation and release agreement, resignation letter re: TLT	0.20 155.00/hr	31.00
KMM Further review and analysis of insurance policies for TTUSD/Rob Koster contracts re deductible issue; revisions to contracts	1.90 155.00/hr	294.50
2/14/2006 GWH Review of correspondence from counsel for Heather McClogan re: separation agreement	0.10 155.00/hr	15.50
GWH E-mail from Ron Martínez re: application by hearing impaired applicant for history instructor position	0.10 155.00/hr	15.50
GWH E-mail from Ron Martínez re: Heather McColgan	0.10 155.00/hr	15.50
2/15/2006 KMM E-mail correspondence from Rob Koster re status of deductible inquiry	0.10 155.00/hr	15.50
KMM E-mail correspondence to Ron Martinez re ADA accommodation request (employment application; sight disability)	0.30 155.00/hr	46.50
GWH Preparation of e-mail to Ron Martínez re: Heather McColgan	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Maggie Geddes re: Heather McColgan	0.10 155.00/hr	15.50



	<u>Hrs/Rate</u>	<u>Amount</u>
2/15/2006 GWH Research, analysis and preparation of lengthy e-mail to Ron Martínez re: application for hearing disabled applicant for history instructor position, including suggestions re: potential accommodations, future course of action	0.70 155.00/hr	108.50
GWH E-mail from Jeanne Leland re: Heather McColgan	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Jeanne Leland re: Heather McColgan	0.10 155.00/hr	15.50
GWH Preparation of e-mail to attorney Maggie Geddes re: Heather McColgan	0.10 155.00/hr	15.50
GWH E-mail from Maggie Geddes re: Heather McColgan	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Ron Martínez and Jeanne Leland re: Heather McColgan	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Ron Martínez re: further analysis of application for history instructor position by hearing disabled	0.10 155.00/hr	15.50
GWH Telephone call and separate e-mail from Ron Martínez re: evaluation of proposed new faculty evaluation form	0.20 155.00/hr	31.00
GWH Analysis of proposed new faculty evaluation form and preparation of e-mail to Ron Martínez	0.30 155.00/hr	46.50
GWH Telephone call to Ronald Martinez re: vision impaired employment applicant	0.10 155.00/hr	15.50
2/16/2006 GWH E-mail from Millie Roberts re: preparation of Board agenda item for exchange of Gateway transit bus	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Millie Roberts re: Education Code section 81450.5 (exchange of bus) and research re: resolution, necessary Board findings	0.70 155.00/hr	108.50
GWH E-mail from Millie Roberts re: Board agenda item (exchange of bus)	0.10 155.00/hr	15.50
GWH Research re: limitation on exchange of District property with another public entity (bus) and preparation of e-mail to Millie Roberts	0.80 155.00/hr	124.00
KMM Further analysis of additional documents on insurance policy re contract requirements for insurance, including coverages, limits, exclusions (TTUSD contracts)	2.20 155.00/hr	341.00
GWH E-mail from Millie Roberts re: Board agenda item (exchange of bus)	0.10 155.00/hr	15.50
2/21/2006 GWH E-mail from Joyce Lopes re: sale of bus	0.10 155.00/hr	15.50
GWH Research re: statutory approval for sale of personal property (bus), procedure, preparation of e-mail to Colin Irwin	1.30 155.00/hr	201.50

	<u>Hrs/Rate</u>	<u>Amount</u>
2/27/2006 AMS Review and analysis of email correspondence from superintendent/president Morgan Lynn and review and analysis of attachments re: personnel matter	0.40 155.00/hr	62.00
2/28/2006 GWH Preparation of e-mail to Ron Martínez re: Brown Act Case (Moreno v. King City)	0.10 155.00/hr	15.50
GWH E-mail from Ron Martínez re: Brown Act Case (Moreno v. King City)	0.10 155.00/hr	15.50
GWH Analysis of Brown Act Case (Moreno v. King City), research, and preparation of extensive e-mail to Ron Martínez	0.80 155.00/hr	124.00
GWH Analysis of confidential potential sexual harassment allegations	0.50 155.00/hr	77.50
GWH Preparation of e-mail to Maggie Geddes re: McColgan return of property	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Ron Martínez re: workers compensation and ADA	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Linda Fisher re: benefit documents and Public Records Act request	0.10 155.00/hr	15.50
For Professional Services Rendered	<u>38.10</u>	<u>\$5,905.50</u>
Additional Charges :		
2/1/2006 WestLaw research charges for January 2006		201.04
2/6/2006 Federal Express to Morgan Lynn, Interim President		12.83
2/7/2006 Federal Express from Morgan Lynn, Interim President		15.55
2/28/2006 Photocopy Charges for this period		6.90
Facsimile Charges for this period		2.50
Postal Charges for this period		3.00
Total additional charges		<u>\$241.82</u>
TOTAL AMOUNT DUE THIS INVOICE		<u>\$6,147.32</u>
Previous balance		\$8,230.59
Accounts receivable transactions		
3/20/2006 Payment from Sierra Community College. Check No. 90021732		(\$8,230.59)
Total payments and adjustments		<u>(\$8,230.59)</u>
Balance due		<u>\$6,147.32</u>

ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT

*P.O. 062319*  
*[Signature]*  
*OK to pay*

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

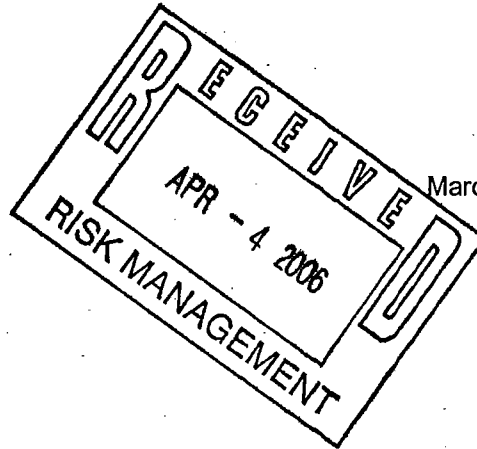
California Plaza

2180 Harvard Street, Suite 560

Yuba City CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049



PRIVILEGED & CONFIDENTIAL

SIERRA JOINT COMMUNITY COLLEGE

LAURENCE LEE

5000 ROCKLIN RD

ROCKLIN CA 95677

## Invoice No.41733

In Reference To: Sierra CCD - labor  
Our File No. 00046

### INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
2/1/2006 GWH Further preparation of contract language	6.00 155.00/hr	930.00
3/2006 GWH Further preparation of contract language	7.30 155.00/hr	1,131.50
2/6/2006 GWH Further preparation of contract language	5.00 155.00/hr	775.00
2/8/2006 GWH Further preparation contract language	4.80 155.00/hr	744.00
2/9/2006 GWH Further preparation of SCMA contract, including layoff provisions for educational administrators for lack of work/funds	5.40 155.00/hr	837.00
GWH Preparation of e-mail to Millie Roberts re: SCMA negotiations	0.10 155.00/hr	15.50
GWH E-mail from Millie Roberts re: SCMA negotiations	0.10 155.00/hr	15.50
2/10/2006 GWH Further preparation of SCMA agreement draft re: educational administrator lay off provisions	8.20 155.00/hr	1,271.00
2/13/2006 GWH Preparation of e-mail to Ron Martinez and Mandy Davies re: proposed SCMA contract language	0.10 155.00/hr	15.50
GWH Further preparation contract proposal language	5.20 155.00/hr	806.00

	<u>Hrs/Rate</u>	<u>Amount</u>
2/13/2006 GWH E-mail from Ron Martínez re: scheduling SCMA negotiating session	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Ron Martínez and Mandy Davies re: SCMA negotiating session	0.10 155.00/hr	15.50
GWH E-mail from Mandy Davies re: scheduling negotiating session	0.10 155.00/hr	15.50
GWH Further preparation of SCMA contract provisions re: educational administrator layoff	2.70 155.00/hr	418.50
2/14/2006 GWH Further preparation contract language	7.40 155.00/hr	1,147.00
GWH Preparation of e-mail to Kenneth Akins re: proposed contract language	0.10 155.00/hr	15.50
2/15/2006 GWH Further preparation contract language	6.00 155.00/hr	930.00
2/16/2006 GWH E-mail from Millie Roberts re: scheduling SCMA/District negotiating meeting	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Ron Martínez and Mandy Davies re: scheduling meeting	0.10 155.00/hr	15.50
GWH E-mail from Ron Martínez re: SCMA/District negotiations	0.10 155.00/hr	15.50
GWH Preparation of email to Ron Martinez re: contract provisions	0.10 155.00/hr	15.50
GWH Further preparation contract language	6.90 155.00/hr	1,069.50
2/17/2006 GWH Further preparation of contract language - SCMA	7.50 155.00/hr	1,162.50
2/21/2006 GWH Further preparation of SCMA contract language	6.50 155.00/hr	1,007.50
2/22/2006 GWH Further preparation of contract language	7.60 155.00/hr	1,178.00
GWH Preparation of e-mail to Kenneth Akins re: SCMA contract proposed language	0.10 155.00/hr	15.50
GWH E-mail from Nancy Jones re: SCMA/District Negotiations	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Nancy Jones re: SCMA/District Negotiations	0.10 155.00/hr	15.50

	<u>Hrs/Rate</u>	<u>Amount</u>
2/22/2006 GWH Preparation of e-mail to Ron Martínez re: revision 2 of the educational administrators layoff proposed language	0.10 155.00/hr	15.50
2/27/2006 GWH SCMA Negotiations - management team meeting	3.00 155.00/hr	465.00
GWH Attend SCMA Negotiations	3.00 155.00/hr	465.00
2/28/2006 GWH Further preparation contract language	7.60 155.00/hr	1,178.00
For Professional Services Rendered	101.60	\$15,748.00
Additional Charges :		
2/27/2006 Mileage to Rocklin Campus		17.36
Total additional charges		\$17.36
TOTAL AMOUNT DUE THIS INVOICE		\$15,765.36
Previous balance		\$16,306.00
Balance due		\$32,071.36

**ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT**

Timekeeper Summary			
<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
George W. Holt	101.60	155.00	\$15,748.00

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

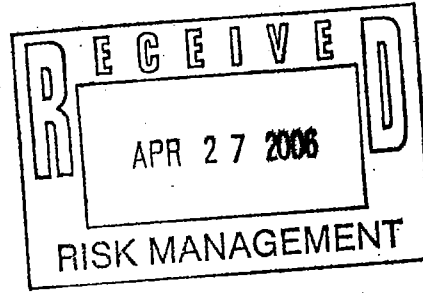
California Plaza

30 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049



April 25, 2006

PRIVILEGED & CONFIDENTIAL

SIERRA JOINT COMMUNITY COLLEGE

LAURENCE LEE

5000 ROCKLIN RD

ROCKLIN CA 95677

Invoice No.41776

In Reference To: Sierra CCD - labor  
Our File No. 00046

## INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
3/1/2006 GWH Further preparation of SCMA contract	10.00 155.00/hr	1,550.00
GWH Further preparation of contract language	5.80 155.00/hr	899.00
3/2/2006 GWH Further preparation contract language	4.10 155.00/hr	635.50
3/3/2006 GWH Preparation of e-mail to Ken Aikens re: proposed SCMA contract language	0.10 155.00/hr	15.50
GWH Further preparation of SCMA contract	9.30 155.00/hr	1,441.50
3/6/2006 GWH E-mail from Lonnie Schwenk re: status	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Millie Roberts re: SCMA update	0.10 155.00/hr	15.50
GWH E-mail from Millie Roberts re: SCMA update	0.10 155.00/hr	15.50
GWH Further preparation of SCMA contract	5.10 155.00/hr	790.50
3/7/2006 GWH Further preparation of SCMA contract	8.30 155.00/hr	1,286.50

	<u>Hrs/Rate</u>	<u>Amount</u>
3/7/2006 GWH E-mail from Ron Martínez re: SCMA negotiations	0.10 155.00/hr	15.50
3/8/2006 GWH Further preparation of SCMA contract	5.00 155.00/hr	775.00
GWH E-mail from Diane McKnight re: SCMA negotiations	0.10 155.00/hr	15.50
GWH E-mail from Millie Roberts re: recollections from February 27, 2006 SCMA negotiating session	0.10 155.00/hr	15.50
3/10/2006 GWH E-mail from Brian Haley re: SCMA negotiation meeting	0.10 155.00/hr	15.50
GWH E-mail from Mandy Davies re: SCMA negotiations	0.10 155.00/hr	15.50
GWH E-mail from Diane McKnight re: SCMA negotiations	0.10 155.00/hr	15.50
GWH E-mail from Brian Haley re: SCMA meeting	0.10 155.00/hr	15.50
3/13/2006 GWH E-mail from Kenneth Akins re: SCMA meeting	0.10 155.00/hr	15.50
GWH Second e-mail from Millie Roberts re: SCMA meeting	0.10 155.00/hr	15.50
GWH E-mail from Judy McClymonds re: SCMA meeting	0.10 155.00/hr	15.50
GWH Second e-mail from Greg Schneider re: SCMA meeting	0.10 155.00/hr	15.50
GWH E-mail from Millie Roberts re: SCMA meeting	0.10 155.00/hr	15.50
GWH E-mail from Greg Schneider re: SCMA meeting	0.10 155.00/hr	15.50
GWH Second e-mail from Lonnie Schwenk re: SCMA meeting	0.10 155.00/hr	15.50
GWH E-mail from Lonnie Schwenk re: SCMA meeting	0.10 155.00/hr	15.50
GWH E-mail from Diane McKnight re: SCMA meeting	0.10 155.00/hr	15.50
GWH E-mail from Brian Haley re: SCMA meeting	0.10 155.00/hr	15.50

		<u>Hrs/Rate</u>	<u>Amount</u>
3/13/2006	GWH Preparation of e-mail to negotiating team members re: scheduling SCMA meeting	0.10 155.00/hr	15.50
3/14/2006	GWH E-mail from Millie Roberts re: cancellation of SCMA negotiations meeting	0.10 155.00/hr	15.50
3/15/2006	GWH E-mail from Nancy Jones re: SCMA negotiations	0.10 155.00/hr	15.50
	GWH Further preparation of SCMA contract	5.80 155.00/hr	899.00
3/16/2006	GWH Preparation of e-mail to Nancy Jones re: SCMA meeting	0.10 155.00/hr	15.50
	GWH Further preparation of SCMA contract	3.00 155.00/hr	465.00
3/20/2006	GWH Preparation of SCMA contract	8.00 155.00/hr	1,240.00
3/21/2006	GWH E-mail from Nancy Jones re: status of SCMA negotiations	0.10 155.00/hr	15.50
3/22/2006	GWH Further preparation SCMA contract	4.20 155.00/hr	651.00
4/2006	GWH Further preparation SCMA contract	4.50 155.00/hr	697.50
3/28/2006	GWH Preparation of e-mail to Millie Roberts re: SCMA negotiation meeting	0.10 155.00/hr	15.50
	GWH E-mail from Millie Roberts re: SCMA negotiation meeting	0.10 155.00/hr	15.50
	GWH E-mail from Ron Martínez re: SCMA meeting	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Ron Martínez re: SCMA negotiating meeting	0.10 155.00/hr	15.50
	GWH Preparation for and attend SCMA Negotiations with travel to Rocklin	4.00 155.00/hr	620.00
	GWH Preparation of revisions to contract language re: educational administrators layoff provisions (SCMA)	0.50 155.00/hr	77.50
3/29/2006	GWH Further preparation of SCMA contract	5.20 155.00/hr	806.00
3/30/2006	GWH E-mail from Millie Roberts re: SCMA negotiation meeting dates	0.10 155.00/hr	15.50



	<u>Hrs/Rate</u>	<u>Amount</u>
3/31/2006 GWH Further preparation of SCMA contract	2.00 155.00/hr	310.00
For Professional Services Rendered	87.90	\$13,624.50
Additional Charges :		
3/1/2006 WestLaw research charges for February 2006		114.89
Total additional charges		<u>\$114.89</u>
TOTAL AMOUNT DUE THIS INVOICE		\$13,739.39
Previous balance		\$32,071.36
Accounts receivable transactions		
4/3/2006 Payment from Sierra Community College District. Check No. 90025315		<u>(\$16,306.00)</u>
Total payments and adjustments		<u>(\$16,306.00)</u>
Balance due		<u><u>\$29,504.75</u></u>

**ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT**

Timekeeper Summary

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
George W. Holt	87.90	155.00	\$13,624.50

*Daniel*  
 \_\_\_\_\_  
 OK to pay

P.O. 062319

		<u>Hrs/Rate</u>	<u>Amount</u>
3/17/2006	GWH Preparation of e-mail to Stephanie Guevara re: return of Heather McColgan's District property	0.10 155.00/hr	15.50
	GWH E-mail from Stephanie Guevara re: Heather McColgan	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Stephanie Guevara re: Heather McColgan	0.10 155.00/hr	15.50
	GWH Further preparation of bus contract	6.10 155.00/hr	945.50
3/18/2006	GWH E-mail from Bill Tsuji re: problems with evaluation of part-time faculty member Jerry Fishman	0.10 155.00/hr	15.50
3/19/2006	GWH E-mail from Stephanie Guevara re: Heather McColgan	0.10 155.00/hr	15.50
3/20/2006	GWH Telephone call to Ronald Martinez re: DSPS	0.10 155.00/hr	15.50
	GWH Preparation for meeting with Ron Martínez, et al.	0.50 155.00/hr	77.50
	DG Telephone call to Brian Keith at Compex re: psychological authorization	0.10 75.00/hr	7.50
21/2006	GWH Preparation of e-mail to Bill Tsuji re: proposed revisions to Jerry Fishman's evaluation; preparation of revisions	1.70 155.00/hr	263.50
	GWH E-mail from Millie Roberts re: Foundation director's contract	0.10 155.00/hr	15.50
	GWH E-mail from Bill Tsuji re: evaluation of Jerry Fishman	0.10 155.00/hr	15.50
	GWH Further preparation of bid packet and contract re: modifications	7.90 155.00/hr	1,224.50
	GWH Analysis re: evaluation of part-time faculty (Jerry Fishman)	0.60 155.00/hr	93.00
3/22/2006	GWH Research re: summer session loading issues	5.10 155.00/hr	790.50
	GWH Preparation of e-mail to Ron Martínez re: summer session loading issues	0.10 155.00/hr	15.50
	GWH E-mail from Linda Fisher re: numerous questions on vacation/sick leave accrual	0.20 155.00/hr	31.00
	GWH E-mail from Ron Martínez re: summer session loading issues	0.10 155.00/hr	15.50

		<u>Hrs/Rate</u>	<u>Amount</u>
4/4/2006	GWH Telephone conversation with Greg Schneider and research re: contracting issues related to 'force accounts'	4.20 155.00/hr	651.00
	GWH Research re: Ruth Flores issues	3.10 155.00/hr	480.50
4/5/2006	GWH E-mail from Ron Martínez re: Ruth Flores	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Jeanne Leland re: FMLA question	0.10 155.00/hr	15.50
	GWH E-mail from Jeanne Leland re: FMLA question	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Ron Martínez re: Ruth Flores	0.10 155.00/hr	15.50
	GWH Telephone call to Jeanne Leland re: leaves of absence	0.10 155.00/hr	15.50
4/6/2006	GWH Telephone call from Ronald Martinez and Mandy Davies re: Ruth Flores	0.10 155.00/hr	15.50
	GWH Research re: Ruth Flores issues and preparation of email to Ron Martinez and Mandy Davies	3.50 155.00/hr	542.50
	GWH E-mail from Ron Martínez re: Ruth Flores	0.10 155.00/hr	15.50
	GWH E-mail from Mandy Davies re: Ruth Flores	0.10 155.00/hr	15.50
	GWH E-mail from Jeanne Leland re: FUSE	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Greg Schneider re: cost accounting	0.10 155.00/hr	15.50
4/7/2006	GWH Telephone call to Jeanne Leland re: FUSE employee issues	0.10 155.00/hr	15.50
4/10/2006	GWH Preparation of extensive e-mail to Sue Fisher re: obligations of District in responding to Public Records Act requests, including research	3.60 155.00/hr	558.00
	GWH E-mail from Ron Martínez re: declined employment letter	0.10 155.00/hr	15.50
	GWH E-mail from Ron Martínez re: criminal history statement for employment applicants	0.10 155.00/hr	15.50
	GWH E-mail from Sue Fisher re: Public Records Act request	0.10 155.00/hr	15.50

		<u>Hrs/Rate</u>	<u>Amount</u>
4/21/2006	GWH E-mail from Jeanne Leland re: leave workshop	0.10 155.00/hr	15.50
4/24/2006	GWH Meeting with Sue Michaels and Mandy Davies re: Public Records Act request, with travel	2.80 155.00/hr	434.00
	GWH Analysis of effect of 4/10 schedule on counting days for various leaves of absence and preparation of e-mail to Jeanne Leland	5.80 155.00/hr	899.00
	GWH E-mail from Jeanne Leland re: effect of 4/10 schedule on counting days for various leaves of absence	0.10 155.00/hr	15.50
4/25/2006	GWH E-mail from Sue Michaels re: Public Records Act request (Newman)	0.10 155.00/hr	15.50
	GWH E-mail from Jeanne Leland re: possible training session	0.10 155.00/hr	15.50
	GWH Research and analysis re: numerous leave of absence issues for Jeanne Leland	5.80 155.00/hr	899.00
	GWH E-mail from Millie Roberts re: proposed new Board policy re: contracts and bids	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Jeanne Leland re: proposed leave of absence workshop	0.10 155.00/hr	15.50
.6/2006	GWH Additional research and analysis re: leave of absence issues	7.80 155.00/hr	1,209.00
4/27/2006	GWH E-mail from Millie Roberts re: draft Administrative Procedure 5570 (credit card vendors)	0.10 155.00/hr	15.50
	GWH Telephone call to Millie Roberts re: rescheduling SCMA meeting	0.10 155.00/hr	15.50
	GWH Research and analysis of proposed Administrative Procedure re: credit card vendors on campus	5.50 155.00/hr	852.50
4/28/2006	GWH Preparation of response to Public Records Act request by Debra Newman, including preparation of correspondence	5.30 155.00/hr	821.50
	GWH Preparation of e-mail to Susan Michaels and Mandy Davies re: Newman Public Records Act request	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Sue Michaels re: Newman Public Records Act request	0.10 155.00/hr	15.50
	GWH Exchange of telephone calls with Sue Michaels re: Public Records Act request	0.20 155.00/hr	31.00
	DG Prepare Bates identification re: documents responsive to Public Records Act request	0.50 75.00/hr	37.50

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

California Plaza

100 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049

May 25, 2006

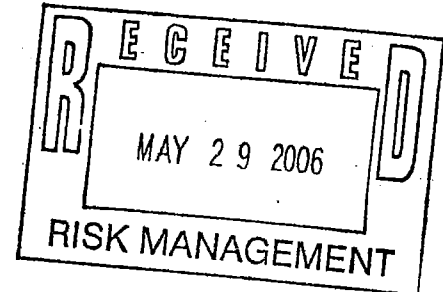
PRIVILEGED & CONFIDENTIAL

SIERRA JOINT COMMUNITY COLLEGE

LAURENCE LEE

5000 ROCKLIN RD

ROCKLIN CA 95677



Invoice No.41858

In Reference To: Sierra CCD - labor  
Our File No. 00046

INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
4/3/2006 GWH Further preparation of SCMA contract	3.50 155.00/hr	542.50
4/4/2006 GWH Further preparation of SCMA contract	4.40 155.00/hr	682.00
GWH Further preparation of SCMA contract	6.00 155.00/hr	930.00
4/6/2006 GWH E-mail from Millie Roberts re: SCMA recollections	0.10 155.00/hr	15.50
4/7/2006 GWH Preparation of SCMA contract	6.00 155.00/hr	930.00
4/10/2006 GWH Preparation of SCMA contract	2.70 155.00/hr	418.50
4/12/2006 GWH Preparation of SCMA contract	3.00 155.00/hr	465.00
4/17/2006 GWH Preparation for and attend SCMA/District Negotiations, with travel	2.50 155.00/hr	387.50
4/19/2006 GWH Preparation of SCMA contract	5.30 155.00/hr	821.50
4/21/2006 GWH E-mail from Millie Robert re: upcoming meeting	0.10 155.00/hr	15.50

	<u>Hrs/Rate</u>	<u>Amount</u>
4/21/2006 GWH Preparation of SCMA contract	4.60 155.00/hr	713.00
4/24/2006 GWH Further preparation of contract provisions	3.20 155.00/hr	496.00
4/26/2006 GWH Further preparation contract provisions	3.00 155.00/hr	465.00
4/27/2006 GWH E-mail from Millie Roberts re: scheduling new negotiating session	0.10 155.00/hr	15.50
GWH E-mail from Doug Smith re: new negotiating session	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Ron Martinez and Doug Smith re: rescheduling meeting with Nancy Jones and Ken Akins due to Ken Akins' dullness	0.10 155.00/hr	15.50
For Professional Services Rendered	<u>44.70</u>	<u>\$6,928.50</u>
Previous balance		\$29,504.75
Accounts receivable transactions		
5/22/2006 Payment from Sierra Community College. Check No. 90027113		(\$15,765.36)
Total payments and adjustments		<u>(\$15,765.36)</u>
Balance due		<u><u>\$20,667.89</u></u>

**ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT**

Timekeeper Summary

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
George W. Holt	44.70	155.00	\$6,928.50

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

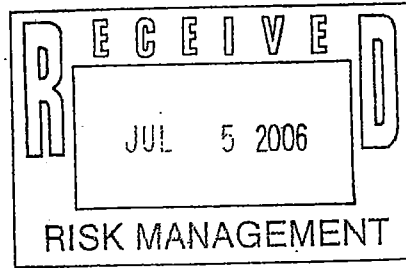
California Plaza

2180 Harvard Street, Suite 560

Sacramento CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049



June 29, 2006

PRIVILEGED & CONFIDENTIAL

SIERRA JOINT COMMUNITY COLLEGE

LAURENCE LEE

5000 ROCKLIN RD

ROCKLIN CA 95677

Invoice No.41993

In Reference To: Sierra CCD - labor  
Our File No. 00046

## INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
5/1/2006 GWH Preparation of drafting contract language	6.80 <del>155.00/hr</del>	1,054.00
GWH Telephone call from Kenneth L. Akins re: scheduling meeting	0.10 <del>155.00/hr</del>	15.50
5/9/2006 GWH E-mail from Nancy Jones re: scheduling negotiating session	0.10 <del>155.00/hr</del>	15.50
GWH Preparation of contract language	8.00 <del>155.00/hr</del>	1,240.00
GWH E-mail from Diane McKnight re: scheduling negotiating session	0.10 <del>155.00/hr</del>	15.50
GWH E-mail from Ron Martinez re: scheduling negotiating session	0.10 <del>155.00/hr</del>	15.50
GWH E-mail from Millie Roberts re: scheduling negotiating session	0.10 <del>155.00/hr</del>	15.50
5/10/2006 GWH Preparation of contract language	8.30 <del>155.00/hr</del>	1,286.50
GWH Preparation of e-mail to Millie Roberts re: scheduling meetings	0.10 <del>155.00/hr</del>	15.50
GWH E-mail from Millie Roberts re: scheduling negotiations	0.10 <del>155.00/hr</del>	15.50

	<u>Hrs/Rate</u>	<u>Amount</u>
5/10/2006 GWH E-mail from Diane McKnight re: scheduling negotiating session	0.10 <del>155.00/hr</del>	15.50
GWH E-mail from Nancy Jones re: scheduling meetings	0.10 <del>155.00/hr</del>	15.50
5/12/2006 GWH Preparation of contract language	7.00 <del>155.00/hr</del>	1,085.00
5/16/2006 GWH E-mail from Brian Haley re: June 5 meeting	0.10 <del>155.00/hr</del>	15.50
GWH E-mail from Kenneth Akins re: meeting recap	0.10 <del>155.00/hr</del>	15.50
GWH Meeting with Nancy Jones & Ken Akins	3.00 <del>155.00/hr</del>	465.00
GWH E-mail from Millie Roberts re: scheduling SCMA negotiations meeting	0.10 <del>155.00/hr</del>	15.50
5/17/2006 GWH Preparation of contract language	4.00 <del>155.00/hr</del>	620.00
5/22/2006 GWH Preparation of e-mail to Kenneth Akins and Nancy Jones re: drafting contract provisions	0.10 <del>155.00/hr</del>	15.50
GWH Preparation of contract language	7.50 <del>155.00/hr</del>	1,162.50
5/23/2006 GWH Preparation of contract language	4.60 <del>155.00/hr</del>	713.00
5/24/2006 GWH Preparation of contract language	7.70 <del>155.00/hr</del>	1,193.50
5/25/2006 GWH Preparation of contract language	4.40 <del>155.00/hr</del>	682.00
5/26/2006 GWH Preparation of contract language	5.60 <del>155.00/hr</del>	868.00
GWH Preparation for and attend meeting with Ken Akins	3.00 <del>155.00/hr</del>	465.00
GWH Preparation of e-mail to Kenneth Akins and Nancy Jones re: meeting	0.10 <del>155.00/hr</del>	15.50
5/30/2006 GWH Preparation for June 5, 2006 negotiating session	0.10 <del>155.00/hr</del>	15.50
GWH E-mail from Millie Roberts re: confirmation of June 5, 2006 negotiating session	0.10 <del>155.00/hr</del>	15.50



	<u>Hrs/Rate</u>	<u>Amount</u>
5/31/2006 GWH Preparation of contract language	7.80 155.00/hr	1,209.00
For Professional Services Rendered	<u>.79.30</u>	<u>\$12,291.50</u>
Previous balance		\$20,667.89
Accounts receivable transactions		
6/12/2006 Payment from Sierra Community College District. Check No. 90027860		(\$13,739.39)
6/26/2006 Payment from Sierra Community College District. Check No. 90028368		(\$6,928.50)
Total payments and adjustments		<u>(\$20,667.89)</u>
Balance due		<u><u>\$12,291.50</u></u>

ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT

Timekeeper Summary

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
George W. Holt	.79.30	155.00	\$12,291.50

*once again  
OK to pay*

*P.O. 062319*

# JOHNSON SCHACHTER & LEWIS

A Professional Law Corporation

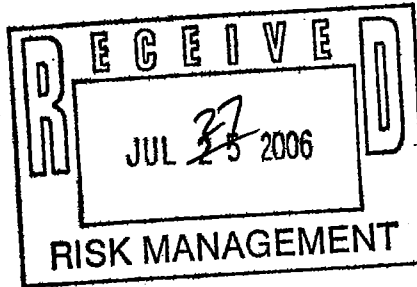
California Plaza

7 Harvard Street, Suite 560

San Francisco CA 95815

Telephone: (916) 921-5800

Tax ID #68-0018049



July 25, 2006

PRIVILEGED & CONFIDENTIAL

SIERRA JOINT COMMUNITY COLLEGE

LAURENCE LEE

5000 ROCKLIN RD

ROCKLIN CA 95677

Invoice No.42057

In Reference To: Sierra CCD - labor  
Our File No. 00046

*(12) 8/3/06 OK TO PAY*

## INTERIM INVOICE FOR PROFESSIONAL SERVICES RENDERED

	<u>Hrs/Rate</u>	<u>Amount</u>
6/1/2006 GWH Preparation of contract language	<u>6.50</u> 155.00/hr	1,007.50
6/2/2006 GWH Preparation of contract language	<u>7.80</u> 155.00/hr	1,209.00
6/5/2006 GWH Preparation for and attend SCMA/District negotiations, with travel	<u>3.70</u> 155.00/hr	573.50
GWH Preparation of contract language	<u>4.80</u> 155.00/hr	744.00
6/6/2006 GWH Preparation of contract language	<u>6.50</u> 155.00/hr	1,007.50
6/7/2006 GWH Preparation of contract language	<u>8.30</u> 155.00/hr	1,286.50
6/8/2006 GWH Preparation of contract language	<u>9.60</u> 155.00/hr	1,488.00
6/9/2006 GWH Preparation of extensive revisions to discharge, layoff, grievance provisions	<u>9.30</u> 155.00/hr	1,441.50
6/12/2006 GWH Preparation of contract language	<u>5.80</u> 155.00/hr	899.00
GWH E-mail from Nancy Jones re: obtaining documents	<u>0.10</u> 155.00/hr	15.50

		<u>Hrs/Rate</u>	<u>Amount</u>
6/12/2006	GWH Meeting with Ken Akins, Nancy Jones re: reviewing, drafting new contract language	2.50 155.00/hr	387.50
6/14/2006	GWH Preparation of contract language	5.40 155.00/hr	837.00
6/15/2006	GWH Preparation of e-mail to Nancy Jones re: obtaining documents	0.10 155.00/hr	15.50
6/16/2006	GWH Preparation of contract language	6.80 155.00/hr	1,054.00
6/19/2006	GWH Meeting with Ken Akins, Nancy Jones re: analyzing, drafting new contract language	2.50 155.00/hr	387.50
	GWH Further preparation contract language	6.20 155.00/hr	961.00
6/20/2006	GWH Further preparation contract language	4.70 155.00/hr	728.50
	GWH Preparation for and attend SCMA/District negotiations, with travel	3.70 155.00/hr	573.50
	GWH E-mail from Kenneth Akins re: concerted activities clause revision	0.10 155.00/hr	15.50
6/20/2006	GWH Further preparation contract language	6.30 155.00/hr	976.50
6/22/2006	GWH Further preparation contract language	8.20 155.00/hr	1,271.00
6/23/2006	GWH Further preparation contract language	7.80 155.00/hr	1,209.00
6/26/2006	GWH Preparation of contract language	7.10 155.00/hr	1,100.50
	LHN Research re: rights of retirees to participate in Collective Bargaining process, review of EERA, PERB regulation, and PERB case law	5.40 155.00/hr	837.00
	GWH E-mail from Millie Roberts re: meeting with Joyce Lopes re: SCMA negotiations meeting I okay	0.10 155.00/hr	15.50
6/27/2006	GWH Preparation for and attend District/SCMA negotiations, with travel	3.70 155.00/hr	573.50
	GWH E-mail from Millie Roberts re: SCMA meeting recollections	0.10 155.00/hr	15.50
	LHN Further research of PERB cases and drafted memo re: retiree participation in Collective Bargaining	3.20 155.00/hr	496.00

	<u>Hrs/Rate</u>	<u>Amount</u>
6/29/2006 GWH Further preparation of contract language	7.80 155.00/hr	1,209.00
6/30/2006 GWH Further preparation contract language	8.20 155.00/hr	1,271.00
For Professional Services Rendered	<u>152.30</u>	<u>\$23,606.50</u>
Previous balance		\$12,291.50
Accounts receivable transactions		
7/14/2006 Payment from Sierra Community College. Check No. 90029165		(\$12,291.50)
Total payments and adjustments		<u>(\$12,291.50)</u>
Balance due		<u><u>\$23,606.50</u></u>

**ALL INVOICES ARE DUE AND PAYABLE UPON RECEIPT**

Timekeeper Summary

<u>Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
G W. Holt	143.70	155.00	\$22,273.50
Lena Nguyen	8.60	155.00	\$1,333.00

		<u>Hrs/Rate</u>	<u>Amount</u>
6/14/2006	GWH E-mail from Stephanie Guevara re: student construction contract	0.10 155.00/hr	15.50
	GWH E-mail from the Jeanne Leland re: voting rights of FUSE retirees	0.10 155.00/hr	15.50
	GWH E-mail from Lawrence Lee re: payment bonds and performance bonds	0.20 155.00/hr	31.00
	GWH Preparation of e-mail to Jeanne Leland re: FUSE retirees	0.10 155.00/hr	15.50
	GWH Meeting with Jeanne Leland re: various leave issues, with travel	2.50 155.00/hr	387.50
	GWH E-mail from Jeanne Leland re: voting rights of FUSE retirees	0.10 155.00/hr	15.50
	GWH Meeting with Morgan Lynn and Stephanie Guevara re: contract for construction classes	1.00 155.00/hr	155.00
6/15/2006	GWH Preparation of opinion e-mail to Lawrence Lee re: performance bonds and payment bonds	0.70 155.00/hr	108.50
	GWH E-mail from Lawrence Lee re: performance and payment bonds	0.10 155.00/hr	15.50
	GWH Preparation of e-mail to Jeanne Leland re: FUSE retirees and voting rights	0.10 155.00/hr	15.50
	GWH Research and analysis re: ability of FUSE retirees to vote in Union election for collective bargaining agreement	7.90 155.00/hr	1,224.50
	GWH Preparation of e-mail to Jeanne Leland re: FUSE retirees	0.10 155.00/hr	15.50
	GWH E-mail from Jeanne Leland re: FUSE retirees	0.10 155.00/hr	15.50
	GWH E-mail from Jeanne Leland re: FUSE retirees	0.10 155.00/hr	15.50
6/17/2006	GWH E-mail from Stephanie Guevara re: student carpentry contract	0.10 155.00/hr	15.50
6/19/2006	GWH E-mail from Millie Roberts re: access to campus grounds for individuals <sup>ML</sup> circulating petition for recall of trustee	0.10 155.00/hr	15.50
	GWH Research, analysis and preparation of e-mail to Millie Roberts re: First <sup>ML</sup> Amendment and circulating petitions for trustee recall on campus	1.00 155.00/hr	155.00
	GWH E-mail from Millie Roberts re: circulating trustee recall petitions on campus <sup>ML</sup> and First Amendment	0.10 155.00/hr	15.50

	<u>Hrs/Rate</u>	<u>Amount</u>
6/20/2006 GWH Preparation of e-mail to Ron Martínez re: employee benefits	0.10 <del>155.00/hr</del>	15.50
GWH E-mail from Jeanne Leland re: FUSE retirees and voting rights	0.10 <del>155.00/hr</del>	15.50
6/21/2006 GWH E-mail from Stephanie Guevara re: injured construction student	0.10 155.00/hr	15.50
6/22/2006 GWH Preparation of e-mail to Stephanie Guevara re: Student Accident, Construction Technology	0.10 155.00/hr	15.50
GWH Preparation of e-mail to Pat Vitale re: Construction and Technology student injured on site	0.10 155.00/hr	15.50
GWH E-mail from Pat Vitale re: investigation progress	0.10 155.00/hr	15.50
6/26/2006 GWH Further preparation of research memorandum re: ability of union retirees to vote on collective bargaining agreement	0.10 155.00/hr	15.50
GWH Preparation for meeting with Stephanie Guevara	0.10 155.00/hr	15.50
6/27/2006 GWH Research and preparation of memorandum re: ability of union retirees to vote on collective bargaining agreements	1.00 155.00/hr	155.00
'2006 GWH Preparation of documents re: Angleton	0.30 155.00/hr	46.50
GWH Exchange of e-mail with Stephanie Guevara re: construction technology meeting	0.30 155.00/hr	46.50
6/29/2006 GWH Exchange of e-mail with Lawrence Lee re: Caltrans v. Smalley (Sierra CCD)	0.30 155.00/hr	46.50
For Professional Services Rendered	<u>35.20</u>	<u>\$5,456.00</u>
Additional Charges :		
6/1/2006 WestLaw research charges for May 2006		89.35
6/30/2006 Photocopy Charges for this period		<del>66.10</del>
Total additional charges		<u>\$155.45</u>
TOTAL AMOUNT DUE THIS INVOICE		<u>\$5,611.45</u>
Previous balance		\$11,319.28
Accounts receivable transactions		
7/14/2006 Payment from Sierra Community College. Check No. 90029165		(\$11,319.28)
Total payments and adjustments		<u>(\$11,319.28)</u>

01-00-00-672000-5730-00-31

935

2005-06

Sierra CCD  
Collective Bargaining  
F/Y 2005/06  
Summary of Reimbursable Legal Services  
John L. Bukey  
Schedule - Bukey 1

Billing Date	Service Date	Employee Contact	Component 1			
			Negotiations			
			NP @ \$125	NT @ \$125	NT Costs	
8/1/05-8/31/05	8/4			5.75	\$20.25	
	8/9		3.50		\$20.25	
	8/24			5.00	\$20.25	
	8/31			4.25	\$20.25	
9/1/05-9/30/05	9/1		4.50		\$24.25	
	9/2			5.25	\$24.25	
	9/7			6.25	\$24.25	
	9/8			5.00	\$24.25	
	9/13		3.50		\$24.25	
	9/15			5.00	\$24.25	
	9/21			5.00	\$24.25	
11/1/05-11/30/05	9/28			6.50	\$24.25	
	11/2		1.00	4.50	\$24.25	
	11/3		1.00	4.25	\$24.25	
	11/9		1.00	3.50	\$24.25	
	11/20		1.00	3.50	\$24.25	
	11/28		1.00	4.25	\$24.25	
12/1/05-12/31/05	12/5		1.00	3.75	\$24.25	
	12/7		1.00	3.25	\$24.25	
	12/8		1.00	3.00	\$24.25	
	12/14		1.00	4.00	\$24.25	
	12/15		1.00	2.00	\$24.25	
1/1/06-1/31/06	1/6		4.50		\$22.25	
	1/17		1.00			
	1/18		1.00	4.00	\$22.25	
	1/19		1.00	3.00	\$22.25	
	1/25		1.00	4.00	\$22.25	
	1/26		1.00	2.00	\$22.25	
	3/1/06-3/31/06	3/1		1.00	4.00	\$22.25
		3/2		1.00	3.50	\$22.25
		3/8		1.00	3.50	\$22.25
		3/9		1.00	3.25	\$22.25
3/13			1.00	4.00	\$22.25	
3/16			1.00	3.50	\$22.25	
3/23			1.00	3.00	\$22.25	
4/3				6.00		
4/27				3.50		
5/3				5.00		
5/8			4.50			
5/11			4.50			
5/17			4.00			
5/22			5.00			
5/24			5.50			
	5/24				\$178.00	
<b>Total Attorney Hours:</b>			<b>38.00</b>	<b>159.75</b>	<b>\$962.50</b>	
<b>Total Staff Hours</b>						

**KEY**

NP	Negotiation Preparation
NT	At-table Negotiations

## ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	TIME
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		NONE

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	TIME
08/04/05	Tripartite Negotiations; Necessary Travel	5.75
08/09/05	Attendance at Board Closed Session; Necessary Travel	3.50
08/24/05	FUSE Negotiations; Necessary Travel	5.00
08/31/05	FUSE Negotiations; Necessary Travel	4.25
<b>TOTAL COLLECTIVE BARGAINING</b>		18.50

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
08/04/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
08/09/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
08/24/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
08/31/05	Travel — 50 Miles @ \$0.405/Mile	\$20.25
<b>TOTAL EXPENSES</b>		\$81.00



## ITEMIZATION

## GENERAL:

NONE	NONE	NONE
<b>TOTAL GENERAL</b>		<b>NONE</b>

## COLLECTIVE BARGAINING:

09/01/05	Planning Meeting on Formula; Necessary Travel	4.50
09/02/05	Uniparty Negotiations; Necessary Travel	5.25
09/07/05	FUSE Negotiations; Necessary Travel	6.25
09/08/05	SCFA Negotiations; Necessary Travel	5.00
09/13/05	Attendance at Board Closed Session; Necessary Travel	3.50
09/15/05	SCFA Negotiations; Necessary Travel	5.00
09/21/05	FUSE Negotiations; Necessary Travel	5.00
09/28/05	JLMC and FUSE Negotiations; Necessary Travel	6.50
<b>TOTAL COLLECTIVE BARGAINING</b>		<b>41.00</b>

## EXPENSES:

09/01/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
09/02/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
09/07/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
09/08/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
09/13/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
09/15/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
09/21/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
09/28/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
<b>TOTAL EXPENSES</b>		<b>\$194.00</b>

# ITEMIZATION

## GENERAL:

DATE	DESCRIPTION	AMOUNT
NONE	NONE	NONE
<b>TOTAL GENERAL</b>		<b>NONE</b>

## COLLECTIVE BARGAINING:

DATE	DESCRIPTION	AMOUNT
11/02/05	FUSE Negotiations; Necessary Travel	5.50
11/03/05	SCFA Negotiations; Necessary Travel	5.25
11/07/05	OMNI Party Negotiations; Necessary Travel	4.50
11/08/05	SCFA Negotiations; Necessary Travel	4.50
11/09/05	FUSE Negotiations; Necessary Travel	5.25
<b>TOTAL COLLECTIVE BARGAINING</b>		<b>25.00</b>

## EXPENSES:

DATE	DESCRIPTION	AMOUNT
11/02/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
11/03/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
11/05/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
11/05/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
11/05/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
<b>TOTAL EXPENSES</b>		<b>\$121.25</b>

*OK to pay*

John L. Bukey  
Attorney at Law

## ITEMIZATION

## GENERAL:

NONE	NONE	NONE
<b>TOTAL GENERAL</b>		NONE

## COLLECTIVE BARGAINING:

12/05/05	Uniparty Negotiations; Necessary Travel	4.75
12/07/05	FUSE Negotiations; Necessary Travel	4.25
12/08/05	SCFA Negotiations; Necessary Travel	4.00
12/14/05	FUSE Negotiations; Necessary Travel	5.00
12/15/05	SCFA Negotiations; Necessary Travel	3.00
<b>TOTAL COLLECTIVE BARGAINING</b>		21.00

## EXPENSES:

12/05/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
12/07/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
12/08/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
12/14/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
12/15/05	Travel — 50 Miles @ \$0.485/Mile	\$24.25
<b>TOTAL EXPENSES</b>		\$121.25

## ITEMIZATION

## GENERAL:

NONE	NONE	NONE
<b>TOTAL GENERAL</b>		NONE

## COLLECTIVE BARGAINING:

01/06/06	Meeting of Subcommittee on Evaluation; Necessary Travel	4.50
01/17/06	Preparation of report of evaluation subcommittee	1.00
01/18/06	FUSE Negotiations; Necessary Travel	5.00
01/19/06	SCFA Negotiations; Necessary Travel	4.00
01/25/06	FUSE Negotiations; Necessary Travel	5.00
01/26/06	SCFA Negotiations; Necessary Travel	3.00
<b>TOTAL COLLECTIVE BARGAINING</b>		<b>22.50</b>

## EXPENSES:

01/06/06	Travel — 50 Miles @ \$0.445/Mile	\$22.25
01/18/06	Travel — 50 Miles @ \$0.445/Mile	\$22.25
01/19/06	Travel — 50 Miles @ \$0.445/Mile	\$22.25
01/25/06	Travel — 50 Miles @ \$0.445/Mile	\$22.25
01/26/06	Travel — 50 Miles @ \$0.445/Mile	\$22.25
<b>TOTAL EXPENSES</b>		<b>\$111.25</b>

## ITEMIZATION

## GENERAL:

NONE	NONE	NONE
<b>TOTAL GENERAL</b>		NONE

## COLLECTIVE BARGAINING:

03/01/06	FUSE Negotiations; Necessary Travel	5.00
03/02/06	SCFA Negotiations; Necessary Travel	4.50
03/08/06	FUSE Negotiations; Necessary Travel	4.50
03/09/06	SCFA Negotiations; Necessary Travel	4.25
03/13/06	Omniparty Negotiations; Necessary Travel	5.00
03/16/06	SCFA Negotiations; Necessary Travel	4.50
03/23/06	SCFA Negotiations; Necessary Travel	4.00
<b>TOTAL COLLECTIVE BARGAINING</b>		31.75

## EXPENSES:

03/01/06	Travel — 50 Miles @ \$0.445/Mile	\$22.25
03/02/06	Travel — 50 Miles @ \$0.445/Mile	\$22.25
03/08/06	Travel — 50 Miles @ \$0.445/Mile	\$22.25
03/09/06	Travel — 50 Miles @ \$0.445/Mile	\$22.25
03/13/06	Travel — 50 Miles @ \$0.445/Mile	\$22.25
03/16/06	Travel — 50 Miles @ \$0.445/Mile	\$22.25
03/23/06	Travel — 50 Miles @ \$0.445/Mile	\$22.25
<b>TOTAL EXPENSES</b>		\$155.75

John Bukay  
Attorney at Law  
1526 Eighth Avenue  
Sacramento, CA 95818-4102

Dated June 6, 2002

ITEMIZATION

COLLECTIVE BARGAINING:

04/03/06 OMNIPARTY Negotiations; Necessary travel  
04/27/06 SCFA Negotiations; Necessary travel  
05/03/06 FUSE Negotiations; Necessary travel  
05/08/06 OMNIPARTY Negotiations; Necessary travel  
05/11/06 FUSE Negotiations; Necessary travel  
05/17/06 FUSE Negotiations; Necessary travel  
05/22/06 FUSE Negotiations; Necessary travel  
05/24/06 OMNIPARTY Negotiations; Necessary travel

6.0  
8.5  
5.0  
4.5  
4.5  
4.5  
4.0  
5.0  
5.5

TOTAL 38 hours @ \$125.00/hour

\$4750.00

EXPENSES:

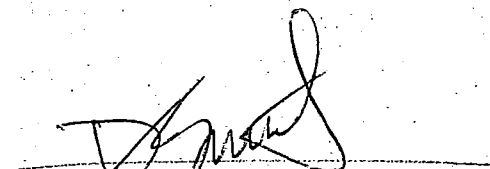
04/03/06 50 miles  
04/27/06 50 miles  
05/03/06 50 miles  
05/08/06 50 miles  
05/11/06 50 miles  
05/17/06 50 miles  
05/22/06 50 miles  
05/24/06 50 miles

TOTAL 400 miles @ \$0.445/MILES

\$178.00

TOTAL DUE

\$4928.00

  
CK to pay

S JCD  
Collective Bargaining  
FY/ 2005-2006 At-table Negotiations (Classified)  
Schedule 1

DATE	Davies, Mandy	Haley, Brian	Leland, Jeanne	Martinez, Ron	McKnight, Diane	Michaels, Sue	Schwenk, Lonnie	Schneider, Greg	Smith, Doug	Lopes, Joyce
7/6/2005			2.50	2.50						
8/4/2005			4.00	4.00	4.00		4.00			4.00
8/10/2005		3.00		3.00	3.00		3.00		3.00	
8/16/2005			3.00	3.00	3.00		3.00			3.00
8/23/2005		3.00		3.00	3.00		3.00		3.00	
8/24/2005			3.00	3.00						
8/29/2005		3.00		3.00	3.00		3.00		3.00	
8/31/2005			2.50	2.50						
9/7/2005			2.50							
9/19/2005		3.00		3.00	3.00		3.00		3.00	
9/21/2005			2.50							
9/26/2005		3.00		3.00	3.00		3.00		3.00	
9/28/2005			2.50							
10/5/2005			3.00							
10/10/2005		3.00		3.00	3.00		3.00		3.00	
10/14/2005			3.00							
10/24/2005		3.00		3.00	3.00		3.00		3.00	
10/31/2005		3.00		3.00	3.00			3.00	3.00	
11/2/2005			3.00							
11/16/2005			3.00							
11/16/2005		3.00		3.00	3.00			3.00	3.00	
11/28/2005	3.00	3.00		3.00	3.00			3.00	3.00	
11/20/2005			3.00							
12/7/2005			2.00							
12/14/2005			3.00							
2/1/2006			3.00							
2/22/2006			2.50							
2/27/2006		4.00		4.00			4.00			
3/27/2006		2.50		2.50			2.50		2.50	
3/29/2006			2.00							
4/17/2006		2.20		2.20	2.20		2.20		2.00	
6/5/2006		3.00		3.00	3.00				3.00	
6/27/2006		3.00		3.00	3.00				2.00	
<b>TOTALS</b>	<b>3.00</b>	<b>44.70</b>	<b>49.00</b>	<b>62.70</b>	<b>45.20</b>	<b>6.00</b>	<b>36.70</b>	<b>12.50</b>	<b>39.50</b>	<b>10.00</b>

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, July 6, 2005  
Time: 2:00 – 4:30 pm  
Place: Fireside Room

2.5

For the District:

Ron Martinez\*

Jeanne Leland

For the Union:

Shari Newman\*

Bernard Acuna

Sue Keller

Geri Snell

\*Chief Negotiator  
Facilitator: Joanne Bodine

### I. CHECK IN

### II. RECOLLECTIONS

### III. OFF AGENDA

1. Off Agenda Subgroup not working well.

**WWW:** Group will think about over July and discuss further @ next meeting.

2. Computer Lab Tech: Employee housed in direct line of sight with library.  
Line of sight is to protect equipment, etc., when no one there.

**WWW:** Shari will contact Diane to discuss further.

3. Need to put evening stipend rate of pay on Rocklin Campus on agenda of next meeting.

4. Language for retiree benefits includes "if permissible" (page 44, line 28) with no further definition of what it means.

**WWW:** Jeanne will follow up with Joyce and report back.

5. Two May 15 grievances need resolution.

**WWW:** Ron has yet to work on them - will respond within 10 days.

6. Henry Eimstad's assistant doing Union work.

**WWW:** Ron will schedule meeting between Mandy, Shari, and himself to discuss further.

**WWW:** Jeanne will loop back to Joyce and update on latest reports.

7. Issue of classified employee and having been temporarily placed in management position and required to continue paying dues, etc. Employee believes he is "in limbo" and wants clarity regarding where he is regarding wages, etc. Current contract allows for 10% differential for those people "assigned" to perform tasks with increased responsibility.

▪ In the case of Colin specifically:

1. Paid at entry level wage range/step for the interim period
2. Can carry over banked S/L and vacation for the interim period
3. Will continue to pay union dues or opt for "leave of absence"
4. Will earn vacation as a manager
5. Retroactive to appointment date to meet FLSA mandates

**WWW:** Article 29 (especially Section 1) will be reviewed and put on next agenda.

**WWW:** Jeanne to develop straw design for dealing with interim assignments



SIERRA USD  
Formula Negotiations  
August 4, 2005

A-16  
8:00AM-12:00PM 4.0

Classified: John Lervold, Shari Newman, Bernard Acuna, Sue Keller,  
Gerri Snell  
District: John Bukey, Ron Martinez, Joyce Lopes, Jeanne Leland  
Faculty: Jim Weir, Patt McDermid, Jim Forkum, Winsome Jackson  
Management: Diane McKnight, Lonnie Schwenk, Greg Schneider  
Facilitator: Neil Bodine

**AGENDA**

1. Check in, agenda, minutes, process check
2. Report on simulation
3. Update on comparability
4. Continued discussion on formula

Diane McKnight will now represent the SCMA

**1. Comparability Study Subcommittee**

- Need to find a date for the meeting of the subcommittee
- Patt and Sue will join the subcommittee
- Subcommittee will review the study
- Committee will meet on August 9 at 8AM in the Admin. Bldg.
- Doug Johnson will present the data in closed session to the Board on August 9

**2. Simulation and Continued Discussions**

- Joyce has spent the last month doing simulation for the last 6 years
- Conclusions:
  1. The formula would help budgeting
  2. Would have created different outcomes than what happened  
→ See handouts
  3. Are able to know in August preliminary figures on new revenue for the year – historically last week of July or 1<sup>st</sup> week of August  
→ COLA  
→ Equalization  
→ Deficit factor  
→ Apportionment from the prior year
  4. Think that there ought to be a floor for personnel cost as a percentage
  5. Think personnel should cover all people, not just bargaining units – excluded contracted employees
- Concerns:

**SCMA/TEAMSTERS MEETING**  
**Recollections**  
**August 10, 2005**  
**9:00AM-12:00PM**

3.0

Management:

Brian Haley, Diane McKnight

Classified Supervisory:

Greg Schneider, Lonnie Schwenk

Teamsters:

Nancy Jones, Ken Akins

District:

Doug Smith, George Holt, Ron Martinez

- When available, send a copy of the Compensation Study to Nancy Jones and Ken Akins
- General discussion regarding process
- Discussion of agency shop implementation – George and Ken will research law
- Management Interests/Sunshine
  - Ken will send email copy of the survey. The results haven't been compiled.
- Future Meeting Dates:
  - Tuesday, August 23 from 2-5:00PM in LR 313
  - Monday, August 29 from 2-5:00PM in LR 313
  - Monday, September 19 from 2-5:00PM in LR 313
  - Monday, September 26 from 2-5:00PM in LR 313

**Formula Negotiations  
August 16, 2005**

A-16

7:00AM-10:00AM

3.0

Classified: John Lervold, Shari Newman, Bernard Acuna, Sue Keller,  
Gerri Snell  
District: John Bukey, Ron Martinez, Joyce Lopes, Jeanne Leland  
Faculty: Jim Weir, Patt McDermid, Jim Forkum, Winsome Jackson  
Management: Diane McKnight, Lonnie Schwenk, Greg Schneider  
Facilitator: Neil Bodine

**AGENDA**

1. Check in, agenda, minutes, process check
- 2a. Report from the Board
- 2b. Review draft language
3. Report on comparability study
4. Next steps

**1. Report from the Board**

- The Board reviewed the elements of the straw design
- Thanked group for its hard work
- Need more time to absorb
- Have questions about transition
- The Board will want a special session to review the language

**2. Comparability Study**

- Committee met with Doug Johnson
- Still need some more data
- Will be coming out with a final report
- Will need to do some education on benchmarking to answer why some positions were not studied
- Will hold another subcommittee meeting

**3. Draft Language**

a. Preamble

→ Handed out a draft

**AGREED: AS PRESENTED**

b. Formula

→ Handed out a draft

- 2.2.2 – vacant = unfilled and approved until deleted, so clear when no longer exists

**Changes:**

- Remove 2.37 – supplanted by 2.15

**SCMA/Teamsters Negotiations  
Recollections  
August 23, 2005**

LR 313  
2-5:00PM

30

Classified Supervisory:  
Management:  
Teamsters:  
District:

Lonnie Schwenk, Greg Schneider  
Diane McKnight, Brian Haley  
Nancy Jones, Ken Akins  
Ron Martínez, Doug Smith, George Holt

**AGENDA**

1. Check in
2. Agenda
3. Process Check

**1. Election for Agency Shops**

- Must have 30% of bargaining unit sign petition demanding election
- State Mediation & Conciliation – 3<sup>rd</sup> party agency would handle election at no cost (Mickey Callahan at San Francisco office)
- Employer remains neutral
- Need 50% + 1 of voters to make a decision

**2. Ground Rules**

- Courteous and respectful
- Everything is confidential
- Start and end meetings on time
- Put cell phones on vibrate
- Use consensus model
- Have the right to bring up elephant and time outs (process check)
- Have the right to caucus

**3. Compensation Study**

- Doug Johnson will present the compensation study at the FUSE meeting on August 24 from 2-2:30PM
- Should be about positions, not people
- Focus on scale
- Many single person positions in management
- Classified supervisory positions have not recently been reclassified, they are just getting COLAs and compensation at the same rate as everyone else
- When these positions are vacated, only then are they assessed
- After Doug Johnson's report, there will be an internal assessment to pinpoint positions that are out of line and adjustments will be made
- More inequities in management than other employee groups

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, August 24, 2005  
Time: 2:00 – 5:00 pm  
Place: LRC 201

3.0

### For the District:

Ron Martinez\*

Jeanne Leland

John Bukey

\*Chief Negotiator

### For the Union:

Shari Newman\*

Bernard Acuna

Sue Keller

Geri Snell

Jeff Lloyd

Due to scheduling constraints, today's meeting began with a **Formula Negotiations Comparability Subcommittee** meeting. Participants included: Consultant – Doug Johnson of Johnson & Associates; SCMA - Lonnie Schwenk, Brian Haley; SCFA – Winsome Jackson, Patt McDermid; FUSE and District – see above.

The group had additional questions for Doug since his initial presentation of the salary information. There were several questions as to what the numbers meant, how analysis was done. The group felt that a description of the process used needs to accompany the study to avoid confusion with interpretation. Also, Patt suggested removing the average totals on the faculty page and to extend out career maximums.

The newly formed SCMA was not in on the initial study development. Ron would like Doug to come to an SCMA meeting to provide information and inform the SCMA group that this is not a classification study but a comparability study.

### Status

- 1) The subcommittee would like to review requested edits along with the benefits data before final report to the Board and would like to meet with Doug one more time to do so.
- 2) This group needs to decide where this information will go (public, internal only, or other options). The final study needs to be reviewed by the formula negotiations group and all information is to remain confidential until these next steps are completed.
- 3) Doug should provide a narrative of the analysis, as an appendix to the study. Also, add a column to the part-time faculty analysis.
- 4) Doug said he should have the outstanding benefits information by the end of the week.

### **FUSE/District Negotiations (2:55)**

Facilitator: John Bukey

#### **I. CHECK IN**

#### **II. RECOLLECTIONS – Delete WWW for Jeanne under item 6.**

**SCMA/Teamsters Negotiations  
Recollections  
August 29, 2005**

LR 313  
2-5:00PM

3.0

Classified Supervisory:  
Management:  
Teamsters:  
District:

Lonnie Schwenk, Greg Schneider  
Diane McKnight, Brian Haley  
Nancy Jones, Ken Akins  
Ron Martinez, Doug Smith, George Holt

**AGENDA**

1. Check in
2. Review agenda and recollections
3. Items in progress
4. George asked if the members would agree to him bringing a colleague so that she could be educated on negotiations – AGREE
5. No need for alternate members
6. Check out

**1. Compensation Study**

- Did not receive final report from Doug Johnson at August 24 meeting
- Report will be available in 2-3 weeks
- Other bargaining units were concerned about confidentiality if Doug Johnson should come to SCMA/Teamsters meeting
- Studied 12 positions and were interested in another 25 classified managers and supervisors

**WWW:** Ron will contact Doug Johnson and invite him to either the meeting on the 19<sup>th</sup> or 26<sup>th</sup> to discuss process and procedures of compensation study.

**WWW:** Lonnie will contact Winsome Jackson to further clarify confidentiality concern.

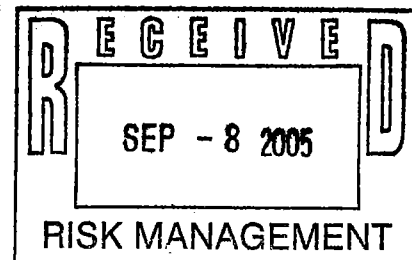
**2. Agency Shop**

- Ken misquoted the Ed. Code on the process for agency shop
- Union must send out a Hudson Letter, which identifies where the money/fees that are collected will go
- Money would be escrowed until Hudson Letter is created and sent
- Union has to request agency fees from constituents and explain how the fee was determined
- Only election required is to rescind agency fees and this would be administered by PERB – if voted down it is voluntary
- District will provide addresses of staff and will implement payroll deductions
- For Management Union, would decide what hourly rate is for each union member and deduct 2 ¼ hours for their dues

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, August 31, 2005  
Time: 2:00 – 4:30 pm  
Place: LR 201

2.5



For the District:  
Ron Martinez\*  
Jeanne Leland  
John Bukey  
Kaylene Hallberg

For the Union:  
Shari Newman\*  
Bernard Acuna  
Sue Keller  
Geri Snell

\*Chief Negotiator  
Facilitator: Robyn Hargrave

Meetings will be every Wednesday (up to 30) from 2-5:00PM.

### 1. Off-Agenda Items

- Emails/phone calls were set – some follow up to continue
- Not sure if "subject line" was used
- Off-agenda items will be responded to by email unless specified it is coming back to group
- Check back each meeting to how well the email system is working
- Put parking lot items at end of recollections

### 2. Retiree Benefits

- Jeanne followed up with Dennis Lee... retirees are retirees at 65
- At time of contract re-write, may need to clarify what is meant by. "if permissible"
- Shari will follow up with people who were concerned
- Retiree dental plan meeting at Ron's office on September 6 at 2PM

### 3. Grievances

- Jeanne and Shari talked and have a meeting 9/1/05 at 9AM

### 4. Consultant – IT Consultant's assistant is reported as doing classified work. Discussion pending

### 5. Article 29...

- Sue handed out draft language
- All need to read article completely to see if there is anything else to address
- Article 29 completely opened... talk about steps... Classified to Management
- Jeanne, Sue and Geri to get together and talk about pay loss scenarios... will report back on 9/28

### 6. 29K Issue...

Discussion pending

### 7. SST - Financial Services NCC/Rocklin

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, September 7, 2005  
Time: 2:00 – 4:30 pm  
Place: LR 201

2.5

### For the District:

Jeanne Leland\*  
Kaylene Hallberg  
John Bukey

### For the Union:

Shari Newman\*  
Bernard Acuna  
Sue Keller  
Geri Snell

\*Chief Negotiator  
Facilitator: Robyn Hargrave

### 0. Retiree Benefits

**WWW:** John will draft language to clarify "if permissible" in Contract.

- Sue Drennon is drafting language to explain dental plan for retirees

### 0. Fit for Duty Form

- FUSE brought in a form, Fitness for Duty, that a member was given by a Dean. The Dean wanted the member's doctor to complete the form.
- District has a legal obligation to know that an employee is released and if any restrictions apply.
- FUSE is curious about where the form came from.
- Are we going to be using it in the future?
- Does it need to be negotiated?

### 0. Payroll

- FUSE members upset about changes in Payroll without any communication
  - Stipends
  - Checks on the 10<sup>th</sup> are direct deposited, you cannot pick them up
- FUSE would like meeting with management before 9/30/05
- District is re-examining things/processes in Payroll
- Jeanne will report this to Payroll supervisors
- Payroll is making direct deposits into one account per person – Payroll will no longer make deposits into multiple accounts

### 0. Grievance

- Level 4 Grievance – Morgan, Shari, Sue, Bernard, and Ron will meet to discuss

### 0. Consultant

- Jeanne will follow up with Ron regarding meeting with Shari and Mandy Davies (from recollections of August 24, Item #6)

### 0. Meeting Dates

- No negotiations on 9/14
- 9/21 – 2-5:00PM

### 0. 29K Issue - Postponed



# SCMA/Teamsters Negotiations

## Recollections

September 19, 2005

LRC 313

2:00-5:00 p.m.

3.0

Classified Supervisory  
Management:  
Teamsters:  
District:

Lonnie Schwenk, Greg Schneider  
Diane McKnight, Brian Haley  
Nancy Jones, Ken Akins  
Ron Martinez, Doug Smith, George Holt

Guest: Doug Johnson

### AGENDA

1. Check-in
  2. Review/adopt agenda/recollections
  3. Items in Progress
    - 3.1 Compensation Study with Doug Johnson
    - 3.2 Agency Shop
    - 3.3 SCMA Contract
    - 3.4 Job Security/Length of Contract
    - 3.5 Consultants and Interims
    - 3.6 Timesheets
  4. Check Out
- 
1. Check-in: Brian Haley was the Facilitator for the day.
  2. Review/adopt agenda/recollections: Recollections of August 29, 2005 meeting were accepted as written.
  3. Compensation Study with Doug Johnson
    - Base study survey is completed; benefit analysis is last to be completed
    - Next step is to submit draft report to district, receive feedback and complete any follow-up research
    - This report will not address classification issues
    - Doug's company can provide costs analysis of implementation if requested by the District
    - Group clarified that the preliminary study is confidential within the subgroup until the final report is released
    - Ron confirmed that the district has contracted for a classification study that will include the classified staff and classified supervisors
    - Discussed waiting to release the final report until after the compensation formula is ratified by the Board and units
    - Once study is released, questions on the study to go through HR/Jeanne to Doug Johnson
  4. Agency Shop

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, September 21, 2005  
Time: 2:00 – 4:30 pm  
Place: LR 201

2.5

### For the District:

Jeanne Leland  
Kaylene Hallberg  
John Bukey

### For the Union:

Shari Newman\* (absent)  
Bernard Acuna  
Sue Keller (absent)  
Geri Snell  
Jeff Lloyd

\*Chief Negotiator  
Facilitator: Robyn Hargrave

- I. Check In
- II. Recollections/Agenda
- III. Process ✓ - Rumor Control – Heads Up
- IV. Issues

#### 1. Fit for Duty Form

WWW: Jeanne will do fact finding regarding form

#### 2. Retiree Benefits

- Article 9/Section 8&9 suggested correction:  
If coverage is permissible under contracts in force with carriers at the time, (insert this at Line 31 after District,)
- Strike Line 28: If permissible under contract in force with carriers at this time,
- Suggestion is to make the same correction in Section 9

WWW: FUSE to check with Shari 9/28

- Sue Drennon memo on retiree dental plan moved to JLMC

#### 3. Payroll

- Jeanne notified Payroll, she is awaiting response
- Stipend pay
- 20-hour a week employee that have to payback over payment amounts
- Evening stipend and when it's paid

WWW: FUSE to clarify with Shari and Sue different payroll issues.

WWW: FUSE to compile a list of issues.

WWW: Jeanne will schedule meeting with Linda, Marcy, and FUSE.

#### 4. Grievance

- Meeting scheduled

WWW: 9/28/05

#### 5. Consultant

- Issue from 8/24 Item #6 Recollections

WWW: Jeanne will follow up with Ron

#### 6. 29K Issue – Pending

**SCMA/Teamsters Negotiations  
Recollections**

**September 26, 2005**

LRC 313

2:00-5:00 p.m.

3-0

Classified Supervisory  
Management:  
Teamsters:  
District:

~~Lonnie Schwenk~~ Greg Schneider  
~~Diane McKnight~~ Brian Haley  
~~Nancy Jones~~ Ken Akins  
~~Ron Martinez~~ Doug Smith George Holt

**AGENDA**

1. Check-in ←
2. Review/adopt agenda/recollections ←
3. Items in Progress
  - 3.1 Compensation Study with Doug Johnson
  - 3.2 Agency Shop
  - 3.3 SCMA Contract
  - 3.4 Job Security/Length of Contract ←
  - 3.5 Consultants and Interims
  - 3.6 Timesheets
- 4 Check Out

1. Check-in: Brian Haley was the Facilitator for the day.
2. Review/adopt agenda/recollections: Recollections of September 19, 2005 meeting were accepted as written.
3. Item in Progress
  - 3.3 Ken and George will continue to workout language on standard/boiler plate sections and bring back to the group. Ken distributed binders for the CB agreement.
4. Job Security/Length of Contract  
Began using collaborative process for this item. Diane is the facilitator.

**ISSUE**

- Job security – protection from political interference
- Dismissal of competent managers
- No due process for job separation
- Fear of Sierra College politics – Board action

**CRITERIA**

- Ed Code: See Management Handbook
- Government Code re: buy out
- Right of assignment

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, September 28, 2005  
Time: 2:00 – 4:30 pm  
Place: LR 201

25

### For the District:

Jeanne Leland\*  
Kaylene Hallberg  
John Bukey

### For the Union:

Shari Newman\*  
Bernard Acuna  
Sue Keller  
Gerri Snell  
Jeff Lloyd

\*Chief Negotiator  
Facilitator: Robyn Hargrave

- I. Check In
- II. Recollections/Agenda
- III. Process ✓ - Rumor Control – Heads Up
- IV. Off-Agenda

1. Report out from Worker's Comp meeting
  - Concerns that were discussed:
    - Sick leave not being returned in a timely manner
  - Outcome was – Tina will reimburse sick leave as soon as it is approved

**WWW:** Jeanne and Tina with work on writing a procedure for Worker's Comp to be completed in November 2005.

  - Issues to discuss regarding Worker's Comp:
    - Sick leave being used prior to Worker's Comp being approved
    - Short hours (follow up appointments) covered
    - Release time for physical therapy and doctor appointments
    - Contract and Worker's Comp law language differs
    - 60-day limitation
    - Industrial illness line item on time card
    - Everybody has the same process for Worker's Comp

### V. Issues

1. Fit for Duty Form
  - Came from legal counsel – it's an HR form for report back
  - FUSE and District want to discuss form, both format and use. They will also incorporate input from EEO person.
  - This will be an information sharing process
2. Retiree Benefits

**WWW:** FUSE to research notes/minutes earlier negotiations, around the 1985 coverage.

**WWW:** Sue will take item to the Benefits Committee – Sue to report back 11/2/05.
3. Payroll
  - Some stipends paid at the end of the month, some paid on the 10<sup>th</sup>.

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, October 5, 2005  
Time: 1:30 –4:30 pm  
Place: LR 201

3.0

### For the District:

Jeanne Leland\*  
Kaylene Hallberg  
John Bukey

### For the Union:

Jeff Lloyd  
Bernard Acuna  
Sue Keller\*  
Gerri Snell

\*Chief Negotiator  
Facilitator: Robyn Hargrave

### **I. Check In**

### **II. Recollections/Agenda**

### **III. Process ✓ - Rumor Control – Heads Up**

1. Union staff worker is not a Sierra Community College employee. She has authority to work with FUSE members and interpret the contract.

**WWW:** Jeanne will check about payment to Union staff worker.

2. How are we going to handle/deal with fact finding?

### **IV. Off-Agenda**

1. Employee in backfill position may be doing job responsibilities out of his pay scale

**WWW:** Kaylene will check actual duties – offline.

2. Deans' Council

Agreement has been that what is reported to Deans' Council from Management Rep from FUSE negotiations will be discussed at FUSE

3. Workers Comp

- Jeff reported that Tina has sent comprehensive memos to employee's that are/were affected

4. Release Time for Business Manager

- Business Manager needs 100% release time
- Business Manager having difficulty in training person for her job
- District/FUSE revert to contract
- District would be left to 175 days of Sue's position being filled – no one in that position after the 175 days
- Make academic AA's position 4 day – Sue would take 100% release
- P.E. office overloaded
- Hire second temp to do Admin. Secretary

OPTION: Temp in Sue's position now, would go 4 days a week – hire 2<sup>nd</sup> temp as Admin. Secretary, 4-day schedule alternating the "day off" between the 2 temps

- Sue will work with temp until 11/3/05 – Sue will work an adjusting release time schedule until 11/3/05
- This option is pending the 175 temp. work week

**SCMA/Teamsters Negotiations  
Recollections**

**October 10, 2005**

LR 313  
2-5:00PM

3-0

Classified Supervisory:  
Management:  
Teamsters:  
District:

Lonnie Schwenk, Greg Schneider  
Diane McKnight, Brian Haley  
Nancy Jones, Ken Akins  
Ron Martinez, Doug Smith, George Holt

**AGENDA**

1. Check in
2. Review agenda and recollections
3. Items in progress
4. Check out

**A. CACT Discussion**

- Consensus – recommend that Exec consider contract services for consultant.

**B. Exempt Status RE: Hours, Sick Leave, etc.**

- Lonnie reported that the Business Office drafted a modified timesheet

**C. Exempt Status re Classified Managers**

- One employee timesheet issue will be addressed off-line
- Doug reported that he is continuing to work with Business staff to address the potential for timesheet documentation.

**D. George Holt Reported That 18 Months is the Maximum Buy-Out Period that a District May Provide**

**E. Certificated Contracts**

- Ron provided copies of existing certificated contracts, both faculty and administration  
**WWW:** Ron, Jeanne, check several administrators/managers (TLT, Lonnie, Diane) for the application of longevity (refer to Management Handbook pg.13-14)

**F. Discussion**

- All agreed to limit discussion to the agenda so that we can get the contract complete.

**G. Job Security Issue**

- Options
- Interest in articulating rights of classified managers interest of job

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, October 14, 2005  
Time: 1:30 - 4:30 pm  
Place: LR 201

3.0

### For the District:

Jeanne Leland\*

Kaylene Hallberg

John Bukey (absent)

### For the Union:

Jeff Lloyd (absent)

Bernard Acuna (absent)

Sue Keller\*

Gerri Snell

Eunis Benecke (absent)

\*Chief Negotiator

Facilitator: Robyn Hargrave

### **I. Check In**

### **II. Recollections/Agenda**

### **III. Process ✓ - Rumor Control – Heads Up**

### **IV. Off-Agenda**

#### 1. Longevity Contract Language

- Jeanne brought a copy of the longevity contract language for the group
- A FUSE member had questioned if they were being paid correctly
- Both FUSE and the District researched old files, notes, etc., from negotiation meetings
- It has been determined that the word "commencement" was in error and should have been "completion." The negotiating team is in agreement.

**WWW:** Jeanne will prepare an email and distribute. Sue will distribute to all FUSE members – CLOSED.

#### 2. Release Time

- Another temp can be hired for 148 days
- If the temp hired (to originally replace Sue... then was used to cover other duties) exceeds her time, FUSE questioned being charged for charges of hiring another temp, FUSE wants the District to cover the expenses they are responsible for in replacing Sue

**WWW:** Jeanne will write Sideletter.

#### 3. Payroll

- A Payroll schedule was placed with paychecks
- People are very confused about it and why they received it
- In an attempt for better communication, this didn't work
- We could help Payroll by being specific about what information/communication people are needing or wanting
- Normal pay stable
- Stipend pay – we don't know for sure, but believe they are input manually
- Annual compensation statement with retros
- When are stipends paid?

# SCMA/Teamsters Negotiations

## Recollections

October 24, 2005

LRC 313

2:00-5:00 p.m.

44-98

3.0

Negotiations  
(classified)

Classified Supervisory

Management:

Teamsters:

District:

79 98  
Lonnie Schwenk, Greg Schneider  
Diane McKnight, Brian Haley  
Nancy Jones  
Ron Martinez, Doug Smith, George Holt  
87-40 87-40

1. Check-in: Ron Martinez was the Facilitator for the day. Ken Aiken was unable to attend.
2. Review/adopt agenda/recollections: Recollections of October 10, 2005 meeting were accepted as written.
3. Side Letter: Compensation Formula and Compensation for 2005-2006 Transition Year - Developed and signed a Letter of Agreement between SCMA and the District agreeing to adopt the compensation formula as negotiated by the Omniparty on October 6, 2005, which becomes effective on July 1, 2005. Also agreed to accept the compensation agreement for the transition 2005-2006 year. If ratified by SCMA members will become part of the contract being developed and will be on the November 8, 2005 agenda for approval by the Board of Trustees.
4. Items in Progress:
  - a. CACT Discussion: Ron reported that Sandra Scott brought the discussion to Executive Council. Survey will be taken of the seven colleges with CACT programs to determine if they are under the leadership of a district employee or independent contractor. Executive Council will address again after the survey.
  - b. Timesheets for Exempt Employees: Doug reported on the WWW with Joyce Lopes and Linda Fisher regarding the legalities or auditor requirements to have exempt employees record hours worked and not worked on timesheets. The opinion of both was that reporting whole day absences was sufficient.

WWW: Lonnie to work with Linda Fisher to draft a sample timesheet that could be used by exempt employees and bring it back to this group.
  - c. Certificated Contracts - Longevity: Question still needs to be answered as to when longevity "kicks" in for SCMA members.



## SCMA/Teamsters Negotiations

### Recollections

October 31, 2005

LRC 313

2:00-5:00 p.m.

3.0

Classified Supervisory  
Management:  
Teamsters:  
District:

Greg Schneider  
Diane McKnight, Brian Haley  
Ken Aiken  
Ron Martínez, Doug Smith, George Holt

Guest: Fred Harris, Assistant Vice Chancellor, Chancellor's Office was in attendance as a requirement of a CBO mentor class he is taking and thanked the group for allowing him to sit in on the session.

1. Check-in: Diane McKnight was the Facilitator for the day. Lonnie Schwenk and Nancy Jones were absent.
2. Review/adopt agenda/recollections: Recollections of October 24, 2005 meeting were accepted as written.
3. Handouts:  
Ken distributed documents for review and a starting point for contract development which will be discussed at a future meeting:
  - a. Tests for deciding whether the employer had just cause for disciplining an employee (developed by practice)
  - b. Discipline and Discharge (Ken drafted)
  - c. Grievance Procedure (Ken drafted)
  - d. Article 16: Progressive Discipline (from the FUSE agreement)

WWW: George to review and consult with District; then get back with Ken

4. Items in Progress:
  - a. Retreat Rights Diagrams: began to review
    1. No existing process of what to do with categorically funded positions if the grant goes away.
    2. Possibly develop a "regression ladder" in regards to bumping into the Classified unit
    3. George clarified that the 88000 sections of the Ed Code do not pertain to classified managers, just classified staff.
  - b. Review of WWW's from previous meeting:
    1. Ron confirmed that the longevity was calculated at completion of years of services for three SCMA members (Tina L-T, Lonnie and Diane) .
    2. Ron did send Nancy copies of existing evaluation forms.

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, November 2, 2005  
Time: 1:30 -4:30 pm  
Place: LR 201

3.0

### For the District:

Jeanne Leland\*  
Kaylene Hallberg  
John Bukey

### For the Union:

Jeff Lloyd  
Bernard Acuna  
Sue Keller\*  
Gerri Snell  
Eunis Benecke

\*Chief Negotiator  
Facilitator: Robyn Hargrave

- I. Check In
- II. Recollections/Agenda
- III. Process ✓ - Rumor Control – Heads Up
- IV. Off-Agenda – Training Needs
- V. Elephants...

- Outcome:

Revisit the "evaluation" process by subgroup (Sue, Bernard, Colin, John). Product will be a straw design that 1) reviews Article 17 and the yellow book and 2) makes suggestions for changes to make the process more clear.

Deadline: Report out by first meeting in December.

- VI. Recollections

- #6, Bullet 3: She is hired as a temp because she is doing the type of work that classified employee's perform.

- VII. Off Agenda

- 1. Training needs
- 2. Retiree Medial Expense Reimbursement Plan (Post 94)
- 3. Payroll attendees
- 4. Classification Study
- 5. Temp Advertisements
- 6. Uniforms
- 7. Ratification
- 8. Longevity

- IX. Consultant

- 1. Mandy looking at Stan doing backup from unit job descriptions. Brian performs task lists and leads projects and technology knowledge transfer is not taking place.
- 2. **WWW:** Mandy going to look into these issues and Yvonne will follow up as well.
  - 1. **Training Needs:** There were recent discussions regarding employee training needs generally. If FUSE can identify subject areas where training might be beneficial, let Jeanne know by topic.

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, November 16, 2005  
Time: 1:30 –4:30 pm  
Place: LR 201

3.0

### For the District:

Jeanne Leland\*  
Kaylene Hallberg  
John Bukey

### For the Union:

Jeff Lloyd  
Bernard Acuna  
Sue Keller\*  
Gerri Snell  
Eunis Benecke

\*Chief Negotiator  
Facilitator: Robyn Hargrave

### **I. Check In**

### **II. Recollections/Agenda**

- Recollections from 11/2 corrections: Under #IX, the numbered items -1, 2, 3, 4 – should be moved to left margin
- When corrections are made to the recollections, Jeanne will forward to entire team

### **III. Process ✓ - Rumor Control – Heads Up**

### **IV. Issues**

### **V. Off Agenda**

- Management staff is telling classified staff not to call FUSE when they have a problem

**WWW:** Jeanne and Sue will meet offline to discuss this.

- Classification Study
  - Faculty coordinator and staff that work there
  - People who work in labs may have difficulty having the time to complete form
  - Employees were told if they work with coordinator, the survey they complete will go to coordinator
  - Are employees going to have 2 hours or 4 hours?

**WWW:** Jeanne and Sue will address this offline.

- Scheduling Problems
  - Members who are working in open labs are not having time for lunch or breaks
- Classification Review:
  - Management shared that they shared with managers about classification study and there were comments from employees about not wanting to do it. Management notified them this is a new process, study, consultant and everybody needs to be encouraged to participate.
  - FUSE shared concern about person reporting to Board is not sitting member of management from this team.

### **A. Consultant**

**WWW:** Mandy going to look into these issues and Yvonne will follow up as well... pending 11-30-05.

## SCMA/Teamsters Negotiations

### Recollections

November 16, 2005

Room A104

2:00-5:00 p.m.

3.0

Classified Supervisory  
Management:  
Teamsters:  
District:

Greg Schneider  
Diane McKnight, Brian Haley  
Ken Akins, Nancy Jones  
Ron Martinez, Doug Smith

1. Check-in: Diane McKnight was the Facilitator for the day. Lonnie Schwenk and George Holt were absent. Ron Martinez had to leave at 2:30 p.m.
2. Off-Agenda
  - Colin Irwin continues to have FUSE dues taken from his paycheck.  
WWW: Doug check with Jeanne Leland and Payroll regarding status and mechanics for not paying dues.
  - Ron reported that the survey of other districts show that CACT director is a contract consultant in ½ the districts and employee in other ½ of districts.  
District's interest:
    - a. Position exist as long as there is funding, with no employee rights outside of grant
    - b. Employment based on satisfactory evaluationsSCMA expressed no problems with this option.
3. Review/adopt agenda/recollections: Reviewed agenda and recollections. There are several WWW's that have had no action.
  - (A) WWW: Millie send list of WWW's.
  - (B) WWW: George to review and consult with District; then get back with Ken (distributed at 10/31/05 meeting)
    - a. Tests for deciding whether the employer had just cause for disciplining an employee (developed by practice)
    - b. Discipline and Discharge (Ken drafted)
    - c. Grievance Procedure (Ken drafted)
    - d. Article 16: Progressive Discipline (from the FUSE agreement)
  - (C) WWW: Lonnie to work with Linda Fisher to draft a sample timesheet that could be used by exempt employees and bring it back to this group.
  - (D) WWW: Ken and George draft article based on diagrams (attached)

**SCMA/Teamsters Negotiations  
Recollections**

**November 28, 2005**

A-104  
2-5:00PM

3-0

Classified Supervisory:  
Management:  
Teamsters:  
District:  
Absent:  
Guest:

Greg Schneider  
72-11 Brian Haley, Diane McKnight 74-28  
Ken Akins  
87-40 Ron Martinez, Doug Smith, George Holt 87-90  
Nancy Jones, Lonnie Schwenk  
Mandy Davies, Sandra Scott 72-11  
19-23

**AGENDA**

**1. Check in**

- Agenda item: Categorically-funded positions in Management
- Move to agenda item regarding District policy of funding categorical positions
- Agreed that 100% categorically-funded positions earn no seniority rights or regular, permanent status that provides for lateral transfer opportunities into District generally-funded positions

Generally-Funded Mgmt. Positions	Fully Funded Specialty Positions 100% "Categorically-Funded"
Associate Deans of Student Services (5% categorical)	CACT
Osher Manager (100% general fund)	Construction Manager Truckee
Police Chief (50% general fund)	SBDC Manager
	Director of Statewide Leadership- SBDC

**2. FUSE Dues (Jeanne Leland, Colin Irwin present for discussion)**

- Colin Irwin is still having FUSE dues taken out of his check
- WWW:** Jeanne Leland to contact FUSE and advise that FUSE deduction is to cease and then contact Payroll to confirm action.

**3. George and Ken to review WWW:**

- (B) **WWW:** George to review and consult with District; then, get back with Ken (distributed at 10/31/05 meeting)
- a. Tests for deciding whether the employer had just cause for disciplining an employee (developed by practice)
  - b. Discipline and Discharge (Ken drafted)
  - c. Grievance Procedure (Ken drafted)
  - d. Article 16: Progressive Discipline (from the FUSE agreement)

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, November 30, 2005  
Time: 1:30 -4:30 pm  
Place: LR 201

3.0

### For the District:

Jeanne Leland\*  
Kaylene Hallberg  
John Bukey (absent)

### For the Union:

Jeff Lloyd (absent)  
Bernard Acuna (absent)  
Sue Keller\*  
Gerri Snell  
Eunis Benecke

\*Chief Negotiator  
Facilitator: Robyn Hargrave

### I. Check In

- a. How are you doing?
- b. Head's Up  
**WWW:** There is a person job shadowing in Health Services.  
Jeanne to find out and report back.
- c. Elephants
- d. Concerns
- e. Rumor Control
- f. Process Check
- g. Identify off-agenda items and decide when to deal with them:
  - 29K
  - Employees annual statements from Payroll
  - 4/10s
  - 90-minute release time
  - Temp advertisement update

### II. Recollections/Agenda

- On 10/14/05 recollections, eliminate sentence in WWW for longevity, "Sue will distribute to all FUSE members"
- Recollections from 11/16 are OK

### III. Issues

- A. Classification Study
  - Consultant will be going to Management Retreat
  - Concern by FUSE that managers understand they are not to "red" mark surveys  
**WWW:** Jeanne will send out memo to managers today 11/30/05
- B. Closed Session Reporting
  - FUSE raised the concern about person reporting to the Board is not a member that is sitting on the management team  
**WWW:** Jeanne will report back 12/7/05
- C. Consultant
  - Stan is not doing backup... Greg is

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, December 7, 2005  
Time: 1:30 - 3:30 pm  
Place: LR 201

20

### For the District:

Jeanne Leland\*

Kaylene Hallberg (absent)

John Bukey

### For the Union:

Jeff Lloyd (absent)

Bernard Acuna (absent)

Sue Keller\*

Gerri Snell

Eunis Benecke

\*Chief Negotiator

Facilitator: Robyn Hargrave

### I. Check In

- a. How are you doing?
- b. Head's Up
- c. Elephants
- d. Concerns
- e. Rumor Control
  - o Questions regarding AFLAC insurance – situation is being reviewed and then info will be communicated. Coverage will continue until people are notified
  - o Hiring committee for Assistant Facility Ops. Director and a Confidential taking notes. Notes should be taken by someone on the hiring committee.
- f. Process Check
- g. Identify off-agenda items and decide when to deal with them:
  - A. Person shadowing in Health Services
    - Jeanne made an attempt at gathering info – still waiting for return call
    - **WWW:** Jeanne to follow up 12-14-05
  - B. Classified Study
    - Consultant is going to Management Retreat
    - Jeanne did send out memo to managers
  - C. Closed Session
    - President of college decides who goes into closed session and report
    - If there is a major issue to be discussed/reported Jeanne will be called in to give a report
  - D. Longevity
    - Jeanne and Sue signed off on grievance
    - **CLOSED**

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, December 14, 2005  
Time: 1:30 –3:30 pm  
Place: LR 201

2.0

### For the District:

Jeanne Leland  
Kaylene Hallberg  
John Bukey

### For the Union:

Jeff Lloyd  
Bernard Acuna (absent)  
Sue Keller\*  
Gerri Snell  
Eunis Benecke

\*Chief Negotiator

Facilitator: Joanne Bodine

- I. Check In
- II. Head's Up, Elephants, Concerns, Rumor Control
- III. Outstanding Issues
  - A. Person "job shadowing" in Health Services.  
He was a student considering a health services career at UCD and shadowed the Nurse Practitioner for 10 hours under volunteer paperwork and is now gone. There was no issue of confidentiality. (item closed)
  - B. Uniforms  
Jeanne spoke with Colin briefly. Some employees currently receive uniforms depending on job duties. Uniforms are not required by code/law. Although discussed, employees are not currently asked to leave boots, jackets, uniforms here. Sierra contract to launder/clean when/as necessary. May companies categorize this type of clothing/apparel as "safety equipment." The specific issue at hand is boots and jackets for Vehicle Maintenance Technicians.  
WWW: Jeanne will speak further with Collin and draft criteria/process.
  - C. Training Needs  
To be continued 1/4/06.  
WWW: Sue will look at matrix to see if other trainings would be appropriate or of interest to classified and will report back by 1/18/06.
  - D. Temporary Employee Advertisements  
An advertisement was placed erroneously by the Sac Bee and there was no response by the public.  
WWW: Jeanne will provide an update as available
  - E. 29K  
Sue discussed with FUSE Executive Board and they want to include those who retired or resigned on or after July 1, 2004 as appropriate based on time worked during the period. This resolves any potential legal issue.
  - F. Employee Annual Statement from Payroll



## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, February 1, 2006  
Time: 1:30 - 4:30 pm  
Place: LR 201

3.0

### For the District:

Jeanne Leland\*  
Kaylene Hallberg

### Guests:

Ron Martinez  
Joyce Lopes

### For the Union:

Jeff Lloyd (absent)  
Bernard Acuna  
Sue Keller\*  
Gerri Snell  
Eunis Benecke

\*Chief Negotiator

Facilitator: John Bukey

- I. Check In  
Eunis will be out from 2/7-2/28
- II. Recollections – approved – no edits.
- III. Head's Up, Elephants, Rumor Control
  - a. Problem Solving – FUSE, with notice to HR (Jeanne will respond), will go directly to the source to discuss concerns and bring back here if necessary. (item closed)
  - b. NCC Childcare Temp – Ron Martinez described the history of the NCC Childcare Center. The Center's preschool occupants are vulnerable with regard to safety. Sue is ok with Administrative Secretary temp while we hire as long as there is a proper assessment of duties. Option – Hire a "rent-a-cop" until duties are defined.  
WWW: Ron will ask Darlene to call Sue to discuss needs.

### Agenda for 2/1/06

Custodian (continued)  
Evaluations (continued)  
Replacement Process - Ron (2:00)  
Evening Stipend  
Article 29  
Student Courier

### IV. Agenda Items

- A. Overtime checks from 1/10/06 were not taxed. Payroll reported to Jeanne that OT was being taxed correctly. PCOE is requiring that payroll change tax coding on OT unless it is an excessive amount (\$1,500+). Staff can increase their deductions on their W4 or wait to pay taxes at year end.  
WWW: Sue will contact Payroll for fact finding, meeting scheduled for 2/13

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, February 22, 2006  
Time: 1:30 – 4:00 pm  
Place: LR 201

2.5

### For the District:

Jeanne Leland\*  
Kaylene Hallberg

### For the Union:

Jeff Lloyd (absent)  
Bernard Acuna (absent)  
Sue Keller\*  
Gerri Snell  
Eunis Benecke (absent)

\*Chief Negotiator

No Facilitator (John absent)

- I. Check In
- II. Recollections – approved – with edits
- III. Head's Up, Elephants, Rumor Control

### Off-Agenda Items (from 2/8/06)

1. Question on Org Chart – discussion of confidential positions
2. Accommodation Issue  
Jeanne reported on new HR process to assess accommodations. Should this be communicated?
3. Article 29  
What are the issues? Loss of pay potential when moving from temporary backfill to permanent replacement.  
WWW: Jeanne, fact-finding, asap

### Off-Agenda Items (from 2/22/06)

4. Temporary Agencies  
IA Chemistry and IA Biology are very difficult positions to recruit both temporarily and permanently. FUSE and the District are discussing contracting out with a temporary agency through the end of the summer until the IA Chemistry can be hired. Currently the position is being recruited and will remain open until filled. The IA Biology needs a leave backfill through the end of the semester. There may be a coverage option with existing staff, removing some duties to temps. This still needs to be assessed.
5. Deans' Council  
Concern that classified employees were not allowed to hear topics reported out on an agenda items titled FUSE Negotiations Update. What would be reported out at this meeting that wasn't already approved by this group? Kaylene reported that this a time for candid discussion among managers. We discussed the possibility of retitling the agenda item for clarification.

**SCMA/Teamsters Negotiations  
Recollections**

**February 27, 2006**

Room A104

1:00-5:00 p.m.

4-0

Classified Supervisory  
Management:  
Teamsters:  
District:

Greg Schneider, Donnie Schwenk

Brian Haley

Ken Akins

Ron Martinez, George Holt

1. Check-in: Diane McKnight, Nancy Jones and Doug Smith were absent.
2. Review of Recollections and WWW's of November 28, 2005 Meeting
  - (2) Issue re: Colin Irwin and FUSE dues taken from his paycheck is closed.
  - (3) George and District met;
  - (4) Management Timesheet: Draft developed for supervisors and educational administrators (exempt employees) to track only whole-day time off. Ron noted a new FLSA ruling gives employers the right to demand hour by hour timesheets from all employees if desired.  
**WWW:** Ron take the proposed timesheet for exempt employees to Joyce Lopes and Doug for final review; if OK, include in "the book."
  - (5) Special Funding Positions – item closed for managers
  - (6) Classification Study has been expanded to include supervisory employees.
3. New Business:
  - (A) Lay-off provisions: George, Nancy and Ken met and discussed need for two layoff provisions – educational administrators and classified supervisors. Drafts were developed independently – Ken drafted provisions for supervisors and George for educational administrators. The drafts were reviewed:
    - Article "X": Layoff Provisions – Educational Administrators – George drafted, using phrases used in court cases. Courts have spent much time defining "lack of work and lack of funds."
      - X.O Delete from first line of section, "or whenever it is advisable in the interests of economy,"
      - X.I No edits
      - X.2 No edits
      - X.2.4 Delete
      - X.3 "Retreat Rights" – move to last section of Article (X.4); delete "(including as a result of the exercise of bumping rights)" from first sentence.  
**WWW:** X.3.2 - George verify language and code are same as SCFA contract and change word "visionary" to "probationary".

## SCMA/Teamsters Negotiations

### Recollections

March 27, 2006

Campus Plaza Room A16

2:30-5:00 p.m.

2.5

Classified Supervisory  
Management:  
Teamsters:  
District:

Greg Schneider, Bonnie Schwenk

Brian Haley

Ken Akins

George Holt, Ron Martinez, Doug Smith

1. Check-in: Diane McKnight and Nancy Jones were absent.
2. Consensus: George, Nancy and Ken will meet in weeks when negotiating teams are not meeting to develop contract language. Developed language will not constitute a commitment by either side. Goal is to have the contract completed by July 1, 2006. Doug would like to review SCMA/District progress with Board of Trustees in May.
3. Review of Recollections and WWW's of 2-27-06 Meeting
  - (a.) George distributed Article "X" – Layoff Provisions - Educational Administrators that had been edited to include the actions from the last meeting.
    - X.2.4 Notice of Board Action – Add the underlined phrase to first line: "As soon as practicable, and in any event no later than March 15 of a given year, following a decision by the Board of Trustees to lay off ....."
    - Include language that notice will be sent to the Union as well.
    - X.2.4.1 Eliminate "[X.2.4 – determination by the Board of Trustees that it is advisable in the interests of economy to reduce the number of educational administrators]." from first paragraph of "form letter".
    - Draft language to set up different layoff procedures for categorically funded educational administrator positions
    - WWW: George make edits and additions to Article "X"
  - (b.) Reviewed proposed article: "Educational Administrators – Length of Individual Employment Appointment"
    - Option of length of contracts
      - 2 years declining to 1 year – never having less than 15 months
      - 2 years declining to 0 – non-rolling – and stagger contracts among ed administrators
    - WWW: Doug and Ron check with the Board, get their comfort level, regarding 2 year contract and Buyout provision
    - WWW: Brian to check with other colleges for their language
  - (c.) WWW: Negotiating team members review the "Discipline and Discharge" and "Grievance Procedure" articles drafted by Ken and distributed on October 31, 2005.

## DISTRICT/FUSE RECOLLECTIONS

Date: Wednesday, March 29, 2006

Time: 2:00-4:00 pm

Place: A 107

2-0

### For the District:

Jeanne Leland\*

Kaylene Hallberg

### For the Union:

Jeff Lloyd (absent)

Bernard Acuna (absent)

Sue Keller\*

Gerri Snell

Eunis Benecke

\*Chief Negotiator

Facilitator, John Bukey (absent)

**NOTE:** We met in A107.

- I. Check In
  - I. Recollections (3/8/06, 3/15/06, 3/29/05)
  - II. Head's Up, Elephants, Rumor Control
- This group agreed that any fact-finding will be held in confidence.

### OFF-AGENDAS

#### 1. Bilingual Stipend

FUSE asking about new phone line in Financial Aid. Are students with bilingual skills answer the line when classified have bilingual skills and would want to receive the bilingual stipend. The contract states that the bilingual stipend is assignable by the District and can be removed at any time. (Article 8, Sec. 10)

### AGENDA for 4/5/06

Evaluations (continued)

Evening Stipend

Article 29

WWWs

Confidentiality & Reporting Out

### AGENDA

#### 1. Request for Nursing Temp

We agreed that Maggie should hire a project-related temp and add a projected schedule. Temp paperwork will be processed with anticipated schedule, including begin and end dates for 05-06 and 06-07 and job functions and grant language that requires clerical assistance.

(item closed)

## SCMA/Teamsters Negotiations

### Recollections

April 17, 2006

A104

3:00-5:10 p.m.

2.2

Classified Supervisory  
Management:  
Teamsters:  
District:

Greg Schneider, Lonnie Schwenk  
Brian Haley, Diane McKnight  
Ken Akins, Nancy Jones  
George Holt, Ron Martinez, Doug Smith

1. Check-in:
2. Review of Recollections and WWW's of 3-27-06 Meeting
  - (a.) WWW: Ron will review revised timesheet with Joyce Lopes
  - (b.) Due to an illness, George, Ken and Nancy were unable to meet since the last session.
  - (c.) Ken drafted "Article X: Layoff Provisions – Classified Supervisors." Article proposes that classified supervisors would have no retreat rights, but would be entitled to a severance package scaled to years of service. District could have the option of offering retreat to another position but retreating would not be a "right." Proposed language is an attempt to mirror Article for Educational Administrators. Section 2.4. specifies that a notice of layoff be sent to the employee and the Union.

Ken suggested reducing steps in the "Appeal Process" by eliminating Section 3.4. and 3.4.1. The District would like to keep the mediation steps. Suggestion made to add option of, by mutual agreement, passing over any steps of the appeal process.

District interest to tie severance package to buyout/buyoff without cause. Although SCMA would sign side-letter for a specific individual if that individual and the District agreed to buyout/buyoff, does not want to institutionalize such a buyout/buyoff process; the article was drafted for "lack of work/lack of funds."

Briefly discussed buckets and where a buyout/buyoff would fall.

District interest to revert to regular contract/Management Handbook and not negotiate severance package.

SCMA interest, then, is to talk about retreat rights as might pertain to Management Handbook.

Classified Supervisor Retreat Rights (regarding lack of work/lack of funds):

## SCMA/Teamsters Negotiations

### Recollections

June 5, 2006

A-104 Administration Building

2:00-5:00 p.m.

30

Classified Supervisory  
Management:  
Teamsters:  
District:

Greg Schneider, Sue Michaels 49.12  
Brian Haley, Diane McKnight  
Ken Akins, Nancy Jones  
George Holt, Ron Martinez, Doug Smith

1. Check-in

2. Review of Recollections and WWW's of 4-17-06 Meeting

- (a.) To finalize changes to the Management & Classified Supervisory Timesheet, Ron asked the Payroll Department to join the meeting. A draft was distributed of the timesheet that will be used to report absences, in 8-hour increments. The timesheet will not be requirement monthly, but submitted only in months when absences occur. The Payroll department is ready to institute this timesheet in July. **Consensus** to use absence-only-timesheet for all exempt employees as of July 1, 2006.
- (b.) Documents that were drafted by Ken and George were distributed, reviewed and discussed:
- Ken distributed draft Article "X" – Layoff Provisions – Classified Supervisors noting that Section 4 had been changed from the previous draft of 4-17-06.
  - George distributed an edited version of the "Discipline and Discharge" document that Ken had distributed in April. Section A. was edited to include the following (underlined): "...suspension without pay (excluding unpaid leaves of absence); a reduction in pay not the result of the layoff procedures; or a discharge ; or a negotiated salary adjustment. ..." Other suggested edits were to strike the word "purge" and replace with the word "seal" in Section B. 1). It was also suggested to add a statement that the employee has "10 days to respond to letter of discipline" as is included in other units' contract document.
  - George distributed copies of FUSE Article 14: Grievance Procedures as a reference document for development of a similar article for SCMA. Discussed "levels" to include in article. District interest is to have a step that includes meeting with the vice president before the matter gets to the President.

WWW: George to draft article to include interests covered in discussion; review with Ken and Nancy; then bring to meeting on June 20, 2006.

**SCMA/Teamsters Negotiations**

**Recollections**

**June 27, 2006**

A-104 Administration Building

2:00-5:00 p.m.

3.0

Classified Supervisory  
Management:  
Teamsters:  
District:

Greg Schneider, Sue Michaels  
Brian Haley, Diane McKnight  
Ken Akins  
George Holt, Ron Martinez, Doug Smith (arrived at 3:00 p.m.)

2.0

1. Check-in  
George asked to carry over until the next meeting his WWW regarding "Lack of Work/Lack of Funds"
2. Review of Recollections  
Recollections of June 20, 2006 approved as recorded.
3. Off-Agenda  
Ron brought for information the issue of Classified accrued comp time and vacation over the maximum carry-over.
4. Review Articles Drafted by Ken, Nancy and George  
The following draft articles were reviewed and accepted as written or edited:  
**CONSENSUS**
  - a. **Recognition** – standard contract language. The intent is to follow the law in this regard. Exhibit A is a list of the SCMA members and needs to be updated.  
WWW: Ron to ask Judy to update SCMA Membership list for George.
  - b. **No Strike/No Lockout** – WWW: Ken will add "no lock out" clause
  - c. **Effect of Agreement** – No edits
  - d. **Forms Manual** – Intent is to post forms on public folders as with other units
  - e. **Preamble** – Correct typo in 5<sup>th</sup> line down - "Supervisories" to "Supervisors"
  - f. **Safety** – Add wording to include "One member at large from each bargaining unit in addition to ex-officio members" to General Safety Committee
  - g. **Prohibition of Sexual Harassment and Complaint Procedure** – No edits
  - h. **Side Letter Review** – Replace word "shall" with "may" in 1<sup>st</sup> line and insert "if any" after word "expiration" in 2<sup>nd</sup> line
  - i. **Support of Agreement** – No edits
  - j. **Savings Provision** – No edits

Reviewed the following articles and agreed to bring back to the next meeting:

- a. **Length of Individual Employment Appointment** – Educational Administrators:  
Discussed some edits and future discussion on tying provision to evaluation  
WWW: George to edit using edit tracking and bring back for review by the group



S: CCD  
 Colle arguing  
 FA 5-2006  
 Dean Council Meetings  
 Schedule 2

DATE	Allbee, Neal	Bray, Kevin	Davies, Mandy	Decourten, Frank	Guevara, Stephanie	Haley, Brian	Hallberg, Kaylene	Jackson, Darlene	Kleinbach, Mary	Martinez, Ron
7/7/2005	0.50		0.50	0.50	0.50		0.50	0.50	0.50	0.50
12/15/2005	0.80	0.80	0.80	0.80	0.80	0.80	0.80	0.80	0.80	
2/16/2006	0.50		0.50	0.50	0.50		0.50	0.50	0.50	
4/20/2006	0.40	0.40	0.40	0.40	0.40		0.40	0.40	0.40	
<b>TOTALS</b>	<b>2.20</b>	<b>1.20</b>	<b>1.70</b>	<b>2.20</b>	<b>2.20</b>	<b>0.80</b>	<b>2.20</b>	<b>1.70</b>	<b>2.20</b>	<b>0.50</b>

DATE	McKnight, Diane	Rantiz, Rick	Scott, Sandra	Siemers, Becky	Smith, Doug	Stephen, Debra	Tsuji, Bill	Volek, John	Walters-Dunlap, Karl	White, Margaret
7/7/2005	0.50		0.50			0.50		0.50		0.50
12/15/2005	0.80	0.80	0.80	0.80		0.80	0.80	0.80	0.80	
2/16/2006	0.50		0.50			0.50	0.50	0.50	0.50	0.50
4/20/2006	0.40	0.40	0.40	0.40	0.40	0.40	0.40	0.40	0.40	
<b>TOTALS</b>	<b>2.20</b>	<b>1.20</b>	<b>2.20</b>	<b>1.20</b>	<b>0.40</b>	<b>1.30</b>	<b>1.70</b>	<b>2.20</b>	<b>1.30</b>	<b>1.00</b>

Verifying Signatures  
for Deans' Council Meetings:  
Time Log for Activities of Mandated Program of  
961/75 COLLECTIVE BARGAINING

Sierra College District (2005-06 Fiscal Year)

DATE:     JULY 7, 2005    

(Please verify your attendance by initialing by your name)

- Neal Allbee (Dean, Nevada County Campus)
- Kevin Bray (Int. Assoc. Dean, Student Services)
- Mandy Davies (Assoc. VP, Student Services)
- Frank DeCourten (Int. VP, Ed.Prog. & Services)
- Ninette Dollesin (Research & Resource Analyst)
- Stephanie Guevara (Dean, Liberal Arts)
- Brian Haley (Dean, Library/LRC)
- Hallberg, Kaylene (Int. Assoc. Dean, Student Services)
- Darlene Jackson (Assoc. Dean, Child Dev. Centers)
- Michelle Kalina (Prof./Coord, Research & Resource Dev.)
- Ron Martinez (Assoc. VP, Human Resources)
- Diane McKnight (Dean, Roseville Gateway Center)
- Rick Rantz (Dean, Tahoe Truckee Center)
- Sandra Scott (Director, Economic Dev.)
- Becky Siemers (Int. Assoc. Dean, Sciences & Math)
- Doug Smith (VP, Finance & Admin.)
- Debra Sutphen (Int. Assoc. Dean, Liberal Arts)
- Laurie Thiers (Research & Resource Analyst)
- Bill Tsuji (Dean, Liberal Arts)
- John Volek (Dean, PE & Athletics)
- Karen Walters Dunlap (Dean, Sciences & Math)
- Margaret White (Assoc. Dean, Nursing)
- Mary Kleinbach (Ex. Sec, EP&S)

    NA    

    KB    

    SD    

    KH    

    DJ    

    RM    

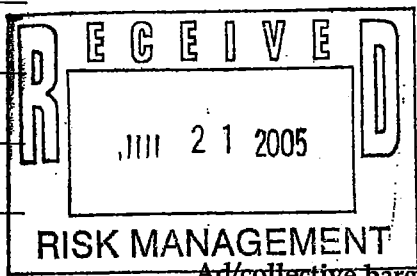
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    DS    

    JV    

    MW      
    MK    

    I. Yuditsky - Taylor Tina Taylor    



Ad/collective bargain form

Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: Sierra Community College Fiscal Year: 2005-2006

**See attached list of signatures/titles of Deans' Council members.**

Employee Name EP&S / Rocklin Exact Position Title \_\_\_\_\_  
Dept. & Location # \_\_\_\_\_ Telephone # \_\_\_\_\_ Work year length 12mo/

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
7/7/05	<b>Deans' Council meeting; agenda item Covered discussions at the negotiating Table for SCFA and FUSE.</b>	<b>SCFA</b>	15 min		
/ /		<b>FUSE</b>	10 min		
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EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature See attached listing Date 7-7-05  
If you have any questions, please contact Mary Kleinbach at 916.781.0543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_

*Mary Kleinbach*

Verifying Signatures  
for Deans' Council Meetings:  
Time Log for Activities of Mandated Program of  
961/75 COLLECTIVE BARGAINING

Sierra College District (2005-06 Fiscal Year)

DATE: December 15, 2005

(Please verify your attendance by initialing by your name)

Neal Allbee (Dean, Nevada County Campus)

Neal Allbee

Kevin Bray (Int. Assoc. Dean, Student Services)

Kevin Bray

Mandy Davies (Assoc. VP, Student Services)

Mandy Davies

Frank DeCourten (Int. VP, Ed.Prog. & Services)

Frank DeCourten

Ninette Dollesin (Research & Resource Analyst)

Ninette Dollesin

Stephanie Guevara (Dean, <sup>Business & Technology</sup> Liberal Arts)

Stephanie Guevara

Brian Haley (Dean, Library/LRC)

Brian Haley

Hallberg, Kaylene (Int. Assoc. Dean, Student Services)

Kaylene Hallberg

Darlene Jackson (Assoc. Dean, Child Dev. Centers)

Darlene Jackson

Michelle Kalina (Prof./Coord, Research & Resource Dev.)

Michelle Kalina

Ron Martinez (Assoc. VP, Human Resources)

Ron Martinez

Diane McKnight (Dean, Roseville Gateway Center)

Diane McKnight

Rick Rantz (Dean, Tahoe Truckee Center)

Rick Rantz

Sandra Scott (Director, Economic Dev.) <sup>Workforce Development</sup>

Sandra Scott

Becky Siemers (Int. Assoc. Dean, Sciences & Math)

Becky Siemers

Doug Smith (VP, Finance & Admin.) <sup>Cont. Educati.</sup>

Doug Smith

Debra Sutphen (Int. Assoc. Dean, Liberal Arts)

Debra Sutphen

Laurie Thiers (Research & Resource Analyst)

Laurie Thiers

Bill Tsuji (Dean, Liberal Arts)

Bill Tsuji

John Volek (Dean, PE & Athletics)

John Volek

Karen Walters Dunlap (Dean, Sciences & Math)

Karen Walters Dunlap

Margaret White (Assoc. Dean, Nursing)

Margaret White

Mary Kleinbach (Ex. Sec, EP&S)

Mary Kleinbach

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Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining

District: Sierra Community College Fiscal Year: 2005-2006

**See attached list of signatures/titles of Deans' Council members.**

Employee Name EP'S / Deans' Council Exact Position Title \_\_\_\_\_  
Dept. & Location # \_\_\_\_\_ Telephone # x2543 Work year length 12mo/

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
12/15/05	<b>Deans' Council meeting; agenda item Covered discussions at the negotiating Table for SCFA and FUSE.</b>	<b>SCFA</b>	15M		
/ /		<b>FUSE</b>	30M		
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EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature See attached listing Date DEC. 15, 2005  
If you have any questions, please contact Mary Kleinbach at 916.781.0543

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to Mary Kleinbach

Verifying Signatures  
for Deans' Council Meetings:  
Time Log for Activities of Mandated Program of  
961/75 COLLECTIVE BARGAINING

Sierra College District (2005-06 Fiscal Year)

DATE: 2-16-06

(Please verify your attendance by initialing by your name)

Neal Allbee (Dean, Nevada County Campus)

Neal Allbee

Kevin Bray (Int. Assoc. Dean, Student Services)

Kevin Bray

Mandy Davies (Assoc. VP, Student Services)

[Signature]

Frank DeCourten (Int. VP, Ed.Prog. & Services)

[Signature]

Ninette Dollesin (Research & Resource Analyst)

[Signature]

Stephanie Guevara (Dean, <sup>Business (Technology)</sup> Liberal Arts)

[Signature]

Brian Haley (Dean, Library/LRC)

[Signature]

Hallberg, Kaylene (Int. Assoc. Dean, Student Services)

K Hallberg

Darlene Jackson (Assoc. Dean, Child Dev. Centers)

[Signature]

Michelle Kalina (Prof./Coord, Research & Resource Dev.)

[Signature]

Ron Martinez (Assoc. VP, Human Resources)

[Signature]

Diane McKnight (Dean, Roseville Gateway Center)

Diane McKnight

Rick Rantz (Dean, Tahoe Truckee Center)

[Signature]

Sandra Scott (Director, Economic Dev.)

Sandra Scott

Becky Siemers (Int. Assoc. Dean, Sciences & Math)

[Signature]

Doug Smith (VP, Finance & Admin.)

[Signature]

Debra Sutphen (Int. Assoc. Dean, Liberal Arts)

Debra SA

Laurie Thiers (Research & Resource Analyst)

[Signature]

Bill Tsuji (Dean, Liberal Arts)

Bill Tsuji

John Volek (Dean, PE & Athletics)

John F. Volek

Karen Walters Dunlap (Dean, Sciences & Math)

[Signature]

Margaret White (Assoc. Dean, Nursing)

Margaret White

Mary Kleinbach (Ex. Sec, EP&S)

Mary Kleinbach

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**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: **Sierra Community College** Fiscal Year: **2005-2006**

**See attached list of signatures/titles of Deans' Council members.**

Employee Name EP: S - Fresno, Em Exact Position Title 12mo/  
 Dept. & Location # 781-0543 Telephone # Work year length

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
2/16/06	<b>Deans' Council meeting; agenda item Covered discussions at the negotiating Table for SCFA and FUSE.</b>	<b>SCFA</b>			
/ /		<b>FUSE</b>	30Min		
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Employee Signature **See attached listing** Date 2-24-06

If you have any questions, please contact **Mary Kleinbach** at **916.781.0543**

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_ to \_\_\_\_\_





**Individual Activities Time Log for Mandated Costs of  
961/75 Collective Bargaining**

District: **Sierra Community College** Fiscal Year: **2005-2006**

**See attached list of signatures/titles of Deans' Council members.**

Employee Name EPS, Rm A102 Exact Position Title \_\_\_\_\_  
 Dept. & Location # \_\_\_\_\_ Telephone # 916 781-0543 12mo/  
 Work year length \_\_\_\_\_

Date	Description of Activities	Barg. Unit	Time	# of copies	Leave Blank
/ /	<b>Deans' Council meeting; agenda item Covered discussions at the negotiating Table for SCFA and FUSE.</b>	<b>SCFA</b>			
/ /		<b>FUSE</b>			
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4/20/06		FUSE	20min		
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**EMPLOYEE CERTIFICATION:** The State of California requires that school district personnel maintain a record of the time spent on mandates in order for the district to receive reimbursement. Your signature on this form certifies your participation in the activity and that you have reported actual time and cost or provided a good faith estimate. This information is used for cost accounting purposes only.

Employee Signature **See attached listing** Date \_\_\_\_\_  
 If you have any questions, please contact **Mary Kleinbach** at **916.781.0543**

PLEASE SUBMIT THIS INFORMATION BY \_\_\_\_\_, to \_\_\_\_\_

Si CCD  
 Collect. Bargaining  
 FY/ 2005-2006  
 Negotiations Omniparty  
 Schedule 3

DATE	Haley, Brian	Leland, Jeanne	Lopes, Joyce	McDermid, Patt	Martinez, Ron	McKnight, Diane	Scott, Sandra
11/7/2005	3.00		3.00	3.00	3.00	3.00	
12/5/2005	3.00		3.00	3.00	3.00	3.00	
2/6/2006		3.00	3.00	3.00	3.00	3.00	3.00
3/14/2006		3.00	3.00	3.00	3.00	3.00	3.00
4/3/2006		3.00	3.00	3.00	3.00	3.00	3.00
<b>TOTALS</b>	<b>6.00</b>	<b>9.00</b>	<b>15.00</b>	<b>6.00</b>	<b>15.00</b>	<b>15.00</b>	<b>9.00</b>

# Omniparty Negotiations

November 7, 2005  
LR 201, 2-5:00PM

30

**Present** – Richard Alman, Wayne Barbee, Jim Forkum, Winsome Jackson, (Patt) McDermid, Jim Weir; Bernard Acuna, Eunis-Benecke, John Lervold, Jeff Lloyd, Sue Keller, Gerri Snell; Ron Martinez, Joyce Lopes, Jeanne Leland; Greg Schneider, Brian Haley, Diane McKnight.  
Neil Bodine, facilitator

## Agenda

1. Check-in, agenda, minutes, process check
  2. Report From Board
  3. Doug Johnson on Compensation Study
  4. Benefit Committee
  5. Constituent Education
- 
- A. Process Issues**
- End at 4:30PM today
- B. Report from the Board Meeting**
- The Board approved in closed session the straw design we proposed and draft formula without the caveat about the bond passage
  - Tomorrow night will be formal ratification
  - The contract language is finished and the two contracts are being modified with 6/30/07 end date
  - The rest of the management contracts are still being negotiated – have separate side letter for management groups that will be ratified
  - Joyce and Linda are meeting with Placer County Treasurer and Assessor regarding understanding the process and effects of basic aid status
  - County is willing to meet with this group to explain Basic Aid
  - Suggestion
    - Each unit have a person involved in the basic aid education Process
    - Someone come to this meeting to give us an overview
    - John for FUSE, Patt for faculty and Lonnie for management
- C. Benefit Committee Report**
- Had JLMC Committee in place for 10 years
  - Proceeded by Omniparty negotiations process when the parties could not agree, restructured to benefits then morphed into the JLMC

# Omniparty Negotiations

December 5, 2005

LR 201, 2-5:00PM

3.0

**Present** - Richard Alman, Wayne Barbee, Jim Forkum, Winsome Jackson, Patt  
8044 McDermid, Jim Weir; Bernard Acuna, Eunis Benecke, John Lervold, Jeff Lloyd,  
Sue Keller, Gerri Snell, Ron Martinez, Joyce Lopez, Greg Schneider, Brian  
7211 Haley Diane McKnight H28 2740 71-13

Neil Bodine, facilitator

## Agenda

1. Check-in, agenda, minutes, process check
2. Next Steps on Comparability Study
3. Calendar
4. Benefits Committee Study
5. Constituent Education
6. Next Steps, Next Agenda, Meeting Evaluation

### A. **Agenda**

- Adopted as amended

### B. **Minutes**

- Approved as submitted

### C. **Process Check**

- Basic Aid Committee meeting this Wednesday

### D. **Comparability Study**

- Board saw the study, questioned little pieces
- Still do not fully understand the consequence of the bucket formula model
- Recognize there are inequities
- Would like to fix it themselves
- Doug Johnson has issued a final report and has gone to the subcommittee
  - Would be good to get feedback regarding their interests related to comparability
  - Maybe in the Retreat
- Comparability Subcommittee: Would like only parts of study to the constituents
- Doug Johnson said he would:
  - Change summary – did but distributed only to the Board and the Omniparty
- Do further work on comparison to American River College/Los Rios
  - Unsure whether done
- Do a chart on action points by college
  - Unsure whether done

# Omniparty Negotiations

February 6, 2006  
LR 201, 2-5:00PM

30

**Present** – Winsome Jackson, Patt McDermid, Jim Weir; Bernard Acuna, Eunis Benecke, John Lervold, Jeff Lloyd, Sue Keller, Gerri Snell, Ron Martinez, Joyce Lopes, Greg Schneider, Diane McKnight, John Bukey, Jeanne Leland, Sandra Scott.

7-2-11

Neil Bodine, facilitator

## Agenda

1. Usual start
- 2a. Change for benefits, etc.
- 2b. CCS Conference
3. How we handle payroll in the future (no retros)
4. Process for staffing in relation to Omniparty
5. At large membership to Omniparty
6. Presidential compensation regarding formula
7. Report from Comparability Subcommittee
8. Constituent education
9. Opting out of benefits

## Omniparty:

- Check-in
- Process ✓ - absent rep – is alternate
  - OK and do they vote?
  - Concerns – up-to-date information?
  - Does consensus model cover concern?
  - Confidentiality?

**CONSENSUS:** Allow voting alternates within consensus model and confidentiality

- Recollections – approved with revisions

## A. Change for Benefits, etc.

- Retiree role with Omniparty and Benefits Subcommittee

### Question: Do they vote?

- Straw Design
- Reaffirm:
  - Retirees will not participate in Omniparty Committee
  - Retirees will participate in the Benefits Committee
  - Benefits Committee is a recommending body
  - Benefits Committee should try to reach consensus; but if they cannot reach consensus, report where they are and rationale

→ Agree on reaffirmation

# Omniparty Negotiations

March 13, 2006  
LR 201, 1-4:00PM

3.0

**Present** – Wayne Barbee, Winsome Jackson, Patt McDermid, Bernard Acuna, Eunis Benecke, John Lervold, Jeff Lloyd, Sue Keller, Gerri Snell; Ron Martinez, Joyce Lopez, Greg Schneider, Diane McKnight, Lonnie Schwenk, Jeanne Leland, Sandra Scott, John Bukey

Neil Bodine, facilitator

## Agenda

1. Check in, Minutes, Agenda, Process Check\*  
\*At large and ad hoc membership in Omniparty
- 2a. Opting out of Benefits – Need to see MOUs and Board Policy
- 2b. Financial Update (include GASB 45)
3. FT Faculty Positions
4. Presidential Compensation
5. Personnel Matter
6. Comparability Study
7. Payroll in the Future
8. Constituent Education
9. Usual Close
  - Next Steps
  - Next Agenda
  - Meeting Evaluation

## **A. Process Check**

1. John Lervold – not a representative of any stakeholder group – has served as a resource.  
**Question:** Continue to participate? In what role? Participation in consensus?  
**Answer:** Continue as a resource to everyone and participation in the consensus. Agreement is specific to John.
2. Next Meetings
  - April 3 in LR 201
  - May 22 in LR 201

## **B. Financial Update**

- Joyce handed out:
  1. 1<sup>st</sup> apportionment for 05-06 (P1) from the Chancellor's Office
  2. The formula outcomes from 05-06 (same figures as last month – just added dates of reports relied up)
  3. 2<sup>nd</sup> apportionment for 04-05 (P2)
  4. Recalculation for 04-05

# Omniparty Negotiations

April 3, 2006

LR 201, 2-5:00PM

30

**Present** – Wayne Barbee, Winsome Jackson, Patt McDermid, Bernard Acuna, Eunis Benecke, John Lervold, Jeff Lloyd, Sue Keller, Gerri Snell; Ron Martinez, Joyce Lopes, Greg Schneider, Diane McKnight, Lonnie Schwenk, Jeanne Leland, Sandra Scott, John Bukey

Neil Bodine, facilitator

## Agenda

1. Check in, minutes, agenda, process check - video, introduction of college to new president
2. Data sharing on comparability
3. Revisit attrition savings
4. Presidential compensation
5. Payroll in future
6. Flow chart process between Omniparty and Strategic Council – what each group has jurisdiction over and how they communicate
7. Constituent education

## A. Process Check

- Question: What would be its purpose?
- Answer: Oral history
- Suggest we look at video as designed so far
- So far just personal recollections
- Had thought about presenting to the Board to give them a historical context
- FUSE is uncomfortable with one person's opinions being included – because he tried to decertify FUSE

### **AGREE: Look at it right now.**

- Comments:
  - Need to eliminate the politically motivated comments
  - The chronological sequence needs to be improved
  - Need the people involved since 5/2004 to speak for that period – need to add more perspectives
  - Would be useful to show to the new president and the Board
  - Would also be useful to have a good quality oral history
  - Also use for the collaborative training project
  - FUSE would prefer that Jory be replaced by Shari
  - Need a historical context as part of the short or long version

Sir CCD  
 Collect. Bargaining  
 FY/ 2005-2006  
 Negotiations Uniparty  
 Schedule 4

DATE	Haley, Brian	Leland, Jeanne	Lopes, Joyce	McDermid, Patt	Martinez, Ron	McKnight, Diane	Schneider, Greg
9/16/2005	3.00	3.00	3.00		3.00		3.00
10/6/2005	3.00		3.00	3.00	3.00	3.00	
<b>TOTALS</b>	<b>6.00</b>	<b>3.00</b>	<b>6.00</b>	<b>3.00</b>	<b>6.00</b>	<b>3.00</b>	<b>3.00</b>



## Formula Negotiations (Uniparty)

September 19, 2005

A-16, 9:00-12:00

3.0

**Present** – Winsome Jackson, Patt McDermid, Jeff Lloyd, Sue Keller, Ron Martinez, Jim Forkum, Richard Alman, Jim Weir, Greg Schneider, Brian Haley, Joyce Lopes, Jeanne Leland, John Bukey, John Lervold, Wayne Barbee

Neil Bodine, facilitator

### Agenda

1. Check-in, agenda, minutes, process check
2. Review redraft of formula
3. Transition and \$900k
4. Next steps
5. Constituent education
6. Next agenda, meeting evaluation

#### **A. Report from Board Meeting**

1. Willing to accept the formula – very concerned about infrastructure
2. Can live with 78/22% split unless the bond fails to pass by the end of 2006, then revert to 77/23%
3. Want to add 6.1.7 – reduction in force (impact negotiable) – move 6.1.7 to 6.1.8  
→ AGREE to (3)
4. Transition
  - 6.12% growth cap
  - 4.75% = deficated growth
  - Think we actually get up to the 6.12 growth cap.
  - Board agreed to budget at 6% growth
  - Board also wanted to set aside \$700,000:
    - IIT
    - Math & Tech Building
    - Sinking fund for new campus growth
    - Post retirement medical fund, GASB 45
  - Leaves \$737,000 unallocated after step and column
  - The formula would not be fully operational until 7/1/06
  - Better to agree that the formula go into effect 7/1/05 and deal with the \$700K as a mutual interest item for '05-'06
  - The \$700,000 would come out of the new growth income bucket on one-time basis → as a mutual interest adjustment
  - So will affect both this year's and next year's income to be used in the future – intends the \$700,000 come from the extra growth \$ above the deficit growth cap.
  - Board has 2 major interests in place:

## Formula Negotiations (Uniparty)

October 6, 2005

A-16, 2-5:00PM

30

**Present** – Richard Alman, Wayne Barbee, Jim Forkum, Winsome Jackson, Patt McDermid, Jim Weir; Bernard Acuna, Eunis Benecke, John Lervold, Jeff Lloyd, Sue Keller, Gerri Snell; Ron Martinez, Joyce Lopes, Jeanne Leland; Greg Schneider, Brian Haley, Diane McKnight, Neil Bodine, facilitator

### Agenda

1. Check-in, agenda, minutes, process check
2. Formula – report on corrections and further simulations
3. Transition & \$900K
- 4a. Constituent education – formula transition
- 4b. How to calculate how people are paid?
- 4c. Report on last JLMC meeting
5. Next steps, next agenda, meeting evaluation

### **A. Formula**

1. John reported on several edits to the finished formula, none of which are substantive
  2. Joyce handed out a simulation of what would have been in effect from 03-04 and will be until 08-09
    - Chart shows what the formula would have generated and what was actually allocated
    - Have overspent personnel side
    - John reviewed Joyce's simulation and suggested some alternative numbers in some categories
    - John's calculation is organized by the formula tables
    - Main differences:
      - How to calculate deficit factor estimate for 03-04
      - Whether to add back in the classified reclassl payments because they have cleared
      - Whether to subtract the payment on the loan – principle and interest
      - The net difference is about \$300,000
- Question: Which numbers to use on Lines 17, 31, 36 & 46?
- Joyce: If we run the formula in 03-04, would have to run at 1%, not 2%, so would only have recouped at \$484K
- Joyce will check the Board minutes to confirm the deficit factor actually used in developing the budget.
- Question: What is the expected reserve based on unaudited actuals?

Sir CCD  
 Collect. Bargaining  
 FY/2005-2006  
 Omniparty Benefits Committee  
 Schedule 5

DATE	Lee, Lawrence	Leland, Jeanne	Lopes, Joyce	McDermid, Patt	Martinez, Ron	Smith, Doug
3/17/2006	1.00	1.00	1.00	1.00	1.00	
4/7/2006	1.50	1.50	1.50	1.50	1.50	1.50
<b>TOTALS</b>	<b>2.50</b>	<b>2.50</b>	<b>2.50</b>	<b>2.50</b>	<b>2.50</b>	<b>1.50</b>

**OMNIPARTY BENEFITS COMMITTEE  
RECOLLECTIONS**

**March 17, 2006 (Meeting #1)**

**LRC 313**

**12:00-1:00**

1.0

**Committee Membership and Attendance:**

All present today unless listed as absent:

FUSE: Sonni Cooper, John Lervold

SCFA: Sean Booth, Patt McDermid

SCMA: Linda Fisher, Lawrence Lee

SCRA: Peter Kolster, Joyce Kelley (alternates will be: Cliff Burns, Lyn Young)

District: Joyce Lopes, Jeanne Leland

Resource and Consultants: Ron Martinez, Kevin Grenz, Dennis Lee (absent)

Joyce opened the first meeting of the newly configured Omniparty Benefits Committee with a brief history of the evolution of the committee and committee's charge. The group reviewed and approved today's agenda.

**1. Benefits Committee Charge**

The charge is to thoroughly evaluate current Health and Welfare benefits and recommend to the Omniparty annually (by end of May) the most appropriate options for the District. The Benefits Committee is a recommending body that should try to reach consensus prior to forwarding recommendations. If consensus cannot be reached, the committee will report to the Omniparty on the various options and their rationale.

**2. Benefits Committee Membership**

Due to the complexity of the subject matter and the importance for consistency of subject matter knowledge, membership terms will be two years/three years during this first year; subsequent membership will be two year terms. Members can be reappointed. Each group will determine among themselves who will have the two or three year appointments. Alternates will be allowed only for the retirees and will not be allowed for other groups. We will strive to reach consensus but if that is not possible, the various opinions will be presented to the Omniparty. **Consensus**

**3. Third Party Administrator**

Joyce introduced Kevin Grenz, of Grenz Insurance. Kevin is currently the District's third party administrator for Health and Welfare benefits. He described his role as consultant to the District: it is similar to Dennis Lee's role and he and his company provides advice and advocacy for employees. With regard to benefits administration, he handles enrollment, eligibility, COBRA, billing, etc. These functions are no longer handled "in-house". He will be a resource to this committee to present ideas regarding dual coverage/opting out, benefit cap, HRAs, HSAs and other options for cost control.

**OMNIPARTY BENEFITS COMMITTEE  
RECOLLECTIONS  
April 7, 2006 (Meeting #2)  
LRC 313  
12:00-1:30PM**

1.5

**Committee Membership and Attendance:**

**FUSE:** Sonni Cooper, John Lervold

**SCFA:** Sean Booth, Patt McDermid

**SCMA:** Linda Fisher, Lawrence Lee

**SCRA:** Peter Kolster, Joyce Kelley (alternates will be Cliff Burns, Lyn Young)

**District:** Joyce Lopes, Jeanne Leland

**Resource and Consultants:** Ron Martinez, Kevin Grenz, Dennis Lee

**Guest:** Doug Smith

**Recorder:** Judy McClymonds

**Truckee:**

- Have not moved over to another vendor
- Still have Blue Shield
- Groups under 50 members, carriers will accept
- Groups over 50 members, carriers can ask medical questions and can deny
- Small groups' out-of-pocket is higher
- If reporting under their own Tax ID #, then could "carve" out to give them a better benefit
- 3 actives, 1 board member, and 3 retirees live in this area
- Whatever we do up in Truckee will apply to retirees too
- Retirees not eligible for carve out because they'll ask medical questions, so would keep the same Blue Shield coverage
- If carve out for actives, they will be age rated

**WWW:** Joyce, Kevin and Jeanne to research the impact on retirees, how AB 1672 applies, can we carve out, and what about NCC?

- If we carve out, would create a precedence
- Ask Blue Shield to go over out-of-network claims
- What about NCC? Be equitable across the board.

**403B / 457B:**

- A hand-out was distributed on the differences of 403Bs and 457Bs and what they are
- Joyce will send out to committee members to get input and edits and then will email to all staff

**Opting Out:**

- As long as no negative impact on rates and benefits, there is no drawback with opting out

**JOINT LABOR MANAGEMENT COMMITTEE  
RECOLLECTIONS**

Date: September 28, 2005  
Time: 12:00-1:00  
Place: LRC 133 Boardroom

*Entire individ.  
Neg subject  
committee*

Voting members present:

District: Ron Martinez  
SCMA: Margaret White, Brian Haley  
FUSE: Sue Keller  
SCFA: Absent

Others

JLMC Benefits Subcommittee: Joyce Lopes (Chair), John Lervold, Sonni Cooper, Sean Booth  
Retirees: Peter Kolster, Joyce Kelley  
Resource: John Bukey (facilitator), Jeanne Leland (recorder), Sue Drennon  
Guests: Paul Brewer

1. **Check in**
2. **Membership and voting** – Discussion item for next meeting
3. **Benefits Subcommittee Recommendations**

Joyce reported that the subcommittee has been meeting for the last 18 months and working with Dennis Lee to explore various options (self-insurance, JPA, carrier) for benefits. After reviewing the options and the bids presented, the subcommittee is recommending that we stay with the carrier approach again for 2006.

Joyce led the group through the 2006 Rate Summary (handout). The subcommittee requested that Dennis provide bid options for the Kaiser early retiree and retiree plans to mirror those of the active employees by changing the office co-pays from \$5 per visit to \$10 per visit. This change did reduce premium costs. Our vision and dental plans are self insured and premiums are based on experience (amount of plan use). No changes were made to the Kaiser active plan, nor to the Harford or US Script plans. The subcommittee is looking at ways to better inform employees of other plan options such as the two Blue Shield catastrophic plans.

**Open enrollment** is from October 1 through 31, 2005. Plan and premium changes will be effective January 1, 2006.

# Formula Negotiations (Tetraparty)

September 2, 2005

A-16, 1:00-5:00

4.0

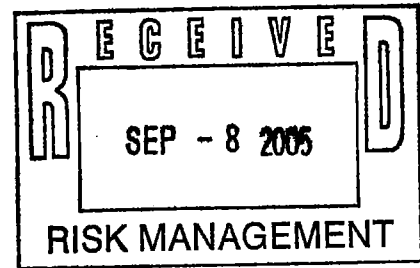
Enter  
NT  
individual.

**Present** – Winsome Jackson, Patt McDermid, Jeff Lloyd, Sue Kellee, Ron Martinez, Jim Forkum, Richard Alman, Jim Weir, Greg Schneider, Brian Halay, Joyce Lopes, Jeanne Leland, John Bukey, John Lervold, Wayne Barbee

Neil Bodine, facilitator

## Agenda

1. Check-in, agenda, minutes, process check
  2. Review 2<sup>nd</sup> draft (formula)
  3. Transition and \$900k
  4. Next steps
  5. Constituent education
  6. Next agenda, meeting evaluation
- A. 2<sup>nd</sup> Draft
- 1<sup>st</sup> - work on substantive language
  - 2<sup>nd</sup> - talk how to deal with clean up issues



- #1 Purpose statement – make it shorter?  
– delete "...the highest quality education for our current and future students as well as..."
- #2.2 Count all positions as of 6/30/05 – by mutual agreement.  
Approved/filled positions – use "budgeted"?
- #2.2.2 "It is a permanent position, filled or funded to be filled, for the current..."

Rewrite 6.2.2.2 & 2.2 (if necessary) to reflect that

- 1) Pull out Board members, student employees, retirees and temps (as intended),
- 2) Determine the balance of \$ and split by unit,
- 3) Then do the division

- #2.3 & 6.2 – right now any savings by attrition get split between all units – can enrich other units at expense of their unit.
- No problem with 2.3.2 within the same unit or 2.3.4 within the unit
  - 2.3.1 & 2.3.3 are problematic because reduces management and Board's discretion to reduce positions in one unit and add in another.
  - 2.3.1 & 2.3.3 delete but on the condition that there be transparency and review of the numbers of positions through the year.
  - Add to 2.3.2 "in the same unit" (clarification needed)

**SCFA/DISTRICT NEGOTIATIONS  
RECOLLECTIONS - Confidential**

*Key  
Certified  
Enter individual*

Date: April 27, 2006  
Time: 2:00-4:30PM  
Location: J-7A

**FOR THE DISTRICT**

John Bukey  
~~Karen Walters Dunlap~~  
~~Ron Martinez\*~~  
~~Diane McKnight~~

**FOR THE ASSOCIATION**

Richard Alman  
Wayne Barbee  
Winsome Jackson  
Patt McDermid\*(facilitator)  
Jim Weir

\*Chief Negotiator  
Joyce Lopes – Resource

**Next Meeting: May 11, 2 p.m., the patio at Hacienda**

**Check-in:**

**AGENDA / RECOLLECTIONS**

**1) Calendar Committee/Compressed Calendar**

The calendar committee will be meet on May 5 to review results of surveys and discuss next steps.

**2) Evaluation Form for Non-Tenured Specially-Funded Faculty**

A DRAFT was reviewed by legal counsel and was distributed for review. Titled: Sierra Joint College District Committee Report Evaluation of Special Non-Tenure Track Faculty. Article 19, Step 6, add a line for Remediation for this classification of faculty.

**WWW:** Karen and Ron to provide a contract revision per above.  
**Continued to Fall 2006.**

**3) Part-Time Faculty Convergence on the Full-Time Faculty Salary Schedule:**

SCFA distributed a proposed pay scale based upon a formula that declares Parity:



**MANDATE REIMBURSEMENT SERVICES**

**PRODUCTIVE HOURLY RATE UPDATE**

Note: Please provide the rates for the FY: 05-06 the missing rates for FY: 04-05.

COMMUNITY COLLEGE DISTRICT		Sierra Joint Community College District		Fiscal Years:	
Name	Title	04-05	05-06		
	AVERAGE ADMINISTRATIVE ASSISTANT	\$ 32.17	\$ 32.82		
	AVERAGE ADMINISTRATIVE SECRETARY	\$ 26.48	\$ 27.01		
	AVERAGE ASSOCIATE DEAN	\$ 67.31	\$ 68.66		
	AVERAGE DEAN	\$ 72.11	\$ 73.56		
	AVERAGE EXECUTIVE SECRETARY	\$ 38.20	\$ 45.45		
	AVERAGE FACULTY	\$ 52.70	\$ 53.75		
	AVERAGE PRESIDENT	\$ 110.30	\$ 112.51		
	AVERAGE VICE PRESIDENT	\$ 83.81	\$ 85.50		
ALLBEE, NEAL	ASSOC. DEAN, PUBLIC SAFETY	\$ 72.11	\$ 78.03		
AMARO, BONNIE	FINANCIAL ASSISTANT SPECIALIST	\$ 33.64	\$ 44.41		
BARNEY, JANICE	ADMINISTRATIVE ASSISTANT	\$ 35.35	\$ 39.35		
BASQUE, JOAN	ADMINISTRATIVE ASSISTANT	\$ 35.35	\$ 37.11		
BATES, MARTY	SR COMPUTER OPERATOR		N/A		
BENSEN, BONNIE	CONSULTANT		\$ 110.00		

**Sierra Ten and Associates**

**MANDATE REIMBURSEMENT SERVICES**

Name	Title	04-05	05-06
BERMAN, NANCY	DEAN OF BUSINESS HIGH TECH. RETIRED		N/A
BIRDSONG, CYNDIE	PAYROLL TECHNICIAN	\$ 32.06	\$ 32.06
BRAZIL, DONNA	SUPERVISOR CAMPUS ADMIN SERVICES	\$ 42.43	\$ 47.01
BRIDGES, KAREN	ADMINISTRATIVE SECRETARY	\$ 29.08	\$ 30.54
BROWN, BARBARA	FINANCIAL ASSISTANT SPECIALIST		\$ 43.27
BROWN, WENDY	GENERAL ASSISTANT IV		\$ 14.40
CLARKSON, STEPHEN	GROUNDNS MAINTENANCE. II	\$ 29.08	\$ 33.58
CONWAY, MARY	FACULTY	\$ 61.00	\$ 73.90
CORBETT, DIANE	ADMINISTRATIVE ASSISTANT I	\$ 35.35	\$ 45.46
COSPER, DONALD	FACULTY RETIRED		N/A
CRANDALL, KOURTNEY	ACCOUNTING ANALYST		\$ 26.93
CULLEY, CHRISTINA	ADMIN ASSISTANT	\$ 35.35	\$ 40.95
CUNNINGHAM, RAY	ASSISTANT DIRECTOR OF PLANT OPERATIONS	\$ 62.69	\$ 56.87
DAVENPORT, SUZANNE	DISTRICT LEARNING COORDIATOR	\$ 67.97	\$ 61.69
DAVIES, MANDY	ASSOCIATE VP DEAN, STUDENT SERVICES	\$ 76.92	\$ 79.23
DECOURTEN, FRANK	INTERIM VP, ED PROG & SERVICES	\$ 72.11	\$ 86.33
DOLLESIN, NINETTE	R&R ANALYST	\$ 45.09	\$ 52.89
DRENNON (ORTEZ), SUE	BENEFITS COORDINATOR	\$ 40.11	\$ 51.58
DUPIUS, JENNIFER	PAYROLL TECHNICIAN	\$ 29.19	\$ 29.69

**MANDATE REIMBURSEMENT SERVICES**

Name	Title	04-05	05-06
ECHAVARRIA, RUTH	ADMINISTRATIVE ASSISTANT	\$ 35.35	\$ 37.11
EPTING-DAVIS, CARLA	ASSOCIATE DEAN, STUDENT SERVICES	\$ 67.31	\$ 54.35
FISHER, SUE	EXECUTIVE SECRETARY/BOARD RECORDER	\$ 40.11	\$ 40.11
FRANKS, KARA	SST-ADMISSIONS	\$	\$ 30.66
GARNER, LUCIA	SST-FINANCIAL SERVICES	\$	\$ 24.63
GIESZELMANN, ED	MATH CENTER COORDINATOR RETIRED	\$ 76.69	N/A
GIFFORD, NORMAN	ADMINISTRATIVE SERVICE TECH.	\$ 30.52	\$ 32.06
GOFF, ARLENE	PURCHASING ASSISTANT	\$ 26.37	\$ 41.23
GREEN, DOLLY	MGR OF DIVERSITY PROGRAMS RESIGNED	\$	N/A
GUEVARA, STEPHANIE	ASSOCIATE DEAN	\$ 72.11	\$ 72.11
HALEY, BRIAN	DEAN, LEARNING RESOURCE CTR	\$ 72.11	\$ 72.11
HALLAM, JENE	ADMINISTRATIVE ASSISTANT	\$ 32.17	\$ 29.80
HAMBLÉN, JOHN	RESIDENCE LIFE SUPERVISOR	\$ 42.43	\$ 40.91
HANAWALT, CAROL	FINANCIAL AID SPECIALIST	\$ 33.64	\$ 39.35
HELWICK, SUE	MANAGER COMPUTER RETIRED	\$	N/A
HOLLWAGER, MARGO	ADMINISTRATIVE ASSISTANT	\$	\$ 23.53
HUTCHING, SHARON	EXECUTIVE SECRETARY	\$ 40.11	\$ 44.64
JACKSON, DARLENE	ASSOCIATE DEAN, CHILD DEVELOPMENT CENTER	\$ 67.31	\$ 67.31
JAMISON, DIANNE	ADMINISTRATIVE TECH SBDC	\$ 30.52	\$ 41.32

## MANDATE REIMBURSEMENT SERVICES

Name	Title	04-05	05-06
JUNG, STEPHEN	FACULTY	\$ 61.00	\$ 64.09
KALINA, MICHELLE	PROFESSOR-RESEARCH	\$ 69.37	\$ 86.73
KELLEY, CRAIG	RESEARCH ANALYST	\$ 45.09	\$ 41.07
KEROHER, KYLEE	SST RESIGNED		\$ 25.02
KLEINBACH, MARY	EXECUTIVE SECRETARY - EP&S	\$ 40.11	\$ 47.76
LANGLEY, AMANDA	FACILITIES OPERATION ASSISTANT		\$ 28.05
LATINKIC, IVAN	SYSTEMS ANALYST		\$ 40.42
LEE, KELLY	PAYROLL TECHNICIAN RESIGNED	\$ 29.19	N/A
LEE, LAWRENCE	DIRECTOR, RISK, FEASIBILITY & LOSS CONTROL	\$ 74.49	\$ 78.57
LELAND, JEAN	EMPLOYEE RELATIONS ANALYST	\$ 46.78	\$ 49.12
LIMPACH, HALEY	STUDENT ASSISTANT		\$ 12.10
LINDE, KAREN	ATHLETIC DIRECTOR	\$ 61.00	\$ 81.53
LOPES, JOYCE	DIRECTOR OF FINANCE	\$ 69.12	\$ 71.13
LUDUTSKY-TAYLOR, TINA	PROVOST NCC	\$ 81.73	\$ 82.70
LYNIN, MORGAN	INTERIM PRESIDENT		\$ 116.68
MACDONALD, JUNE	SST-ADMISSIONS		\$ 35.15
MACKEY, JENNIFER	ASSISTANT PROG MGR-COMMUNITY ED	\$ 38.50	\$ 38.34
MAHONEY, KAREN	ADMINISTRATIVE ASSISTANT		\$ 34.77
MALFA, DIANNE	ADMIN ASSISTANT-CHILD DEVELOPMENT CTRS	\$ 35.35	\$ 41.32

**MANDATE REIMBURSEMENT SERVICES**

Name	Title	04-05	05-06
MARTINDALE, SHIRLEY	ADMIN. SECRETARY III	\$ 29.08	\$ 41.88
MARTINEZ, RON	ASSOC. VP HUMAN RESOURCES	\$ 76.92	\$ 87.40
MCCLYMONDS, JUDY	ADMIN. ASST.	\$ 29.08	\$ 44.64
MCDERMID, PATT	WRITING CENTER COORDINATOR	\$ 76.69	\$ 80.16
McKINNEY, DIANE	ADMIN SECRETARY RESIGNED	\$ 29.08	N/A
McKNIGHT, DIANE	ASSOC. DEAN LIBERAL ARTS	\$ 67.31	\$ 74.28
MCLAUGHLIN, CAROLYN	ACCOUNTING TECHNICIAN	\$ 30.52	\$ 34.22
McVAY, SUSAN (WILLIAMS)	EXECUTIVE ASSISTANT OF PUBLICATION RETIRED		N/A
MICHAELS, SUE	SUPERVISOR-MARKETING/PUBLIC RELATIONS		\$ 49.12
MILLER, PATTY	SST III-SITE		\$ 30.41
MODDER, GAIL	PROJECT MANAGER CUSTOMER SERVICES	\$ 49.12	\$ 56.58
MORGAN, LYNN	VICE PRESIDENT, EP&S	\$ 83.81	
NAVADEREEN, SOUNDERA	PT INSTRUCTOR	\$ 65.86	\$ 67.18
NEWMAN, SHARI (JONES)	TELEPHONE SERVICE TECH. RETIRED	\$ 35.35	N/A
NUNNALLY, DELECIA	ASSOCIATE DEAN, STUDENT SERVICES RESIGNED	\$ 67.31	N/A
OUTMAN, JAN	SST-FINANCIAL SERVICES		\$ 33.49
PASSUELLO, MARCY	PAYROLL COORDINATOR		\$ 29.56
PAULSON, JAN	MANAGER SYSTEMS/PROGRAMS resigned		N/A
PLATZ, ANA	CASHIER		\$ 20.42

**MANDATE REIMBURSEMENT SERVICES**

Name	Title	04-05	05-06
POLAND, BECKY	CURRICULUM ASSISTANT-STUDENT SERVICES	\$ 35.35	\$ 32.58
POWERS, JAN	COMMUNITY ED PROGRAM MANAGER	\$ 54.16	\$ 54.16
PRADO, DOREEN	ADMINISTRATIVE TECHNICIAN	\$ 27.81	\$ 32.05
RAMIREZ, KEVIN	PRESIDENT, RESIGNED	\$ 110.30	N/A
READER, VICKI	ACCOUNTING MANAGER RETIRED		N/A
REHWALD, WENDE	HEALTH SERVICES COORDINATOR	\$ 71.46	\$ 64.49
REID, CORAL	ADMINISTRATIVE SERVICES TECH II	\$ 30.52	\$ 36.16
ROATH, LYNN	ENVIRONMENT HEALTH & SAFETY SPECIALIST	\$ 45.23	\$ 49.70
ROBERTS, MILLIE	EXECUTIVE SECRETARY	\$ 40.11	\$ 50.61
ROCHE, MAUREEN	SHORT TERM/PART TIME		\$ 12.10
SANCHEZ, LUIS	FACULTY	\$ 61.00	\$ 65.26
SCHAEFFER, MARCELLE	PROGRAM MANAGER	\$ 54.16	N/A
SCHNEIDER, GREG	PURCHASING SUPERVISOR	\$ 40.41	\$ 40.41
SCHWENK, LONNIE	CHIEF OF POLICE SERVICES	\$ 40.41	\$ 44.98
SCOTT, SANDRA	DIRECTOR OF ECONOMIC DEVELOPMENT	\$ 72.11	\$ 72.11
SESSIONS, PAM	ADMIN. SERVICE TECH III	\$ 35.35	\$ 39.35
SHIELDS, TRACY	ARTICULATION OFFICE	\$ 40.91	\$ 43.39
SILER, TINA	HR DEVELOPMENT ASSISTANT	\$ 35.35	\$ 36.38
SMALLEY, CRAIG	DATA ADMIN/DIST SYST SEC MGR	\$ 51.58	\$ 66.34

**MANDATE REIMBURSEMENT SERVICES**

Name	Title	04-05	05-06
SMITH, DOUG	VP FINANCE ADMIN.	\$ 83.81	\$ 87.90
SNYDER, SCOTT	TECH SUPPORT SERVICES MANAGER	\$ 56.87	\$ 56.87
STRICKLIN, ANGELA	ADMINISTRATIVE ASSISTANT		\$ 28.05
SUMNER, JOANN	ASSOC DEAN CURRIC. RETIRED		N/A
THIERS, LAURIE	PROJECT MANAGER EP&S	\$ 45.09	\$ 42.19
TSUJI, BILL	DEAN, LIBERAL ARTS RETIRED	\$ 72.11	N/A
VELAZQUEZ, NILO	BOOKSTORE MANAGER RETIRED		N/A
VERMILLION, RHONDA	PAYROLL TECHNICIAN	\$ 29.19	\$ 30.80
VOLEK, JOHN	DEAN-P.E. ATHLETICS	\$ 72.11	\$ 72.11
WALTERS-DUNLAP, KAREN	DEAN, SCIENCE AND MATH	\$ 72.11	\$ 73.09
WASLEY, JUDY	SST-ADMISSIONS		\$ 32.06
WHARFF, BEVERLY	PERSONNEL TECHNICIAN RETIRED		N/A
WHITE, MARGERET	ASSOC DIRECTOR NURSING	\$ 67.31	\$ 70.71
WHITE, PATRICIA	STUDENT FINANCIAL ASST. SPECIALIST		\$ 43.27
WICKSTROM, ROBERT	DIRECTOR OF BUSINESS SERVICES RETIRED		N/A
WILLIAMS, LIZ	SST-ADMISSIONS		\$ 29.08
WILSON, JAMES	INSTRUCTIONAL. ASST. III	\$ 35.35	\$ 43.34
WILSON, WOODROW	DIRECTOR, PLANNING AND RESEARCH	\$ 72.11	\$ 72.11
WITZ, MEGAN	STUDENT ASSISTANT		\$ 12.10





# SixTen and Associates

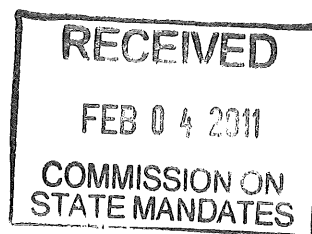
## Mandate Reimbursement Services

KEITH B. PETERSEN, President  
3270 Arena Blvd. Suite 400-363  
Sacramento, CA 95834  
Telephone: (916) 419-7093  
Fax: (916) 263-9701

E-Mail: Kbpsixten@aol.com  
5252 Balboa Avenue, Suite 900  
San Diego, CA 92117  
Telephone: (858) 514-8605  
Fax: (858) 514-8645

February 3, 2011

Drew Bohan, Executive Director  
Commission on State Mandates  
980 Ninth Street, Suite 300  
Sacramento, CA 95814



Re: CSM 09-4425-I-17  
Incorrect Reduction Claim  
Collective Bargaining-REVISED  
Fiscal Years: 2002-03 through 2005-06

Dear Mr.Bohan:

Enclosed is the original and two copies of the above referenced REVISED incorrect reduction claim for Sierra Joint Community College District.

SixTen and Associates has been appointed by the District as its representative for this matter and all interested parties should direct their inquiries to me, with a copy as follows:

Kerri Hester, Director of Finance  
Sierra Joint Community College District  
5000 Rocklin Road  
Rocklin, CA 95677

Sincerely,

A handwritten signature in cursive script, appearing to read "Keith B. Petersen".

Keith B. Petersen

# COMMISSION ON STATE MANDATES

## 1. REVISED INCORRECT REDUCTION

### CLAIM TITLE

961/75 Collective Bargaining

Original Incorrect No. 09-4425-I-17

## 2. CLAIMANT INFORMATION

Sierra Joint Community College District

Kerri Hester, Director of Finance  
Sierra Joint Community College District  
5000 Rocklin Road  
Rocklin, CA 95677  
Voice: 916-660-7603  
Fax: 916-630-4504  
E-mail: khester@sierracollege.edu

## 3. CLAIMANT REPRESENTATIVE INFORMATION

Claimant designates the following person to act as its sole representative in this incorrect reduction claim. All correspondence and communications regarding this claim shall be forwarded to this representative. Any change in representation must be authorized by the claimant in writing, and sent to the Commission on State Mandates.

Keith B. Petersen  
SixTen and Associates  
3270 Arena Blvd., Suite 400-363  
Sacramento, California 95834  
Voice: (916) 419-7093  
Fax: (916) 263-9701  
E-mail: kbpsixten@aol.com

For CSM Use Only

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

**RECEIVED**

FEB 04 2011

COMMISSION ON  
STATE MANDATES

IRC #: 10-4425-I-18

## 4. IDENTIFICATION OF STATUTES OR EXECUTIVE ORDERS

Statutes of 1975, Chapter 961  
Statutes of 1991, Chapter 1213

## 5. AMOUNT OF INCORRECT REDUCTION

Fiscal Year	REVISED Amount of Reduction
2002-03	\$12,116
2003-04	\$0
2004-05	\$0
2005-06	\$0
TOTAL:	\$12,116

## 6. NOTICE OF NO INTENT TO CONSOLIDATE

This claim is not being filed with the intent to consolidate on behalf of other claimants.

Sections 7-9 are attached as follows:

7. Written Detailed Narrative: Pages 1 to 15

8. SCO Results of Review Letters: Exhibit A

9. Controller's Revised Audit Report: Exhibit B

## 10. CLAIM CERTIFICATION

This claim alleges an incorrect reduction of a reimbursement claim filed with the State Controller's Office pursuant to Government Code section 17561. This incorrect reduction claim is filed pursuant to Government Code section 17551, subdivision (d). I hereby declare, under penalty of perjury under the laws of the State of California, that the information in this incorrect reduction claim submission is true and complete to the best of my own knowledge or information or belief.

Kerri Hester, Director of Finance

Kerri G. Hester  
Signature

1/31/11  
Date

1 Claim Prepared by:  
2 Keith B. Petersen  
3 SixTen and Associates  
4 3270 Arena Blvd., Suite 400-363  
5 Sacramento, California 95834  
6 Voice: (916) 419-7093  
7 Fax: (916) 263-9701  
8 E-mail: kbpsixten@aol.com

9  
10 BEFORE THE  
11 COMMISSION ON STATE MANDATES  
12 STATE OF CALIFORNIA

12 **REVISED**  
13 INCORRECT REDUCTION CLAIM OF: ) No. CSM 09-4425-I-17\_  
14 )  
15 ) Chapter 961, Statutes of 1975  
16 ) Chapter 1213, Statutes of 1991  
17 **SIERRA JOINT** )  
18 ) **Collective Bargaining**  
19 **Community College District** )  
20 ) Annual Reimbursement Claims:  
21 Claimant. )  
22 ) Fiscal Year 2002-03  
23 ) Fiscal Year 2003-04  
24 ) Fiscal Year 2004-05  
25 ) Fiscal Year 2005-06

26 INCORRECT REDUCTION CLAIM FILING  
27 PART I. AUTHORITY FOR THE CLAIM

28 The Commission on State Mandates has the authority, pursuant to Government  
29 Code Section 17551(d), to "hear and decide upon a claim by a local agency or school  
30 district filed on or after January 1, 1985, that the Controller has incorrectly reduced  
31 payments to the local agency or school district pursuant to paragraph (2) of subdivision  
32 (d) of Section 17561." Sierra Joint Community College District (hereinafter "District" or  
33 "Claimant") is a school district as defined in Government Code Section 17519. Title 2,  
34 CCR, Section 1185(a), requires the claimant to file an incorrect reduction claim with the

**REVISED Incorrect Reduction Claim of Sierra Joint Community College District  
961/75 Collective Bargaining**

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1 Commission.

2 Original Incorrect Reduction Claim

3 The Controller issued the original final audit report on April 17, 2009. The District  
4 submitted an incorrect reduction claim on August 3, 2009. By letter dated August 10,  
5 2009, the Commission on State Mandates notified the District that the incorrect  
6 reduction claim was received and accepted for filing.

7 Revised Incorrect Reduction Claim

8 The Controller issued a “revised” final audit report on August 25, 2010. The  
9 revised final audit report is attached as Exhibit “B.” The revised audit report constitutes  
10 a new and separate demand for repayment and an adjudication of the claim. The  
11 District also received audit report adjustment letters dated September 9, 2010, for all  
12 four fiscal years, and a “results of review” letter dated September 5, 2010, for FY 2002-  
13 03, all of which are notices of payment action. Copies of these letters are attached as  
14 Exhibit “A.”

15 The Controller’s revised audit report transmittal letter states that the District may  
16 file an amended incorrect reduction claim if the District disagrees with the audit findings.  
17 There is no other dispute resolution process. Title 2, CCR, Section 1185 (b), requires  
18 incorrect reduction claims to be filed no later than three years following the date of the  
19 Controller’s action. There are no regulations specific to “revised” incorrect reduction  
20 claims, but the District infers the same three-year period of limitations would be  
21 applicable for filing a “revised” incorrect reduction claim in response to a “revised” audit

**REVISED** Incorrect Reduction Claim of Sierra Joint Community College District  
 961/75 Collective Bargaining

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report. Thus, this “revised” incorrect reduction claim is timely filed.

**PART II. SUMMARY OF THE CLAIM**

The Controller conducted a field audit of the District’s annual reimbursement claims for the District’s actual costs of complying with the legislatively mandated Collective Bargaining program (Chapter 961, Statutes of 1975; Chapter 1213, Statutes of 1991), for the period July 1, 2002, through June 30, 2006.

Original Final Audit Report Dated April 17, 2009

As a result of the original audit, the Controller determined that \$17,971 of the \$803,036 claimed costs were unallowable:

<u>Fiscal Year</u>	<u>Amount Claimed</u>	<u>Audit Adjustment</u>	<u>SCO Payments</u>	<u>Amount Due &lt;State&gt; District</u>
2002-03	\$322,166	\$17,971	\$322,166	<\$17,971>
2003-04	\$234,496	\$0	\$0	\$234,496
2004-05	\$ 84,769	\$0	\$0	\$84,769
2005-06	<u>\$161,605</u>	<u>\$0</u>	<u>\$0</u>	<u>\$161,605</u>
Totals	\$803,036	\$17,971	\$322,166	\$462,899

The audit report stated that the District was paid \$322,166 for these claims and that \$462,899 is due to the District.

Revised Audit Report Dated August 25, 2010

As a result of the revised audit, the Controller determined that \$12,116 of the \$803,036 claimed costs were unallowable:

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**REVISED Incorrect Reduction Claim of Sierra Joint Community College District  
961/75 Collective Bargaining**

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	<u>Fiscal Year</u>	<u>Amount Claimed</u>	<u>Audit Adjustment</u>	<u>SCO Payments</u>	<u>Amount Due &lt;State&gt; District</u>
1					
2					
3	2002-03	\$322,166	\$12,116	\$304,195	\$ 5,855
4	2003-04	\$234,496	\$0	\$0	\$234,496
5	2004-05	\$ 84,769	\$0	\$0	\$ 84,769
6	2005-06	<u>\$161,605</u>	<u>\$0</u>	<u>\$0</u>	<u>\$161,605</u>
7	Totals	\$803,036	\$12,116	\$304,195	\$486,725

8 The audit report states that the District was paid \$304,195 for these claims and that  
9 \$486,725 is due to the District.

10 **PART III. PREVIOUS INCORRECT REDUCTION CLAIMS**

11 The District filed a previous incorrect reduction claim for this mandate program  
12 on August 3, 2009, in response to the original audit report dated April 17, 2009. This  
13 previous incorrect reduction claim is pending Commission action. This “revised”  
14 incorrect reduction claim incorporates that incorrect reduction claim in its entirety and  
15 supplements that claim to the extent that the findings of the revised final audit report  
16 differ from the original final audit report.

17 **PART IV. BASIS FOR REIMBURSEMENT**

18 No change.

19 **PART V. STATE CONTROLLER CLAIM ADJUDICATION**

20 The Controller conducted an audit of the District’s annual reimbursement claims  
21 for Fiscal Years 2002-03, 2003-04, 2004-05, and 2005-06. The revised audit report  
22 dated August 25, 2010, concluded that \$790,920 of the District’s costs claimed were

1 allowable. A copy of the revised audit report is attached as Exhibit "B."

2 VI. CLAIMANT'S RESPONSE TO THE STATE CONTROLLER

3 No draft revised audit report or other written notice of the pending revised audit  
4 findings was provided to the District. This incorrect reduction claim is the District's  
5 response.

6 PART VII. STATEMENT OF THE ISSUES

7 **Finding 1-- Unallowable salaries and benefits**

8 The original report eliminated \$14,489 in direct costs and \$4,938 in related  
9 indirect costs as unallowable salary and benefit costs. The revised audit report  
10 excluded the reference to indirect cost effect. The District agrees that this does not  
11 affect the direct cost adjustment or the issues presented in the original incorrect  
12 reduction claim.

13 **Finding 2 -- Unallowable Contract Services Costs Claimed**

14 No change.

15 **Finding 3-- Understated indirect cost rates**

16 The revised audit report finds that the District understated indirect costs  
17 because the District did not obtain federal approval for the indirect cost rate used for FY  
18 2002-03 and FY 2003-04, and did not correctly compute the FAM-29 C indirect cost  
19 rate for FY 2004-05 and FY 2005-06. The understated amount in the original audit  
20 report finding was \$94,818. The revised audit report increases the understated amount  
21 by \$8,214 to \$103,032. The revised audit report (p.14) states:

**REVISED Incorrect Reduction Claim of Sierra Joint Community College District  
961/75 Collective Bargaining**

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1 “Subsequent to our final audit report issued April 17, 2009, we revised the  
2 allowable indirect cost rates for FY 2004-05 and FY 2005-06. Our original  
3 calculations excluded allowable depreciation expense. As a result, we revised  
4 the understated indirect costs from \$94,818 to \$103,032. We also corrected the  
5 FY 2002-03 unallowable indirect costs shown in Schedule 1. Our previous final  
6 audit report identified FY 2002-03 indirect costs adjustments in both Findings 1  
7 and 3, and incorrectly calculated the combined effect of the two findings.”

8 The District agrees that the correction to the indirect cost rate made by the revised audit  
9 report does not mitigate any of the issues raised in the original incorrect reduction  
10 claim.

**Indirect Cost Rates Claimed and Audited**

	As		As		Revised	Net
<u>Fiscal Year</u>	<u>Claimed</u>	<u>Difference</u>	<u>Audited</u>	<u>Difference</u>	<u>Audit</u>	<u>Difference</u>
2002-03	35.00%	<13.94%>	21.06%	0	21.06%	<13.94%>
2003-04	39.15%	< 16.99%>	22.16%	0	22.16%	<16.99%>
2004-05	40.90%	< 9.60%>	31.30%	3.96%	35.26%	< 5.64%>
2005-06	35.70%	< 0.73%>	34.97%	3.97%	38.94%	3.24%

18 The indirect cost rates calculated by the District are more consistent from year-  
19 to-year and recognize capital costs in the fiscal years incurred. The District rates are  
20 reasonable and not excessive. The revised audited indirect cost rates for FY 2002-03  
21 and FY 2003-04, where the Controller recognizes neither capital costs nor depreciation  
22 expenses, are significantly different (about 40% less) than the claimed rate. The  
23 revised audited indirect cost rates for FY 2004-05 and FY 2005-06, where the Controller  
24 recognizes depreciation expenses, vary less than the two prior years (3% to 6%), which



**REVISED** Incorrect Reduction Claim of Sierra Joint Community College District  
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1 indicates the accounting timing differences between the CCFS-311 capital costs used  
2 by the District and financial statement depreciation expenses used by the Controller.

3 Because the Controller's method of utilizing depreciation expenses in lieu of  
4 CCFS-311 capital costs is also a reasonable method, the District does not dispute that  
5 choice of methods for FY 2004-05 and FY 2005-06 and will utilize that method in future  
6 annual claims to insure consistency. The District still disputes the audit findings for FY  
7 2002-03 and FY 2003-04 because neither capital costs nor depreciation expenses are  
8 allowed by Controller policy.

9 **OTHER ISSUES**

10 **Amount Paid by The State**

11 This issue was not an audit finding. The payments received from the state are  
12 an integral part of the reimbursement calculation. The original and revised audit reports  
13 changed the payment amount received for FY 2002-03 without a finding in the revised  
14 audit report.

15

	Fiscal Year of Annual Claim			
<u>Amount Paid by the State</u>	<u>2002-03</u>	<u>2003-04</u>	<u>2005-06</u>	<u>2005-06</u>
16 As Claimed	\$ 0	\$ 0	\$ 0	\$ 0
17 Original Audit Report	\$322,166	\$ 0	\$ 0	\$ 0
18 Revised Audit Report	\$304,195	\$ 0	\$ 0	\$ 0

19  
20 The propriety of this adjustment cannot be determined until the Controller states the  
21 reason for the change.

1 **Limit on audited costs**

2           The revised audit report deducts from its findings of "total program costs" the  
3 amounts of \$20,662 for FY 2003-04, \$23,853 for FY 2004-05, and \$54,244 for FY  
4 2005-06, as "less allowable costs that exceed cost claimed." The stated basis for this  
5 limitation on allowable costs is Government Code Section 17561[(d)(3)], cited in  
6 footnote 2 on page 6 of the audit report that states, "that the State will not reimburse  
7 any claim more than one year after the filing deadline." The State has not reimbursed,  
8 that is, made payment on these claims, so that citation does not appear relevant.  
9 Section 17561 (and Section 17568 for late claims) pertains to the timely filing of an  
10 annual claim in order to be eligible for payment, not to the contents of the claim itself.

11           There is no Government Code Section cited that prohibits the Controller from  
12 reimbursement of *audited* costs in excess of claimed costs. Government Code Section  
13 17561(d)(2), as amended by Statutes of 2002, Chapter 1124, effective September 30,  
14 2002, states:

15           "[T]he Controller (A) may audit the records of any local agency or school district  
16 to verify the actual amount of the mandated costs . . . and (C) shall adjust the  
17 payment to correct for any underpayments or overpayments which occurred in  
18 previous fiscal years."

19           The use of the word "shall" makes the adjustment of *both* underpayments and  
20 overpayments mandatory. Thus, the Controller does not have the discretion to  
21 unilaterally determine that it will deny reimbursement for audit adjustments in favor of  
22 the State and simply ignore audit adjustments in favor of the claimants. The Controller,

**REVISED** Incorrect Reduction Claim of Sierra Joint Community College District  
961/75 Collective Bargaining

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1 therefore, has the obligation to pay claimants any unclaimed allowable mandate cost  
2 discovered as the result of an audit.

3 **Statute of limitation for audit**

4 The District asserts that the three-year statute of limitations to commence an  
5 audit for FY 2002-03 expired before the audit entrance conference. The clause in  
6 Government Code Section 17558.5 that delays the commencement of the time for the  
7 Controller to audit to the date of initial payment is void because it is impermissibly  
8 vague. Therefore, the only specific and enforceable time limitation for audit and  
9 adjustment of these claims is three years from the date of filing. The District also  
10 asserts that the revised audit for all four fiscal years was beyond the statute of  
11 limitations when the revised audit was commenced and the revised audit report was  
12 issued on August 25, 2010.

13 Claim Action Dates

14	January 15, 2004	FY 2002-03 annual claim filed by the District
15	January 10, 2005	FY 2003-04 annual claim filed by the District
16	January 17, 2006	FY 2004-05 annual claim filed by the District
17	December 21, 2006	FY 2005-06 annual claim filed by the District
18	January 15, 2007	FY 2002-03 statute of limitations for audit expires
19	April 17, 2007	Audit entrance conference
20	January 10, 2008	FY 2003-04 statute of limitations for audit expires
21	January 17, 2009	FY 2004-05 statute of limitations for audit expires

**REVISED** Incorrect Reduction Claim of Sierra Joint Community College District  
961/75 Collective Bargaining

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- 1 April 17, 2009 Original final audit report issued
- 2 December 21, 2009 FY 2005-06 statute of limitations for audit expires
- 3 August 25, 2010 Revised audit report issued

4 Applicable Time Limitation for Audit

5 Prior to January 1, 1994, no statute specifically governed the statute of  
6 limitations for audits of mandate reimbursement claims. Statutes of 1993, Chapter 906,  
7 Section 2, operative January 1, 1994, added Government Code Section 17558.5 to  
8 establish for the first time a specific statute of limitations for audit of mandate  
9 reimbursement claims:

10 “(a) A reimbursement claim for actual costs filed by a local agency or school  
11 district pursuant to this chapter is subject to audit by the Controller no later than  
12 four years after the end of the calendar year in which the reimbursement claim is  
13 filed or last amended. However, if no funds are appropriated for the program for  
14 the fiscal year for which the claim is made, the time for the Controller to initiate  
15 an audit shall commence to run from the date of initial payment of the claim.”

16 Thus, there are two standards. A funded claim is “subject to audit” for four years after  
17 the end of the calendar year in which the claim was filed. An unfunded claim must have  
18 its audit initiated within four years of first payment.

19 Statutes of 1995, Chapter 945, Section 13, operative July 1, 1996, repealed and  
20 replaced Section 17558.5, changing only the length of the period of limitations:

21 “(a) A reimbursement claim for actual costs filed by a local agency or school  
22 district pursuant to this chapter is subject to audit by the Controller no later than  
23 two years after the end of the calendar year in which the reimbursement claim is  
24 filed or last amended. However, if no funds are appropriated for the program for  
25 the fiscal year for which the claim is made, the time for the Controller to initiate  
26 an audit shall commence to run from the date of initial payment of the claim.”

**REVISED** Incorrect Reduction Claim of Sierra Joint Community College District  
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1 Statutes of 2002, Chapter 1128, Section 14.5, operative January 1, 2003,  
2 amended Section 17558.5 to state:

3 “(a) A reimbursement claim for actual costs filed by a local agency or school  
4 district pursuant to this chapter is subject to the initiation of an audit by the  
5 Controller no later than three years after the ~~end of the calendar year in which~~  
6 the date that the actual reimbursement claim is filed or last amended, whichever  
7 is later. However, if no funds are appropriated or no payment is made to a  
8 claimant for the program for the fiscal year for which the claim is ~~made~~ filed, the  
9 time for the Controller to initiate an audit shall commence to run from the date of  
10 initial payment of the claim.”

11 The annual reimbursement claim for FY 2002-03 is subject to the three-year statute of  
12 limitations established by Chapter 1128, Statutes of 2002 which requires the audit to be  
13 “initiated” within three years of the date the actual claim is filed.

14 The amendment is pertinent because this is the first time that the factual issue of  
15 the date the audit is “initiated” is introduced for mandate programs for which funds are  
16 appropriated. This amendment also means that it is impossible for the claimant to know  
17 when the statute of limitations will expire at the time the claim is filed, which is contrary  
18 to the purpose of a statute of limitations. It allows the Controller’s own unilateral delay,  
19 or failure to make payments from funds appropriated for the purpose of paying the  
20 claims, to control the tolling of the statute of limitations, which is also contrary to the  
21 purpose of a statute of limitations.

22 Statutes of 2004, Chapter 890, Section 18, operative January 1, 2005, amended  
23 Section 17558.5 to state:

24 “(a) A reimbursement claim for actual costs filed by a local agency or school  
25 district pursuant to this chapter is subject to the initiation of an audit by the

**REVISED** Incorrect Reduction Claim of Sierra Joint Community College District  
961/75 Collective Bargaining

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1           Controller no later than three years after the date that the actual reimbursement  
2           claim is filed or last amended, whichever is later. However, if no funds are  
3           appropriated or no payment is made to a claimant for the program for the fiscal  
4           year for which the claim is filed, the time for the Controller to initiate an audit  
5           shall commence to run from the date of initial payment of the claim. In any case,  
6           an audit shall be completed not later than two years after the date that the audit  
7           is commenced.”

8           The annual reimbursement claims for the FY 2003-04, FY 2004-05, and FY 2005-06  
9           are subject to this version of Section 17558.5, which retains the same limitations period  
10          as the prior version, but also adds the requirement that an audit must be completed  
11          within two years of its commencement. *Note that since the original audit report dated*  
12          *April 17, 2009, was issued exactly two years and one day after the entrance conference*  
13          *conducted on April 17, 2007, the original audit was not timely completed and all of the*  
14          *findings for FY 2003-04, FY 2004-05, and FY 2005-06 are void.*

15          Vagueness

16          The two versions of Government Code Section 17558.5 applicable to the four  
17          annual reimbursement claims provide that the time limitation for audit “shall commence  
18          to run from the date of initial payment” if no payment is made. However, this provision is  
19          void because it is impermissibly vague. At the time a claim is filed, the claimant has no  
20          way of knowing when payment will be made or how long the records applicable to that  
21          claim must be maintained. The current four billion-dollar backlog in mandate payments,  
22          which continues to grow every year, could potentially require claimants to maintain  
23          detailed supporting documentation for decades.

24          Therefore, the only specific and enforceable time limitation to commence an

**REVISED** Incorrect Reduction Claim of Sierra Joint Community College District  
961/75 Collective Bargaining

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1 audit is three years from the date the claim was filed. The annual reimbursement  
2 claims for FY 2002-03, FY 2003-04, and FY 2004-05 were past this time period when  
3 the original audit report was issued April 17, 2009. Therefore, all adjustments from the  
4 original audit for these three fiscal years are void and should be withdrawn.

5 The new findings of the revised audit report appear to have been initiated as a  
6 result of the original incorrect reduction claim filed on August 3, 2009. However, the  
7 revised audit was not noticed to the District until the revised audit report was published  
8 on August 25, 2010, which is more than three years after the last annual claim was filed  
9 (FY 2005-06 filed on December 21, 2006). Clearly, the Controller did not initiate these  
10 new findings during the statutory period allowed to initiate the audit for all four fiscal  
11 years that are the subject of this audit. Further, the date of the revised audit report is  
12 more than two years after the commencement of the original audit. Notwithstanding,  
13 the changes made by the Controller in the revised audit report are for substantive  
14 reasons that are now a matter of record for the original incorrect reduction claim and  
15 can be adjudicated by the Commission.

16 PART VIII. RELIEF REQUESTED

17 The District filed its annual reimbursement claims within the time limits  
18 prescribed by the Government Code. The amounts claimed by the District for  
19 reimbursement of the costs of implementing the program imposed by Chapter 961,  
20 Statutes of 1975 (the "Rodda Act"), and Chapter 10.7, Division 4, of Title 1 of the  
21 Government Code (commencing with Section 3540), represent the actual costs incurred

**REVISED** Incorrect Reduction Claim of Sierra Joint Community College District  
961/75 Collective Bargaining

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1 by the District to carry out this program. These costs were properly claimed pursuant to  
2 the Commission's parameters and guidelines. Reimbursement of these costs is  
3 required under Article XIII B, Section 6 of the California Constitution. The Controller  
4 denied reimbursement without any basis in law or fact. The District has met its burden  
5 of going forward on this claim by complying with the requirements of Section 1185, Title  
6 2, California Code of Regulations. Because the Controller has enforced and is seeking  
7 to enforce these adjustments without benefit of statute or regulation, the burden of  
8 proof is now upon the Controller to establish a legal basis for these actions.

9 The District requests that the Commission make findings of fact and law on each  
10 and every adjustment made by the Controller and each and every procedural and  
11 jurisdictional issue raised in this claim, and order the Controller to correct the audit  
12 report findings therefrom.

13 /

14 /

15 /

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20 /

21 /



**REVISED** Incorrect Reduction Claim of Sierra Joint Community College District  
961/75 Collective Bargaining

---

1 PART IX. CERTIFICATION

2 By my signature below, I hereby declare, under penalty of perjury under the laws  
3 of the State of California, that the information in this incorrect reduction claim  
4 submission is true and complete to the best of my own knowledge or information or  
5 belief, and that the attached documents are true and correct copies of documents  
6 received from or sent by the state agency which originated the document.

7 Executed on January 31, 2011, at Rocklin, California, by

8     *Kerri Hester*      
9 Kerri Hester, Director of Finance  
10 Sierra Joint Community College District  
11 5000 Rocklin Road  
12 Rocklin, CA 95677  
13 Voice: 916-660-7603  
14 Fax: 916-630-4504  
15 E-mail: khester@sierracollege.edu

16 APPOINTMENT OF REPRESENTATIVE

17  
18 Sierra Joint Community College District appoints Keith B. Petersen, SixTen and  
19 Associates, as its representative for this incorrect reduction claim.

20     *Kerri Hester*      
21 Kerri Hester, Director of Finance  
22 Sierra Joint Community College District

    1/31/2011      
Date

23 Attachments:

24 Exhibit "A" Controller's audit report adjustment letters dated September 9, 2010

25 Exhibit "B" Controller's Revised Audit Report dated August 25, 2010





**JOHN CHIANG**  
 California State Controller  
 Division of Accounting and Reporting

September 9, 2010

The Honorable Barbara Vineyard  
 President, Board of Trustees  
 Sierra Joint Community College District  
 5000 Rocklin Road  
 Rocklin, CA95677

Re: Collective Bargaining, Fiscal Year 2002/2003

Dear Dr. Hall:

Please be advised that the reimbursement claim filed for the above state mandated program was adjusted per our Division of Audits' letter dated August 25, 2010, as follows:

CLAIMED AMOUNT.....	\$ 322,166.00
CLAIM ADJUSTMENTS	
Field Audit.....	( 12,116.00)
Prior Payments (Ref. MA62182A dated 10/30/2006) .....	(322,166.00)
Prior Collections.....	<u>17,971.00</u>
TOTAL AMOUNT DUE FROM STATE.....	<u>\$ 5,855.00</u>

If you have any questions regarding the above adjustment, please contact Gwen Carlos at (916) 324-2341, or email at [GCarlos@sco.ca.gov](mailto:GCarlos@sco.ca.gov).

Sincerely,

JAY LAL, Manager  
 Local Reimbursement Section

JL/AL/gc

RECEIVED  
 SEP 16 2010  
 SIERRA COLLEGE  
 SUPERINTENDENT/PRESIDENT



JOHN CHIANG  
 California State Controller  
 Division of Accounting and Reporting  
 SEPTEMBER 5, 2010

CC31090  
 00232  
 2010/09/05

BOARD OF TRUSTEES  
 SIERRA JOINT COMM COLL DIST  
 PLACER COUNTY  
 5000 ROCKLIN RD  
 ROCKLIN CA 95677

DEAR CLAIMANT:

RE: COLLECTIVE BARGAINING (CC)

WE HAVE REVIEWED YOUR 2002/2003 FISCAL YEAR REIMBURSEMENT CLAIM FOR THE MANDATED COST PROGRAM REFERENCED ABOVE. THE RESULTS OF OUR REVIEW ARE AS FOLLOWS:

AMOUNT CLAIMED	322,166.00
TOTAL ADJUSTMENTS (DETAILS BELOW)	5,855.00
TOTAL PRIOR PAYMENTS (DETAILS BELOW)	-322,166.00
AMOUNT DUE CLAIMANT	\$ 5,855.00

IF YOU HAVE ANY QUESTIONS, PLEASE CONTACT GWEN CARLOS AT (916) 324-2341 OR IN WRITING AT THE STATE CONTROLLER'S OFFICE, DIVISION OF ACCOUNTING AND REPORTING, P.O. BOX 942850, SACRAMENTO, CA 94250-5875. DUE TO INSUFFICIENT APPROPRIATION, THE BALANCE DUE WILL BE FORTHCOMING WHEN ADDITIONAL FUNDS ARE MADE AVAILABLE.

ADJUSTMENT TO CLAIM:

PRIOR COLLECTIONS	17,971.00	
FIELD AUDIT FINDINGS	- 12,116.00	
TOTAL ADJUSTMENTS		5,855.00
PRIOR PAYMENTS:		
SCHEDULE NO. MA62182A		
PAID 10-30-2006	-322,166.00	
TOTAL PRIOR PAYMENTS		-322,166.00

SINCERELY,

*Ginny Brummels*  
 GINNY BRUMMELS, MANAGER

LOCAL REIMBURSEMENT SECTION  
 P.O. BOX 942850 SACRAMENTO, CA 94250-5875



**JOHN CHIANG**  
 California State Controller  
 Division of Accounting and Reporting

September 9, 2010

The Honorable Barbara Vineyard  
 President, Board of Trustees  
 Sierra Joint Community College District  
 5000 Rocklin Road  
 Rocklin, CA95677

Re: Collective Bargaining, Chapter 961/75  
Program 232, Fiscal Year 2003/2004

Dear Dr. Hall:

Please be advised that the reimbursement claim filed for the above state mandated program was adjusted per our Division of Audits' letter dated August 25, 2010, as follows:

CLAIMED AMOUNT.....	\$ 234,496.00
CLAIM ADJUSTMENT	
Field Audit.....	(       0.00)
TOTAL AMOUNT DUE FROM STATE.....	<u>\$ 234,496.00</u>

If you have any questions regarding the above adjustment, please contact Gwen Carlos at (916) 324-2341, or email at [GCarlos@sco.ca.gov](mailto:GCarlos@sco.ca.gov).

Sincerely,

JAY LAL, Manager  
 Local Reimbursement Section

JL/AL/gc

RECEIVED  
 SEP 16 2010  
 SIERRA COLLEGE  
 SUPERINTENDENT/PRESIDENT

MAILING ADDRESS - P.O. Box 942850, Sacramento, CA 94250



**JOHN CHIANG**  
 California State Controller  
 Division of Accounting and Reporting

September 9, 2010

The Honorable Barbara Vineyard  
 President, Board of Trustees  
 Sierra Joint Community College District  
 5000 Rocklin Road  
 Rocklin, CA95677

Re: Collective Bargaining, Chapter 961/75  
Program 232, Fiscal Year 2004/2005

Dear Dr. Hall:

Please be advised that the reimbursement claim filed for the above state mandated program was adjusted per our Division of Audits' letter dated August 25, 2010, as follows:

CLAIMED AMOUNT.....	\$ 84,769.00
CLAIM ADJUSTMENT	
Field Audit.....	( 0.00)
TOTAL AMOUNT DUE FROM STATE.....	<u>\$ 84,769.00</u>

If you have any questions regarding the above adjustment, please contact Gwen Carlos at (916) 324-2341, or email at [GCarlos@sco.ca.gov](mailto:GCarlos@sco.ca.gov).

Sincerely,

JAY LAL, Manager  
 Local Reimbursement Section

JL/AL/gc

RECEIVED  
 SEP 16 2010  
 SIERRA COLLEGE  
 SUPERINTENDENT/PRESIDENT



**JOHN CHIANG**  
 California State Controller  
 Division of Accounting and Reporting

September 9, 2010

The Honorable Barbara Vineyard  
 President, Board of Trustees  
 Sierra Joint Community College District  
 5000 Rocklin Road  
 Rocklin, CA95677

Re: Collective Bargaining, Chapter 961/75  
Program 232, Fiscal Year 2005/2006

Dear Dr. Hall:

Please be advised that the reimbursement claim filed for the above state mandated program was adjusted per our Division of Audits' letter dated August 25, 2010, as follows:

CLAIMED AMOUNT.....	\$ 161,605.00
CLAIM ADJUSTMENT	
Field Audit.....	( 0.00)
TOTAL AMOUNT DUE FROM STATE.....	<u>\$ 161,605.00</u>

If you have any questions regarding the above adjustment, please contact Gwen Carlos at (916) 324-2341, or email at [GCarlos@sco.ca.gov](mailto:GCarlos@sco.ca.gov).

Sincerely,

JAY LAL, Manager  
 Local Reimbursement Section

JL/AL/gc

RECEIVED  
 SEP 16 2010  
 SIERRA COLLEGE  
 SUPERINTENDENT/PRESIDENT





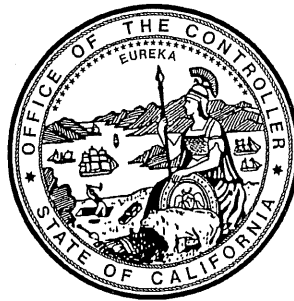
# SIERRA JOINT COMMUNITY COLLEGE DISTRICT

Revised Audit Report

## COLLECTIVE BARGAINING PROGRAM

Chapter 961, Statutes of 1975,  
and Chapter 1213, Statutes of 1991

*July 1, 2002, through June 30, 2006*



JOHN CHIANG  
California State Controller

August 2010



JOHN CHIANG  
California State Controller

August 25, 2010

The Honorable Barbara Vineyard  
President, Board of Trustees  
Sierra Joint Community College District  
5000 Rocklin Road  
Rocklin, CA 95677

Dear Ms. Vineyard:

The State Controller's Office audited the costs claimed by the Sierra Joint Community College District for the legislatively mandated Collective Bargaining Program (Chapter 961, Statutes of 1975, and Chapter 1213, Statutes of 1991) for the period of July 1, 2002, through June 30, 2006.

This revised final report supersedes our previous report dated April 17, 2009. We revised Finding 3 to correct errors in the allowable indirect cost rate calculations for fiscal year (FY) 2004-05 and FY 2005-06. We also revised Finding 1 to exclude the audit adjustment for related indirect costs and identified total unallowable indirect costs in Finding 3. As a result, allowable costs increased by \$5,855 for the audit period.

The district claimed \$803,036 for the mandated program. Our audit disclosed that \$790,920 is allowable and \$12,116 is unallowable. The costs are unallowable because the district claimed unsupported and ineligible costs, and understated allowable indirect costs. The State paid the district \$304,195. Allowable costs claimed exceed the amount paid by \$486,725.

The district previously filed an Incorrect Reduction Claim (IRC) on August 4, 2009. The district may file an amended IRC with the Commission on State Mandates (CSM) based on this revised audit report. The IRC must be filed within three years following the date that we notify you of a claim reduction. You may obtain IRC information at CSM's Web site link at [www.csm.ca.gov/docs/IRCForm.pdf](http://www.csm.ca.gov/docs/IRCForm.pdf).

If you have any questions, please contact Jim L. Spano, Chief, Mandated Cost Audits Bureau, at (916) 323-5849.

Sincerely,

*Original signed by*

JEFFREY V. BROWNFIELD  
Chief, Division of Audits

JVB/sk:vb

cc: Kerri Hester, Director of Finance  
Sierra Joint Community College District  
Doug Smith  
Vice President, Finance and Administration  
Sierra Joint Community College District  
Christine Atalig, Auditor  
Fiscal Services Unit  
California Community Colleges Chancellor's Office  
Thomas Todd, Principal Program Budget Analyst  
Education Systems Unit  
Department of Finance  
Jay Lal, Manager  
Division of Accounting and Reporting  
State Controller's Office

# Contents

## Revised Audit Report

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# Revised Audit Report

## Summary

The State Controller's Office (SCO) audited the costs claimed by the Sierra Joint Community College District for the legislatively mandated Collective Bargaining Program (Chapter 961, Statutes of 1975, and Chapter 1213, Statutes of 1991) for the period of July 1, 2002, through June 30, 2006.

The district claimed \$803,036 for the mandated program. Our audit disclosed that \$790,920 is allowable and \$12,116 is unallowable. The costs are unallowable because the district claimed unsupported and ineligible costs, and understated allowable indirect costs. The State paid the district \$304,195. Allowable costs claimed exceed the amount paid by \$486,725.

## Background

In 1975, the State enacted the Rodda Act (Chapter 961, Statutes of 1975), requiring the employer and employee to meet and negotiate, thereby creating a collective bargaining atmosphere for public school employers. The legislation created the Public Employment Relations Board to issue formal interpretations and rulings regarding collective bargaining under the Act. In addition, the legislation established organizational rights of employees and representational rights of employee organizations, and recognized exclusive representatives relating to collective bargaining.

On July 17, 1978, the Board of Control (now the Commission on State Mandates [CSM]) determined that the Rodda Act imposed a state mandate upon school districts reimbursable under Government Code section 17561.

Chapter 1213, Statutes of 1991, added Government Code section 3547.5, requiring school districts to publicly disclose major provisions of a collective bargaining effort before the agreement becomes binding.

On August 20, 1998, CSM determined that this legislation also imposed a state mandate upon school districts reimbursable under Government Code section 17561. Costs of publicly disclosing major provisions of collective bargaining agreements that districts incurred after July 1, 1996, are allowable.

The seven components of the Collective Bargaining Program are as follows:

- G1-Determining bargaining units and exclusive representatives
- G2-Election of unit representatives
- G3-Costs of negotiations
- G4-Impasse proceedings
- G5-Collective bargaining agreement disclosure
- G6-Contract administration
- G7-Unfair labor practice costs

The program's parameters and guidelines establish the state mandate and define reimbursement criteria. CSM adopted the parameters and guidelines on October 22, 1980, and last amended them on January 27, 2000. In compliance with Government Code section 17558, the SCO issues claiming instructions to assist local agencies and school districts in claiming mandated program reimbursable costs.

**Objective, Scope,  
and Methodology**

We conducted the audit to determine whether costs claimed represent increased costs resulting from the Collective Bargaining Program for the period of July 1, 2002, through June 30, 2006.

Our audit scope included, but was not limited to, determining whether costs claimed were supported by appropriate source documents, were not funded by another source, and were not unreasonable and/or excessive.

We conducted this performance audit under the authority of Government Code sections 12410, 17558.5, and 17561. We did not audit the district's financial statements. We conducted the audit in accordance with generally accepted government auditing standards. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives.

We limited our review of the district's internal controls to gaining an understanding of the transaction flow and claim preparation process as necessary to develop appropriate auditing procedures.

We asked the district's representative to submit a written representation letter regarding the district's accounting procedures, financial records, and mandated cost claiming procedures as recommended by generally accepted government auditing standards. However, the district declined our request.

**Conclusion**

Our audit disclosed instances of noncompliance with the requirements outlined above. These instances are described in the accompanying Revised Summary of Program Costs (Schedule 1) and in the Revised Findings and Recommendations section of this report.

For the audit period, the Sierra Joint Community College District claimed \$803,036 for costs of the Collective Bargaining Program. Our audit disclosed that \$790,920 is allowable and \$12,116 is unallowable. The State paid the district \$304,195. The State will pay allowable costs that exceed the amount paid, totaling \$486,725, contingent upon available appropriations.

**Views of  
Responsible  
Official**

We issued a draft audit report on June 9, 2008. Joyce Lopes, the former Director of Finance, responded by letter dated July 3, 2008 (Attachment). The district stated that it disagrees with the unsupported costs in Finding 1 and the adjustments in Finding 3. The district also stated that it does not dispute the audit results for Findings 1 and 2.

We issued a final audit report on April 17, 2009. Subsequently, we revised Finding 3 to recalculate allowable indirect cost rates for FY 2004-05 and FY 2005-06. We also revised Finding 1 to exclude the audit adjustment for related indirect costs and identified total unallowable indirect costs in Finding 3. As a result, we revised the understated indirect costs identified in Finding 3 from \$94,818 to \$103,032. We advised Kerri Hester, Director of Finance, of the revisions on August 13, 2010.

**Restricted Use**

This report is solely for the information and use of the Sierra Joint Community College District, the California Department of Finance, and the SCO; it is not intended to be and should not be used by anyone other than these specified parties. This restriction is not intended to limit distribution of this report, which is a matter of public record.

*Original signed by*

JEFFREY V. BROWNFIELD  
Chief, Division of Audits

August 25, 2010

**Revised Schedule 1—  
Summary of Program Costs  
July 1, 2002, through June 30, 2006**

Cost Elements	Actual Costs Claimed	Allowable per Audit	Audit Adjustment	Reference <sup>1</sup>
<u>July 1, 2002, through June 30, 2003</u>				
Direct costs:				
Components G1 through G3:				
Salaries and benefits	\$ 94,116	\$ 82,008	\$ (12,108)	Finding 1
Contracted services	118,172	118,172	—	
Subtotals	212,288	200,180	(12,108)	
Less adjusted base-year direct costs	(24,870)	(24,870)	—	
Increased direct costs, G1 through G3	187,418	175,310	(12,108)	
Components G4 through G7:				
Salaries and benefits	56,371	51,748	(4,623)	Finding 1
Contracted services	30,955	29,055	(1,900)	Finding 2
Increased direct costs, G4 through G7	87,326	80,803	(6,523)	
Total increased direct costs	274,744	256,113	(18,631)	
Indirect costs	47,422	53,937	6,515	Finding 3
Total program costs	\$ 322,166	310,050	\$ (12,116)	
Less amount paid by the State		(304,195)		
Allowable costs claimed in excess of (less than) amount paid		\$ 5,855		
<u>July 1, 2003, through June 30, 2004</u>				
Direct costs:				
Components G1 through G3:				
Salaries and benefits	\$ 61,353	\$ 61,353	\$ —	
Contracted services	125,164	125,164	—	
Subtotals	186,517	186,517	—	
Less adjusted base-year direct costs	(25,777)	(25,777)	—	
Increased direct costs, G1 through G3	160,740	160,740	—	
Components G4 through G7:				
Salaries and benefits	19,642	19,642	—	
Contracted services	28,490	28,490	—	
Increased direct costs, G4 through G7	48,132	48,132	—	
Total increased direct costs	208,872	208,872	—	
Indirect costs	25,624	46,286	20,662	Finding 3
Subtotal	234,496	255,158	20,662	
Less allowable costs that exceed costs claimed <sup>2</sup>	—	(20,662)	(20,662)	
Total program costs	\$ 234,496	234,496	\$ —	
Less amount paid by the State		—		
Allowable costs claimed in excess of (less than) amount paid		\$ 234,496		



**Revised Schedule 1 (continued)**

Cost Elements	Actual Costs Claimed	Allowable per Audit	Audit Adjustment	Reference <sup>1</sup>
<u>July 1, 2004, through June 30, 2005</u>				
Direct costs:				
Components G1 through G3:				
Salaries and benefits	\$ 24,892	\$ 26,920	\$ 2,028	Finding 1
Contracted services	42,214	42,214	—	
Subtotals	67,106	69,134	2,028	
Less adjusted base-year direct costs	(26,933)	(26,933)	—	
Increased direct costs, G1 through G3	40,173	42,201	2,028	
Components G4 through G7:				
Salaries and benefits	7,742	7,956	214	Finding 1
Contracted services	30,149	30,149	—	
Increased direct costs, G4 through G7	37,891	38,105	214	
Total increased direct costs	78,064	80,306	2,242	
Indirect costs	6,705	28,316	21,611	Finding 3
Subtotal	84,769	108,622	23,853	
Less allowable costs that exceed costs claimed <sup>2</sup>	—	(23,853)	(23,853)	
Total program costs	\$ 84,769	84,769	\$ —	
Less amount paid by the State		—		
Allowable costs claimed in excess of (less than) amount paid		\$ 84,769		
<u>July 1, 2005, through June 30, 2006</u>				
Direct costs:				
Components G1 through G3:				
Salaries and benefits	\$ 31,294	\$ 31,294	\$ —	
Contracted services	118,720	118,720	—	
Subtotals	150,014	150,014	—	
Less adjusted base-year direct costs	(29,314)	(29,314)	—	
Increased direct costs, G1 through G3	120,700	120,700	—	
Components G4 through G7:				
Salaries and benefits	3,892	3,892	—	
Contracted services	30,762	30,762	—	
Increased direct costs, G4 through G7	34,654	34,654	—	
Total increased direct costs	155,354	155,354	—	
Indirect costs	6,251	60,495	54,244	Finding 3
Subtotal	161,605	215,849	54,244	
Less allowable costs that exceed costs claimed <sup>2</sup>	—	(54,244)	(54,244)	
Total program costs	\$ 161,605	161,605	\$ —	
Less amount paid by the State		—		
Allowable costs claimed in excess of (less than) amount paid		\$ 161,605		

## Revised Schedule 1 (continued)

Cost Elements	Actual Costs Claimed	Allowable per Audit	Audit Adjustment	Reference <sup>1</sup>
<u>Summary: July 1, 2002, through June 30, 2006</u>				
Total increased direct costs	\$ 717,034	\$ 700,645	\$ (16,389)	
Indirect costs	<u>86,002</u>	<u>189,034</u>	<u>103,032</u>	
Subtotal	803,036	889,679	86,643	
Less allowable costs that exceed costs claimed <sup>2</sup>	<u>—</u>	<u>(98,759)</u>	<u>(98,759)</u>	
Total program costs	<u>\$ 803,036</u>	790,920	<u>\$ (12,116)</u>	
Less amount paid by the State		<u>(304,195)</u>		
Allowable costs claimed in excess of (less than) amount paid		<u>\$ 486,725</u>		

<sup>1</sup> See the Revised Findings and Recommendations section.

<sup>2</sup> Government Code section 17561 stipulates that the State will not reimburse any claim more than one year after the filing deadline specified in the SCO's claiming instructions. That deadline has expired for FY 2003-04, FY 2004-05, and FY 2005-06.

# Revised Findings and Recommendations

**FINDING 1—  
Unallowable salaries  
and benefits**

The district claimed unallowable salaries and benefits totaling \$14,489 for the audit period.

We made the audit adjustment based on the following issues:

- The district reported inaccurate productive hourly rates totaling \$6,944 for fiscal year (FY) 2002-03 and FY 2004-05.
- The district claimed mandate-related hours totaling \$4,468 for FY 2002-03 that did not agree with hours it documented by time records.
- The district claimed ineligible contract administration costs related to attendance at a conference totaling \$3,077 for FY 2002-03.

The following table summarizes the unallowable salaries and benefits, and related indirect costs:

	Fiscal Year		Total
	2002-03	2004-05	
Components G1-G3:			
Incorrect productive hourly rate	\$ (7,865)	\$ 2,028	\$ (5,837)
Unsupported hours	(4,243)	—	(4,243)
Total, components G1-G3	(12,108)	2,028	(10,080)
Components G4-G7:			
Incorrect productive hourly rates	(1,321)	214	(1,107)
Unsupported hours	(225)	—	(225)
Ineligible hours	(3,077)	—	(3,077)
Total, components G4-G7	(4,623)	214	(4,409)
Audit adjustment	\$ (16,731)	\$ 2,242	\$ (14,489)

The program’s parameters and guidelines state that the district will be reimbursed for the “increased costs” incurred as a result of compliance with the mandate. Government Code section 17514 states that “costs mandated by the State” means any increased costs that a school district is required to incur.

The parameters and guidelines state that reimbursable contract administration includes adjudication of contract disputes, enforcement of the contract, and training on the negotiated contract. Time spent by employees attending personal development programs, conferences, and workshops is not reimbursable.

Recommendation

We recommend that the district ensure that all costs claimed are allowable and properly supported.

District's ResponseAudit report format errors

The district response identified audit report format errors in which the narrative amounts presented in the finding do not reconcile to the individual amounts presented in the findings' table. In addition, the district offered the following specific comments on the finding:

The District does not dispute this finding at this time.

Finding 1 eliminates \$14,489 as unallowable salary and benefits costs with \$4,938 in related indirect costs, for a total adjustment of \$19,427. The direct cost disallowed of \$14,489 consists of three amounts:

- \$6,944 disallowed due to "inaccurate productive hourly rates";
- \$4,468 disallowed due to hours claimed "that did not agree with hours documented"; and,
- \$3,077 as unallowable costs claimed.

Note that none of the adjustments were made because the costs claimed were excessive or unreasonable.

Productive Hourly Rates

The draft audit report asserts that inaccurate productive hourly rates were reported, resulting in costs that were overstated by \$9,186 for FY 2002-03 and understated by \$2,242 for FY 2004-05, leaving a net audit adjustment of \$6,944. The claims submitted by the district include a list of productive hourly rates for each employee by mandate component. The Controller's productive hourly rate calculation for several employees used different productive hours and benefit rates. The calculations will be reviewed and any continuing dispute will be the subject of the District's incorrect reduction claim.

"Unsupported Hours" Claimed

The draft audit report asserts \$4,468 for "undocumented" salaries and benefits. The documentation deficiencies are characterized in the auditor's detailed workpapers as: "undocumented"; "couldn't find"; "duplicate hours"; "contract interpretation"; "could not locate"; "per [employee's] log"; "addition error?"; and, "didn't sign."

The District concurs that claimed staff time must be documented, but does not concur with the adjustments because the audit report does not provide evidence in support of the qualitative decision the auditor made to disallow specific staff time. In other words, there is no evidence of why the auditor concluded that the costs were insufficiently supported.

The parameters and guidelines essentially require claimants to “show” or “indicate” the costs claimed. While everyone involved in the mandate reimbursement process can regret the imprecision of these instructions, these instructions do not require as a specific condition of reimbursement that claimants provide the individual activity log sheets or time records the Controller has established after the fact as an audit requirement. Instead, the parameters and guidelines specify a “worksheet” supporting the calculation of hourly rates and benefits. The District has complied with the parameters and guidelines by supplying the Controller with worksheets supporting the costs claimed.

#### Unallowable Activities Claimed

The audit disallows \$3,077 claimed for two District administrators to attend a personnel manager’s conference (ACHRO). The District does not dispute this finding at this time.

#### SCO’s Comment

Subsequent to our final audit report issued April 17, 2009, we revised Finding 1 to exclude the audit adjustment for related indirect costs. We identify total unallowable indirect costs in Finding 3. Our recommendation is unchanged. The revision does not affect issues that the district discussed in its draft audit report response or the remainder of our comments below.

#### **Audit Report Format Errors**

The total adjustment identified in the table agrees with the total adjustment identified in the narrative. However, as pointed out in the district’s response to the draft report, the description of the first two lines under Components G1-G3, “Unsupported hours” and “Incorrect productive hourly rates” were switched in error and a \$33 adjustment for unsupported hours under Components G4-G7 was identified in error in the table as ineligible hours. The final report has been updated to eliminate these errors.

#### **Productive Hourly Rates**

The district’s response did not provide any specific objection to this issue.

#### **Unsupported Hours Claimed**

The district believes that worksheets provided with the mandated claims are adequate documentation in support of claimed costs in accordance with the parameters and guidelines. However, Government Code section 17561, subdivision (d)(2), states that the Controller may audit the records of any local agency or school district to verify the actual amount of the mandated costs and may reduce any claim that the Controller determines is excessive and/or unreasonable. The worksheets provided by the district did not support actual costs incurred.

In submitting its FY 2002-03 mandate claim, the district completed Form CB-2, which identified annual hours individual employees spent on reimbursable mandated activities. The district also provided documentation used to report the hours. The submitted documentation did not support 55.4 hours claimed. The unsupported hours were due to the following:

<u>Reason for Unsupported Hours</u>	<u>Hours</u>
Mathematical errors	24.2
Hours not traced to Individual Activity Time Log used to support reported hours	19.3
Meeting minutes showed employee was absent	5.5
Duplicated hours claimed	3.0
Employee's name was not on meeting sign-in sheet	1.6
Agenda did not support hours reported	1.0
No documentation submitted	0.8
<b>Total unsupported hours</b>	<b><u>55.4</u></b>

**Unallowable Activities Claimed**

As noted in the district's response, it did not dispute this adjustment.

**FINDING 2—  
Unallowable contracted  
services costs**

The district claimed unallowable mediator costs totaling \$1,900 for FY 2002-03.

The following table summarizes the contract services audit adjustment:

<u>Contract Services</u>	<u>Fiscal Year 2002-03</u>
Component G6: Mediator costs	\$ (1,900)
<b>Total, component activity G6</b>	<b><u>\$ (1,900)</u></b>

The program's parameters and guidelines state that costs of the mediator related to impasse proceedings is not reimbursed.

Recommendation

We recommend that the district ensure that only eligible claim components are reported for reimbursement.

District's Response

The district does not dispute this finding at this time.

SCO's Comment

The finding and recommendation are unchanged.

**FINDING 3—  
Understated indirect costs**

The district understated allowable indirect costs by \$103,032 for the audit period.

The district developed indirect cost rate proposals (ICRPs) in accordance with Office of Management and Budget (OMB) Circular A-21, (Title 2, Code of Federal Regulations, Part 220). The SCO’s claiming instructions allow the district to use a federally-approved rate prepared in accordance with OMB Circular A-21. However, the district did not obtain federal approval for its ICRPs.

We calculated allowable indirect costs based on the SCO’s Form FAM-29C methodology allowed by the parameters and guidelines and the SCO’s claiming instructions. We applied the allowable indirect cost rates to allowable direct costs according to the SCO’s claiming instructions. The calculated FAM-29C indirect cost rates did not support the rates claimed.

The district applied its indirect cost rates to salaries and benefits. However, the FAM-29C methodology uses total direct costs as the base to calculate indirect cost rates. Therefore, we applied the FAM-29C indirect cost rates to total allowable increased direct costs.

The following table summarizes the understated indirect costs:

	Fiscal Year				Total
	2002-03	2003-04	2004-05	2005-06	
Total allowable increased direct costs	\$256,113	\$208,872	\$ 80,306	\$155,354	
Allowable indirect cost rate	× 21.06%	× 22.16%	× 35.26%	× 38.94%	
Allowable indirect costs	53,937	46,286	28,316	60,495	\$ 189,034
Less claimed indirect costs	(47,422)	(25,624)	(6,705)	(6,251)	(86,002)
Audit adjustment	\$ 6,515	\$ 20,662	\$ 21,611	\$ 54,244	\$ 103,032

The parameters and guidelines state, “Indirect costs may be claimed in the manner described by the State Controller in his claiming instructions.”

For FY 2002-03 and FY 2003-04, the SCO’s claiming instructions state:

A college has the option of using a federally approved rate, utilizing the cost accounting principles from Office of Management and Budget Circular A-21 “Cost Principles for Educational Institutions,” or the Controller’s [FAM-29C] methodology. . . .

For FY 2004-05 forward, the SCO’s claiming instructions state:

A CCD [community college district] may claim indirect costs using the Controller’s methodology (FAM-29C). . . If specifically allowed by a mandated program’s [parameters and guidelines], a district may alternately choose to claim indirect costs using either (1) a federally approved rate prepared in accordance with Office of Management and Budget (OMB) Circular A-21, *Cost Principles for Educational Institutions*; or (2) a flat 7% rate.

### Recommendation

We recommend that the district claim indirect costs based on indirect cost rates computed in accordance with the SCO's claiming instructions. The district must obtain federal approval when it prepares ICRPs in accordance with OMB Circular A-21. Alternatively, the district should prepare its ICRPs using the SCO's Form FAM-29C methodology.

### District's Response

The Controller asserts that the District understated its indirect cost rates in the amount of \$6,515 for FY 2002-03, \$20,662 for FY 2003-04, \$18,431 for FY 2004-05, and \$49,210 for FY 2005-06. The understatement results from two sources other than the \$4,938 in allowable salaries and benefits from Finding 1.

### Depreciation and Capital Costs

The first difference in methods is depreciation expense. The District included the CCSF-11 [*sic*] capital costs in the allocation of overhead costs for all four fiscal years. The Controller did not, but beginning FY 2004-05, the Controller's calculation includes depreciation expense (which are amortized capital costs) and the variance in claimed and audited rate declines.

The draft audit report states:

The district developed indirect cost rate proposals (IRCPs) based on Office of Management and Budget (OMB) Circular A-21 methodology. However, the district did not obtain federal approval for its IRCPs. Therefore, we calculated indirect cost rates using the alternative methodology (FAM-29C) allowed by the SCO's claiming instructions. The calculated FAM-29C indirect cost rates did not support the rates claimed.

The audit report asserts that the District must obtain federal approval when it prepares ICRPs in accordance with OMB Circular A-21. Neither the Commission nor the Controller has ever specified the federal agencies which have the authority to "approve" indirect cost rates. The parameters and guidelines also allow for calculation of the indirect cost rates using the Controller's FAM-29C. The correct forms were used and the claimed amounts were entered at the correct locations.

Both the District's method and the Controller's FAM-29C method utilize the same source document, the CCFS-311 annual financial and budget report required by the State. The difference in the claimed and audited methods is the determination of which of those cost elements are direct costs and which are indirect costs. Indeed, federally "approved" rates that the Controller will accept without further action are "negotiated" rates calculated by the District and submitted for approval, indicating that the process is not an exact science, but rather a determination of the relevance and reasonableness of the costs allocation assumptions made for the method used.



Government Code Section 17561(d)(2) requires the Controller to pay claims, provided that the Controller may audit the records of any school district to verify the actual amount of the mandated costs, and may reduce any claim that the Controller determines is excessive or unreasonable. The Controller is not authorized to simply recalculate the indirect cost rate using its own preferred method, without making the determination that the claimed rate is excessive or unreasonable. In this case, the only determination the Controller made was that the District's rate wasn't federally approved. The District has computed its indirect cost rate utilizing cost accounting principles from the Office of Management and Budget Circular A-21, and the draft audit report has disallowed it without a determination of whether the product of the District's calculation would, or would not, be excessive, unreasonable, or inconsistent with cost accounting principles.

#### Contract Services

The second difference in method is the treatment of contract services costs. The District applied the indirect cost rate to salaries and benefits. The draft audit report indicates that the Controller's calculation includes contract services. This is the primary source of the unclaimed allowable costs of \$91,247 (FY 2003-04 \$20,662; FY 2004-05 \$21,375; and FY 2005-06 \$49,210). The audit identified these allowable costs but does not include them in the amount to be reimbursed.

The Controller dismisses these unclaimed costs in footnote (2) on page 6 of the draft audit report:

Government Code 17561 stipulates that the State will not reimburse any claim more than one year after the filing deadline specified in the SCO's claiming instructions. That deadline has expired for FY 2003-04, FY 2004-05, and FY 2005-06.

This statement is both inaccurate and irrelevant to the issue. The correct citation to Government Code Section 17561(d)(3) is:

In no case may a reimbursement claim be paid if *submitted* more than one year after the filing deadline specified in the Controller's claiming instructions on funded mandates (Emphasis added)

The District is not submitting a new claim for these costs. The findings are the result of the Controller's audit. Further, Government Code Section 17561(d)(2) states:

. . . the Controller (A) may audit (i) the records of any local agency or school district to verify the actual amount of the mandated costs, . . . and (C) shall adjust the payment to correct for any underpayments or overpayments that occurred in previous fiscal years.

The use of the word "shall" makes the adjustment of *both* underpayments and overpayments mandatory. Thus, the Controller does not have the discretion to unilaterally determine that it will require reimbursement for audit adjustments in favor of the State and simply ignore audit adjustments in favor of the claimants. The Controller, therefore, has the obligation to pay claimants any unclaimed allowable mandate costs it discovers as a result of an audit.

SCO's Comment

Subsequent to our draft audit report, we modified the finding by adding additional information from the parameters and guidelines and the SCO's claiming instructions.

Subsequent to our final audit report issued April 17, 2009, we revised the allowable indirect cost rates for FY 2004-05 and FY 2005-06. Our original calculations excluded allowable depreciation expense. As a result, we revised the understated indirect costs from \$94,818 to \$103,032. We also corrected the FY 2002-03 unallowable indirect costs shown in Schedule 1. Our previous final audit report identified FY 2002-03 indirect cost adjustments in both Findings 1 and 3, and incorrectly calculated the combined effect of the two findings.

Our finding previously stated that the parameters and guidelines do not allow districts to use a federally approved rate for FY 2004-05 and FY 2005-06; we deleted this language. In addition, we clarified that the FAM-29C methodology uses total direct costs as the base to calculate indirect cost rates. We also revised our recommendation, which previously stated, "The district must obtain federal approval when it prepares ICRPs in accordance with OMB Circular A-21 for FY 2003-04 and prior years." We deleted the phrase, "for FY 2003-04 and prior years." The revisions do not affect issues that the district discussed in its draft audit report response or the remainder of our comments below.

The CSM and Controller are not responsible for identifying the district's responsible federal agency. OMB Circular A-21 states:

[Cognizant agency responsibility] is assigned to the Department of Health and Human Services (HHS) or the Department of Defense's Office of Naval Research (DOD), normally depending on which of the two agencies (HHS or DOD) provides the more funds to the educational institution for the most recent three years. . . . In cases where neither HHS nor DOD provides Federal funding to an educational institution, the cognizant agency assignment shall default to HHS.

Government Code section 17558.5 requires the district to file a reimbursement claim for actual mandate-related costs. Government Code section 17561, subdivision (d)(2), allows the SCO to audit the district's records to verify actual mandate-related costs and reduce any claim that the SCO determines is excessive or unreasonable. In addition, Government Code section 12410 states, "The Controller shall audit all claims against the state, and may audit the disbursement of any state money, for correctness, legality, and for sufficient provisions of law for payment." Therefore, the district's contention that the SCO is authorized to reduce a claim only if it determines the claim to be excessive or unreasonable is without merit.

However, the SCO did, in fact, conclude that the district's indirect cost rates were excessive. "Excessive" is defined as "exceeding what is usual, proper, necessary, or normal. . . . Excessive implies an amount or degree too great to be reasonable or acceptable. . . ." <sup>1</sup> The district did not obtain federal approval of its ICRPs for the applicable fiscal years. We calculated indirect cost rates using the alternate methodology identified in SCO claiming instructions. This alternate method did not support the rates that the district claimed; thus, the rates claimed were excessive.

Government Code section 17561, subdivision (d)(3), does allow reimbursement claims to be reimbursed if submitted more than one year after the filing deadline. However, only the total costs included in the initial or amended claim may be reimbursed within one year of the filing deadline. Section 17561, subdivision (d)(2), allows the SCO to adjust the payment to correct for any underpayments or overpayments based on allowable costs claimed.

<sup>1</sup> Merriam-Webster's Collegiate Dictionary, Tenth Edition, © 2001.

#### **OTHER ISSUE— Statutes of limitations**

In its response to the draft audit report, the district addressed an issue related to SCO's authority to audit FY 2002-03 claims within the statute of limitations.

#### District's Issue

This was not an audit finding. The District's FY 2002-03 claim was submitted to the Controller's Office on January 15, 2004. Pursuant to Government Code Section 17558.5, this claim is subject to the initiation of an audit only until January 15, 2007. The Controller's audit was not initiated until April 2007. Therefore, audit or adjustment of the claim for FY 2002-03 is barred by the statute of limitations.

#### SCO's Comment

Government Code section 17558.5, subdivision (a), in effect for the audit period states that a reimbursement claim for actual costs filed by a community college district for this mandate is subject to the initiation of an audit by the SCO no later than three years after the date that the actual reimbursement claim is filed or last amended, whichever is later. However, if no funds are appropriated or no payment is made to a claimant for the program for the fiscal year for which the claim is filed, the time for the SCO to initiate an audit shall commence to run from the date of initial payment of the claim.

The district filed its initial FY 2002-03 claims on January 15, 2004, and received the initial claim payment on October 30, 2006. Therefore, this claim was subject to the initiation of an SCO audit until October 30, 2009. The SCO conducted an audit entrance conference on April 17, 2007. Therefore, the SCO initiated an audit within the period that the claim was subject to audit.

**Attachment—  
District's Response to  
Draft Audit Report**

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# SIERRA COLLEGE

*At Sierra College We Facilitate Learning, Inspire Change and Build Community*

CERTIFIED MAIL - RETURN RECEIPT REQUESTED

July 3, 2008

Mr. Jim L. Spano, Chief  
Mandated Costs Audits Bureau  
California State Controller  
Division of Audits  
P.O. Box 942850  
Sacramento, CA 94250-5874

Re: Sierra Joint Community College District  
Chapter 961, Statutes of 1975  
Collective Bargaining  
Fiscal Years 2002-03, 2003-04, 2004-05, and 2005-06

Dear Mr. Spano:

This letter is the response of Sierra Joint Community College District to the letter of Jeffrey V. Brownfield, dated June 9, 2008, and received by the District on June 20, 2008, which transmits a draft copy of your audit report of the District's Collective Bargaining annual reimbursement claims, for the period of July 1, 2002 through June 30, 2006.

#### **Audit Report Format Errors**

The draft audit report fails to adequately disclose the amounts adjusted by reason or fiscal year. This information had to be reconciled to detail information provided at the exit conference. The amounts summarized by reason in Finding 1 of the draft audit report narrative cannot be reconciled with the detail schedule directly below. First, it appears that the line items under Components G1-G3 are incorrectly labeled. The amounts listed as "unsupported hours" (<\$7,865> for FY 2002-03 and \$2,028 for FY 2004-05) can be traced to adjustments attributed to "incorrect productive hourly rates" in schedules provided at the exit conference. Second, the amounts listed for both "unsupported hours" (once the line item labels are corrected) and "ineligible hours" on

• 5000 Rocklin Road • Rocklin CA 95677 • Tel. 916-624-3333 •

the detail schedule do not correspond to the amounts listed for these items in the preceding paragraph.

### **Finding 1 Unallowable salary and benefit costs**

The District does not dispute this finding at this time.

Finding 1 eliminates \$14,489 as unallowable salary and benefits costs with \$4,938 in related indirect costs, for a total adjustment of \$19,427. The direct cost disallowed of \$14,489 consists of three amounts:

- \$6,944 disallowed due to "inaccurate productive hourly rates";
- \$4,468 disallowed due to hours claimed "that did not agree with hours documented"; and,
- \$3,077 as unallowable costs claimed.

Note that none of the adjustments were made because the costs claimed were excessive or unreasonable.

#### Productive Hourly Rates

The draft audit report asserts that inaccurate productive hourly rates were reported, resulting in costs that were overstated by \$9,186 for FY 2002-03 and understated by \$2,242 for FY 2004-05, leaving a net audit adjustment of \$6,944. The claims submitted by the district include a list of productive hourly rates for each employee by mandate component. The Controller's productive hourly rate calculation for several employees used different productive hours and benefit rates. The calculations will be reviewed and any continuing dispute will be the subject of the District's incorrect reduction claim.

#### "Unsupported Hours" Claimed

The draft audit report asserts \$4,468 for "undocumented" salaries and benefits. The documentation deficiencies are characterized in the auditor's detailed workpapers as: "undocumented"; "couldn't find"; "duplicate hours"; "contract interpretation"; "could not locate"; "per [employee's] log"; "addition error?"; and, "didn't sign."

The District concurs that claimed staff time must be documented, but does not concur with the adjustments because the audit report does not provide evidence in support of the qualitative decision the auditor made to disallow specific staff time. In other words, there is no evidence of why the auditor concluded that the costs were insufficiently supported.

The parameters and guidelines essentially require claimants to "show" or "indicate" the costs claimed. While everyone involved in the mandate reimbursement process can regret the imprecision of these instructions, these instructions do not require as a specific condition of reimbursement that claimants provide the individual activity log

sheets or time records the Controller has established after the fact as an audit requirement. Instead, the parameters and guidelines specify a "worksheet" supporting the calculation of hourly rates and benefits. The District has complied with the parameters and guidelines by supplying the Controller with worksheets supporting the costs claimed.

#### Unallowable Activities Claimed

The audit disallows \$3,077 claimed for two District administrators to attend a personnel manager's conference (ACHRO). The District does not dispute this finding at this time.

#### **Finding 2 Unallowable contracted services costs**

Finding 2 disallows \$1,900 in contract services for mediator services. The District does not dispute this finding at this time.

#### **Finding 3 Understated indirect cost rates claimed**

The Controller asserts that the District understated its indirect cost rates in the amount of \$6,515 for FY 2002-03, \$20,662 for FY 2003-04, \$18,431 for FY 2004-05, and \$49,210 for FY 2005-06. The understatement results from two sources other than the \$4,938 in allowable salaries and benefits from Finding 1.

#### Depreciation and Capital Costs

The first difference in methods is depreciation expense. The District included the CCSF-11 capital costs in the allocation of overhead costs for all four fiscal years. The Controller did not, but beginning FY 2004-05, the Controller's calculation includes depreciation expense (which are amortized capital costs) and the variance in claimed and audited rate declines.

The draft audit report states:

The district developed indirect cost rate proposals (IRCPs) based on Office of Management and Budget (OMB) Circular A-21 methodology. However, the district did not obtain federal approval for its IRCPs. Therefore, we calculated indirect cost rates using the alternative methodology (FAM-29C) allowed by the SCO's claiming instructions. The calculated FAM-29C indirect cost rates did not support the rated claimed.

The audit report asserts that the District must obtain federal approval when it prepares ICRPs in accordance with OMB Circular A-21. Neither the Commission nor the Controller has ever specified the federal agencies which have the authority to "approve" indirect cost rates. The parameters and guidelines also allow for calculation of the

indirect cost rate using the Controller's FAM -29C. The correct forms were used and the claimed amounts were entered at the correct locations.

Both the District's method and the Controller's FAM-29C method utilize the same source document, the CCFS-311 annual financial and budget report required by the State. The difference in the claimed and audited methods is the determination of which of those cost elements are direct costs and which are indirect costs. Indeed, federally "approved" rates that the Controller will accept without further action are "negotiated" rates calculated by the District and submitted for approval, indicating that the process is not an exact science, but rather a determination of the relevance and reasonableness of the costs allocation assumptions made for the method used.

Government Code Section 17561(d)(2) requires the Controller to pay claims, provided that the Controller may audit the records of any school district to verify the actual amount of the mandated costs, and may reduce any claim that the Controller determines is excessive or unreasonable. The Controller is not authorized to simply recalculate the indirect cost rate using its own preferred method, without making the determination that the claimed rate is excessive or unreasonable. In this case, the only determination the Controller made was that the District's rate wasn't federally approved. The District has computed its indirect cost rate utilizing cost accounting principles from the Office of Management and Budget Circular A-21, and the draft audit report has disallowed it without a determination of whether the product of the District's calculation would, or would not, be excessive, unreasonable, or inconsistent with cost accounting principles.

#### Contract Services

The second difference in method is the treatment of contract services costs. The District applied the indirect cost rate to salaries and benefits. The draft audit report indicates that the Controller's calculation includes contract services. This is the primary source of the unclaimed allowable costs of \$91,247 (FY 2003-04 \$20,662; FY 2004-05 \$21,375; and FY 2005-06 \$49,210). The audit identified these allowable costs but does not include them in the amount to be reimbursed.

The Controller dismisses these unclaimed costs in footnote (2) on page 6 of the draft audit report:

Government Code 17561 stipulates that the State will not reimburse any claim more than one year after the filing deadline specified in the SCO's claiming instructions. That deadline has expired for FY 2003-04, FY 2004-05, and FY 2005-06.

This statement is both inaccurate and irrelevant to the issue. The correct citation to Government Code Section 17561(d)(3) is:



In no case may a reimbursement claim be paid if *submitted* more than one year after the filing deadline specified in the Controller's claiming instructions on funded mandates. (Emphasis added)

The District is not submitting a new claim for these costs. The findings are the result of the Controller's audit. Further, Government Code Section 17561(d)(2) states:

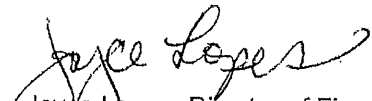
... the Controller (A) may audit (i) the records of any local agency or school district to verify the actual amount of the mandated costs, ... and (C) shall adjust the payment to correct for any underpayments or overpayments that occurred in previous fiscal years.

The use of the word "shall" makes the adjustment of *both* underpayments and overpayments mandatory. Thus, the Controller does not have the discretion to unilaterally determine that it will require reimbursement for audit adjustments in favor of the State and simply ignore audit adjustments in favor of the claimants. The Controller, therefore, has the obligation to pay claimants any unclaimed allowable mandate costs it discovers as the result of an audit.

#### Statute of Limitations

This was not an audit finding. The District's FY 2002-03 claim was submitted to the Controller's Office on January 15, 2004. Pursuant to Government Code Section 17558.5, this claim is subject to the initiation of an audit only until January 15, 2007. The Controller's audit was not initiated until April 2007. Therefore, audit or adjustment of the claim for FY 2002-03 is barred by the statute of limitations.

Sincerely,



Joyce Lopes, Director of Finance  
Sierra Joint Community College District

**State Controller's Office  
Division of Audits  
Post Office Box 942850  
Sacramento, CA 94250-5874**

**<http://www.sco.ca.gov>**

S07-MCC-043

## COMMISSION ON STATE MANDATES

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November 14, 2014

Mr. Keith B. Petersen  
 SixTen & Associates  
 P.O. Box 340430  
 Sacramento, CA 95834-0430

Ms. Jill Kanemasu  
 State Controller's Office  
 Accounting and Reporting  
 3301 C Street, Suite 700  
 Sacramento, CA 95816

*And Parties, Interested Parties, and Interested Persons (See Mailing List)*

Re: **Draft Proposed Decision, Schedule for Comments, and Notice of Hearing**  
*Collective Bargaining and Collective Bargaining Agreement Disclosure*  
 09-4425-I-17 and 10-4425-I-18  
 Government Code Sections 3540-3549.9  
 Statutes 1975, Chapter 961; Statutes 1991, Chapter 1213  
 Fiscal Years 2002-2003 through 2005-2006  
 Sierra Joint Community College District, Claimant

Dear Mr. Petersen and Ms. Kanemasu:

The draft proposed decision for the above-named matter is enclosed for your review and comment.

### Written Comments


Written comments may be filed on the draft proposed decision by **December 5, 2014**. You are advised that comments filed with the Commission are required to be simultaneously served on the other interested parties on the mailing list, and to be accompanied by a proof of service. However, this requirement may also be satisfied by electronically filing your documents. Please see <http://www.csm.ca.gov/dropbox.shtml> on the Commission's website for instructions on electronic filing. (Cal. Code Regs., tit. 2, § 1181.3.)

If you would like to request an extension of time to file comments, please refer to section 1187.9(a) of the Commission's regulations.

### Hearing

This matter is set for hearing on **Friday, January 23, 2015**, at 10:00 a.m., State Capitol, Room 447, Sacramento, California. The proposed decision will be issued on or about January 9, 2015. Please let us know in advance if you or a representative of your agency will testify at the hearing, and if other witnesses will appear. If you would like to request postponement of the hearing, please refer to section 1187.9(b) of the Commission's regulations.

Sincerely,

  
 Heather Halsey  
 Executive Director

**ITEM \_\_**

**INCORRECT REDUCTION CLAIM**

**DRAFT PROPOSED DECISION**

Government Code Sections 3540-3549.9

Statutes 1975, Chapter 961; Statutes 1991, Chapter 1213

*Collective Bargaining and Collective Bargaining Agreement Disclosure*

Fiscal Years 2002-2003 through 2005-2006

09-4425-I-17 and 10-4425-I-18

Sierra Joint Community College District, Claimant

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**EXECUTIVE SUMMARY**

**Overview**

This analysis addresses two consolidated incorrect reduction claims (IRCs) filed by Sierra Joint Community College District (claimant) regarding reductions made by the State Controller's Office (Controller) to reimbursement claims for fiscal years 2002-2003 through 2005-2006 under the *Collective Bargaining and Collective Bargaining Agreement Disclosure* program.

The following issues are in dispute in this IRC:

- The statutory deadlines applicable to audits;
- Unallowable costs related to salaries and benefits;
- Whether underclaimed costs are required to be paid in favor of a local government claimant in excess of the amount claimed;

*Collective Bargaining and Collective Bargaining Agreement Disclosure Mandates*

On July 17, 1978, the Board of Control, predecessor to the Commission on State Mandates (Commission), found that Statutes 1975, chapter 961 imposed a reimbursable state mandate. On March 26, 1998, the Commission adopted a second test claim decision on Statutes 1991, chapter 1213. Parameters and guidelines for the two programs were consolidated on August 20, 1998, and were amended on January 27, 2000.

At the time the reimbursement claims at issue were prepared and submitted to the Controller, the amended parameters and guidelines, adopted on January 27, 2000, were applicable. These parameters and guidelines authorize reimbursement for costs incurred to comply with sections 3540 through 3549.1 of the Government Code, and "regulations promulgated by the Public Employment Relations Board," including:

- Determination of appropriate bargaining units for representation and determination of the exclusive representation and determination of the exclusive representatives;

- Elections and decertification elections of unit representatives are reimbursable in the event the Public Employment Relations Board determines that a question of representation exists and orders an election held by secret ballot;
- Negotiations: reimbursable functions include – receipt of exclusive representative’s initial contract proposal, holding of public hearings, providing a reasonable number of copies of the employer’s proposed contract to the public, development and presentation of the initial district contract proposal, negotiation of the contract, reproduction and distribution of the final contract agreement;
- Impasse proceedings, including mediation, fact-finding, and publication of the findings of the fact-finding panel;
- Collective bargaining agreement disclosure before the adoption of the agreement by the governing body;
- Contract administration and adjudication of contract disputes either by arbitration or litigation, including grievances and administration and enforcement of the contract; and
- Unfair labor practice adjudication process and public notice complaints.<sup>1</sup>

### **Procedural History**

On June 9, 2008, the Controller issued its draft audit report for the fiscal years at issue. On July 3, 2008, the claimant notified the Controller that it was disputing some of the proposed adjustments. On April 17, 2009, the Controller issued its final audit report for fiscal years 2002-2003 through 2005-2006.<sup>2</sup> On August 4, 2009, the claimant submitted the first of these consolidated IRCs, which was numbered 09-4425-I-17.<sup>3</sup> On August 25, 2010, the Controller issued a revised final audit report.<sup>4</sup> On February 4, 2011, the claimant submitted the second of these consolidated IRCs, numbered 10-4425-I-18.<sup>5</sup> On November 14, 2014, Commission staff issued a draft proposed decision on the consolidated IRC.

### **Commission Responsibilities**

Government Code section 17561(b) authorizes the Controller to audit the claims filed by local agencies and school districts and to reduce any claim for reimbursement of state-mandated costs that the Controller determines is excessive or unreasonable.

Government Code Section 17551(d) requires the Commission to hear and decide a claim that the Controller has incorrectly reduced payments to the local agency or school district. If the Commission determines that a reimbursement claim has been incorrectly reduced,

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<sup>1</sup> Exhibit A, Incorrect Reduction Claim, page 24 (Exhibit B to the IRC, Parameters and Guidelines amended January 27, 2000).

<sup>2</sup> Exhibit A, Incorrect Reduction Claim 09-4425-I-17, at p. 8.

<sup>3</sup> Exhibit A, Incorrect Reduction Claim 09-4425-I-17, at p. 2.

<sup>4</sup> Exhibit B, Incorrect Reduction Claim 10-4425-I-18, at p. 4.

<sup>5</sup> Exhibit B, Incorrect Reduction Claim 10-4425-I-18, at p. 1.

section 1185.9 of the Commission’s regulations requires the Commission to send the statement of decision to the Controller and request that the costs in the claim be reinstated.

The Commission must review questions of law, including interpretation of parameters and guidelines, de novo, without consideration of conclusions made by the Controller in the context of an audit. The Commission is vested with exclusive authority to adjudicate disputes over the existence of state-mandated programs within the meaning of article XIII B, section 6.<sup>6</sup> The Commission must also interpret the Government Code and implementing regulations in accordance with the broader constitutional and statutory scheme. In making its decisions, the Commission must strictly construe article XIII B, section 6 and not apply it as an “equitable remedy to cure the perceived unfairness resulting from political decisions on funding priorities.”<sup>7</sup>

With regard to the Controller’s audit decisions, the Commission must determine whether they were arbitrary, capricious, or entirely lacking in evidentiary support. This standard is similar to the standard used by the courts when reviewing an alleged abuse of discretion of a state agency.<sup>8</sup>

The Commission must also review the Controller’s audit in light of the fact that the initial burden of providing evidence for a claim of reimbursement lies with the claimant.<sup>9</sup> In addition, section 1185.2(c) of the Commission’s regulations requires that any assertions of fact by the parties to an IRC must be supported by documentary evidence. The Commission’s ultimate findings of fact must be supported by substantial evidence in the record.<sup>10</sup>

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<sup>6</sup> *Kinlaw v. State of California* (1991) 54 Cal.3d 326, 331-334; Government Code sections 17551, 17552.

<sup>7</sup> *County of Sonoma*, supra, 84 Cal.App.4th 1264, 1280, citing *City of San Jose v. State of California* (1996) 45 Cal.App.4th 1802, 1817.

<sup>8</sup> *Johnston v. Sonoma County Agricultural* (2002) 100 Cal.App.4th 973, 983-984. See also *American Bd. of Cosmetic Surgery, Inc. v. Medical Bd. of California* (2008) 162 Cal.App.4th 534, 547.

<sup>9</sup> *Gilbert v. City of Sunnyvale* (2005) 130 Cal.App.4th 1264, 1274-1275.

<sup>10</sup> Government Code section 17559(b), which provides that a claimant or the state may commence a proceeding in accordance with the provisions of section 1094.5 of the Code of Civil Procedure to set aside a decision of the Commission on the ground that the Commission’s decision is not supported by substantial evidence in the record.

## Claims

The following chart provides a brief summary of the claims and issues raised and staff's recommendation.

Issue	Description	Staff Recommendation
Statutory deadline to initiate the audit of claimant's 2002-2003 through 2005-2006 reimbursement claims.	At the time the underlying reimbursement claims were filed, Government Code section 17558.5 stated: "A reimbursement claim for actual costs filed by a local agency or school district pursuant to this chapter is subject to the initiation of an audit by the Controller no later than three years after the date that the actual reimbursement claim is filed or last amended, whichever is later. However, if no funds are appropriated or no payment is made to a claimant for the program for the fiscal year for which the claim is filed, the time for the Controller to initiate an audit shall commence to run from the date of initial payment of the claim." Claimant argues that tolling the deadline in the case of a claim for which no funds are appropriated or no payment is made is void for vagueness. Therefore, claimant asserts that the first sentence, which relies on the filing date of the claim only, controls, and the audit of its fiscal year 2002-2003 claim, filed on January 13, 2004, was therefore not timely, because it was not initiated on or before January 13, 2007.	<i>The audit was timely initiated.</i> — Staff presumes that the plain language of section 17558.5 is valid and enforceable, and finds that the because the fiscal year 2002-2003 reimbursement claim was not paid until October 30, 2006, the statutory deadline to initiate an audit was tolled until October 30, 2009. The audit was initiated no later than April 17, 2007, and is therefore timely initiated as to all subject fiscal years.
Statutory deadline to complete the audits.	As of January 1, 2005, section 17558.5 also provided: "In any case, an audit shall be completed not later than two years after the date that the audit is commenced."  The claimant argues that based on the initiation date of April 17, 2007, an audit report completed on or after April 17, 2009 is not timely.	<i>The original final audit report was timely completed, but the revised audit report was not timely</i> – Staff finds that the audit was initiated on April 17, 2007, and completed on April 17, 2009, exactly two years after the date commenced. However, the revised audit, issuing August 25, 2010, was not timely, because it was completed later than two years after the audit was commenced.

Reduction of salaries and benefits claimed based on asserted inaccurate productive hourly rates.	The claimant asserts that the Controller reduced salaries and benefits claimed in fiscal year 2002-2003 based on a determination that the claimant provided inaccurate productive hourly rates, but the Controller did not provide any explanation or evidence to support its determination.	<i>This reduction is incorrect because it is entirely lacking in evidentiary support</i> – Staff finds that the Controller failed to provide any evidence in the record of the reasons for the reduction, and its factual assertions that productive hourly rates were “inaccurate” must be supported by evidence in the record.
Recalculation based on asserted flaws in the development of indirect cost rates.	The claimant asserts that the Controller’s recalculation of indirect costs claimed was arbitrary, capricious, or entirely lacking in evidentiary support, because the Controller did not articulate a factually accurate and enforceable reason to recalculate indirect costs. Claimant further argues that upon recalculation, the Controller is required to pay the claimant for the underclaimed amount of indirect costs, and the Controller cannot unilaterally determined that it will not adjust the payment.	<i>Commission has no jurisdiction where there has not been a reduction</i> – Staff finds that even if the Controller had no legally supportable reason to recalculate the claimant’s indirect costs, the result of the recalculation was a determination that the claimant had underclaimed its indirect costs, and therefore there is no reduction over which the Commission can take jurisdiction.

**Staff Analysis**

Staff finds that the original audit report was timely initiated and timely completed, but that the revised audit report was not timely completed. Government Code section 17558.5 provides that if no funds are appropriated “or no payment is made to a claimant...the time for the Controller to initiate an audit [three years] shall commence to run from the date of initial payment of the claim.”<sup>11</sup> Here, the claimant’s fiscal year 2002-2003 claim was first paid October 30, 2006, while the remaining years were not paid until at least September 9, 2010. Therefore, the time period subject to audit, for the earliest of the relevant claim years, was extended until October 30, 2009, and the audit was initiated April 17, 2007. The claimant asserts that the provision of section 17558.5 that tolls the deadline to initiate an audit in the case no payment is made to a claimant is void because it is vague and ambiguous. Staff finds that the Commission is required to presume the statute is valid and enforceable under article III, section 3.5. Staff therefore concludes that the original audit was timely initiated.

Section 17558.5 also requires that an audit be completed “not later than two years after the date that the audit is commenced.” Based on the April 17, 2007 entrance conference, the April 17,

<sup>11</sup> Government Code section 17558.5 (Stats. 2002, ch. 1128, (AB 2834)).



2009 audit report (the first “final” audit report) was timely completed, but the “revised final audit report” issued August 25, 2010, fell outside the two year completion requirement, and was therefore not timely. Based on the foregoing, staff concludes that the first “final” audit report was timely initiated and timely completed, but the revised audit report was not timely completed, in accordance with section 17558.5. Nevertheless, the Commission may take official notice of the revised audit report to the extent that it resolves any disputed issues, or mitigates the amounts in dispute in the claimant’s favor.

Next, the claimant alleges that the Controller incorrectly reduced costs claimed for salaries and benefits, by \$6,944. The Controller recalculated the productive hourly rates claimed and found that salaries and benefits were overstated in fiscal year 2002-2003 by \$9,186; and understated in fiscal year 2004-2005 by \$2,242. The claimant states that the Controller has not explained this adjustment, but neither has the claimant provided any supporting evidence or rebuttal to the adjustment. Staff concludes that the Controller’s assertion that the calculation of productive hourly rates was inaccurate is not based on any evidence or explanation in the record and, thus, does not comply with section 1185.2(c) of the Commission’s regulations, which requires that all representations of fact shall be supported by documentary evidence. Therefore, staff finds that this adjustment is entirely lacking in evidentiary support and therefore these costs should be reinstated.

Finally, the claimant identifies the Controller’s findings that the claimant understated its indirect costs during the audit period by \$103,032. The Controller applied the understated amount to offset reductions made to other audit items, but declined to reimburse the claimant in excess of the amount claimed for each fiscal year of the audit. The claimant argues that the Controller’s determination not to pay the claimant in excess of its claims is arbitrary and capricious. However, because the Controller offset other reduced audit items to the full extent of the claim for fiscal years 2003-2004, 2004-2005, and 2005-2006, there is a net zero reduction for those years, and the claimant cannot allege an incorrect reduction under sections 17551 and 17561. Staff concludes that there is no longer a reduction in issue and the Commission does not have jurisdiction to require the Controller to reimburse amounts that have not been claimed.

### **Conclusion**

Based on the foregoing, staff recommends that the Commission partially approve this IRC, and request that the Controller reinstate the following reduction:

- Reduction of \$6,944 based on unallowable salaries and benefits in fiscal year 2002-2003.

### **Staff Recommendation**

Staff recommends that the Commission adopt the proposed decision to partially approve the IRC, and authorize staff to make any technical, non-substantive changes following the hearing.

BEFORE THE  
COMMISSION ON STATE MANDATES  
STATE OF CALIFORNIA

IN RE INCORRECT REDUCTION CLAIM  
ON:

Government Code Sections 3540-3549.9  
Statutes 1975, Chapter 961 ; Statutes 1991,  
Chapter 1213  
Fiscal Years 2002-2003 through 2005-2006

Sierra Joint Community College District,  
Claimant.

Case Nos.: 09-4425-I-17 and 10-4425-I-18

*Collective Bargaining and Collective  
Bargaining Agreement Disclosure*

DECISION PURSUANT TO  
GOVERNMENT CODE SECTION 17500 ET  
SEQ.; CALIFORNIA CODE OF  
REGULATIONS, TITLE 2, DIVISION 2,  
CHAPTER 2.5. ARTICLE 7

*(Adopted January 23, 2015)*

**DECISION**

The Commission on State Mandates (Commission) heard and decided this consolidated incorrect reduction claim (IRC) during a regularly scheduled hearing on January 23, 2015. [Witness list will be included in the adopted decision.]

The law applicable to the Commission’s determination of a reimbursable state-mandated program is article XIII B, section 6 of the California Constitution, Government Code section 17500 et seq., and related case law.

The Commission [adopted/modified] the proposed decision to [approve/partially approve/deny] the IRC at the hearing by a vote of [vote count will be included in the adopted decision].

**Summary of the Findings**

This consolidated IRC was filed, by Sierra Joint Community College District (claimant), in response to the Controller’s audit of the claimant’s annual reimbursement claims for fiscal years 2002-2003 through 2005-2006, which resulted in a total reduction of \$12,116 for unallowable salaries and benefits, of which only \$6,944 is in dispute.<sup>12</sup> The reduction was made on the ground that the claimant did not accurately calculate productive hourly rates. In addition, the Controller found that the claimant underclaimed its indirect costs by \$103,032 during the audit period,<sup>13</sup> a portion of which the Controller has determined it is not required to pay, because it exceeds, in each claim year, the total amount claimed.

The Commission finds that Government Code section 17558.5 does not bar the original “final” audit report issued April 17, 2009. In addition, the Commission finds that the *revised* audit

<sup>12</sup> Exhibit A, IRC 09-4425-I-17, at pp. 8-9.

<sup>13</sup> Exhibit B, IRC 10-4425-I-18, at p. 7.

report issued August 25, 2010 falls outside the two year deadline to complete an audit with respect to *all* relevant claim years. April 17, 2007 constitutes “the date that the audit is commenced,” for purposes of Government Code section 17558.5, and therefore the revised final audit report issued August 25, 2010 is not timely. However, even though the revised final audit report is not timely, the Commission takes official notice of the report to the extent that the revised audit report resolves any disputed issues, or mitigates the amounts in dispute in the earlier audit.

The Commission further finds that the Controller incorrectly reduced \$6,944 in costs based on the assertion that the claimant’s calculation of productive hourly rates was inaccurate. There is no evidence in the record demonstrating the Controller’s recalculation of productive hourly rates, or why such recalculation was necessary. The Controller states that the productive hourly rates were “inaccurate,” but does specify any particular flaw in the calculations, or any particular employee or employees for whom productive hourly rates were disallowed. Section 1185.2(c) of the Commission’s regulations requires that all representations of fact be supported by documentary evidence. With no explanation or evidence in the record to support the Controller’s factual assertion that the productive hourly rates were inaccurate, the Commission finds that audit determination is entirely lacking in evidentiary support, and that the full amount reduced, \$6,944, is required to be reinstated to the claimant.

Finally, the Commission finds that aside from the reductions for unsupported services and supplies, primarily confined to fiscal year 2002-2003, the claimant has not alleged any reductions in the subsequent years. As explained below, the Controller found underclaimed indirect costs in each claim year, and applied the underclaimed amounts to offset reductions for other audit items up to the total amount of the claim for each relevant fiscal year. In so doing the Controller left the claimant with a net reduction of zero for fiscal years 2003-2004, 2004-2005, and 2005-2006, and therefore the claimant can no longer allege any reduction of its fiscal year 2003-2004 through 2005-2006 claims.

Accordingly, the Commission partially approves this IRC, and directs the Controller to reinstate the following reduction:

- Reduction of \$6,944 based on unallowable salaries and benefits in fiscal year 2002-2003.

## COMMISSION FINDINGS

### I. Chronology

01/15/2004	Claimant filed its fiscal year 2002-2003 annual reimbursement claim. <sup>14</sup>
01/10/2005	Claimant filed its fiscal year 2003-2004 annual reimbursement claim. <sup>15</sup>
01/17/2006	Claimant filed its fiscal year 2004-2005 annual reimbursement claim. <sup>16</sup>
12/21/2006	Claimant filed its fiscal year 2005-2006 annual reimbursement claim. <sup>17</sup>

<sup>14</sup> Exhibit B, IRC 10-4425-I-18, at p. 11.

<sup>15</sup> Exhibit B, IRC 10-4425-I-18, at p. 11.

<sup>16</sup> Exhibit B, IRC 10-4425-I-18, at p. 11.

06/9/2008	Controller issued the draft audit report. <sup>18</sup>
07/03/2008	Claimant notified Controller of disputed adjustments. <sup>19</sup>
04/17/2009	Controller issued the final audit report. <sup>20</sup>
08/04/2009	Claimant filed the first of two consolidated IRCs. <sup>21</sup>
08/10/2009	Commission staff deemed the IRC complete and issued it for comment.
08/25/2010	Controller issued the revised final audit report. <sup>22</sup>
09/09/2010	Controller issued adjustment letters and a “results of review” letter. <sup>23</sup>
02/04/2011	Claimant filed the second of two consolidated IRCs. <sup>24</sup>
02/10/2011	The executive director deemed the second IRC complete, and consolidated the two IRCs and issued them for comments.
11/14/2014	Commission staff issued the draft proposed decision.

## II. Background

### Collective Bargaining and Collective Bargaining Agreement Disclosure Mandates

The Board of Control, predecessor to the Commission, found a reimbursable state mandate at its July 17, 1978 hearing, on the basis of Statutes 1975, chapter 961. Then, on March 26, 1998, the Commission adopted a second test claim decision on Statutes 1991, chapter 1213.<sup>25</sup> Parameters and guidelines for the two programs were consolidated on August 20, 1998, and have since been amended again, on January 27, 2000.<sup>26</sup>

At the time the reimbursement claims at issue were prepared and submitted to the Controller, the amended parameters and guidelines, adopted on January 27, 2000, were applicable. These parameters and guidelines authorize reimbursement for costs incurred to comply with sections 3540 through 3549.1 of the Government Code, and “regulations promulgated by the Public Employment Relations Board,” including:

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<sup>17</sup> Exhibit B, IRC 10-4425-I-18, at p. 11.

<sup>18</sup> Exhibit A, IRC 09-4425-I-17, at p. 8.

<sup>19</sup> Exhibit A, IRC 09-4425-I-17, at p. 8.

<sup>20</sup> Exhibit A, IRC 09-4425-I-17, at p. 8.

<sup>21</sup> Exhibit A, IRC 09-4425-I-17, at p. 2.

<sup>22</sup> Exhibit B, IRC 10-4425-I-18, at p. 4.

<sup>23</sup> Exhibit B, IRC 10-4425-I-18, at p. 4.

<sup>24</sup> Exhibit B, IRC 10-4425-I-18, at p. 2.

<sup>25</sup> Exhibit X, Test Claim Statement of Decision, 97-TC-08.

<sup>26</sup> See Exhibit X, Parameters and Guidelines, *Collective Bargaining and Collective Bargaining Agreement Disclosure*, August 20, 1998; Exhibit X, Amended Parameters and Guidelines, January 27, 2000.

- Determination of appropriate bargaining units for representation and determination of the exclusive representation and determination of the exclusive representatives;
- Elections and decertification elections of unit representatives are reimbursable in the event the Public Employment Relations Board determines that a question of representation exists and orders an election held by secret ballot;
- Negotiations: reimbursable functions include – receipt of exclusive representative’s initial contract proposal, holding of public hearings, providing a reasonable number of copies of the employer’s proposed contract to the public, development and presentation of the initial district contract proposal, negotiation of the contract, reproduction and distribution of the final contract agreement;
- Impasse proceedings, including mediation, fact-finding, and publication of the findings of the fact-finding panel;
- Collective bargaining agreement disclosure before the adoption of the agreement by the governing body;
- Contract administration and adjudication of contract disputes either by arbitration or litigation, including grievances and administration and enforcement of the contract; and
- Unfair labor practice adjudication process and public notice complaints.<sup>27</sup>

#### Controller’s Audit and Summary of the Issues

Controller’s reductions are based primarily on a lack or insufficiency of supporting documentation for costs claimed. In addition, the Controller found that the claimant failed to obtain federal approval for its indirect cost rates for at least two of the four audited years, and based upon the alternative state method of calculating indirect costs, underclaimed its indirect costs by \$103,032.<sup>28</sup> However, despite finding that the claimant underclaimed its indirect costs, the Controller determined that the underclaimed amount cannot be paid, because “only the total costs included in the initial or amended claim may be reimbursed within one year of the filing deadline...” and section 17561 “allows the SCO to adjust the payment to correct for any underpayments or overpayments based on allowable costs claimed.”<sup>29</sup>

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<sup>27</sup> Exhibit A, Incorrect Reduction Claim, page 24 (Exhibit B to the IRC, Parameters and Guidelines amended January 27, 2000).

<sup>28</sup> See Exhibit A, IRC 09-4425-I-17, at pp. 53-72 [Controller’s Final Audit Report, Issued April 17, 2009]; Exhibit B, IRC 10-4425-I-18, at pp. 25-44 [Controller’s Revised Final Audit Report, Issued August 25, 2010].

<sup>29</sup> Exhibit B, IRC 10-4425-I-18, at p. 43 [Revised Final Audit Report].

### III. Positions of the Parties

#### Sierra Joint Community College District

The portion of reduced salaries and benefits that the claimant disputes is attributed to “inaccurate productive hourly rates, resulting in costs that were overstated by \$9,186 for [fiscal year] 2002-03 and understated by \$2,242 for [fiscal year] 2004-05, leaving a net audit adjustment of \$6,944.”<sup>30</sup> The claimant states that “[n]o explanation was provided for any of these adjustments, and there is no indication as to why the payroll information reported by the District needed to be adjusted for purposes of the productive hourly rate computation.”<sup>31</sup>

For fiscal years 2003-2004 through 2005-2006, the Controller found *underclaimed* indirect costs, which were offset against all other adjustments for those years, and the net reduction in claimed costs for those years was zero.<sup>32</sup> The claimant disputes the Controller’s findings that “the District improperly determined and applied the indirect cost rate.” The claimant argues that the “difference in the claimed and audited rates is the determination of which of those cost elements are direct costs and which are indirect costs.” The claimant maintains that “federally ‘approved’ rates, which the Controller will accept without further action prior to [fiscal year] 2004-05, are ‘negotiated’ rates calculated by the District and submitted for approval, indicating that the process is not an exact science, but a determination of the relevance and reasonableness of the cost allocation assumptions made for the method used.”<sup>33</sup>

In addition, the claimant argues that the Controller is applying an incorrect auditing standard, in part relying on Government Code 12410, and also failing to make express findings that the claimant’s reimbursement claims were unreasonable or excessive.<sup>34</sup>

Finally, the claimant points out that after recalculating the claimed indirect cost rates by the alternative state method “[t]he final audit report concludes that the District failed to claim \$6,515 for [fiscal year] 2002-03, \$20,662 for [fiscal year] 2003-04, \$18,431 for [fiscal year] 2004-05, and \$49,210 for [fiscal year] 2005-06.” The claimant concludes that “[t]his results in \$94,818 in total unclaimed costs that are due to the District not applying its indirect cost rate to contract services costs in accordance with the claiming instructions.”<sup>35</sup> In the revised audit report, the total underclaimed amount is determined to be \$103,032.<sup>36</sup>

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<sup>30</sup> Exhibit A, IRC 09-4425-I-17, at pp. 8-9 [The claimant states that the first “final” audit report, issued April 17, 2009, finds overstated costs for unallowable salaries and benefits totaling \$14,489, not including indirect costs. That amount includes \$4,468 in unsupported hours, which the claimant does not dispute; and \$3,077 in ineligible expenses for two District administrators to attend a manager’s conference, which the claimant does not dispute.].

<sup>31</sup> Exhibit A, IRC 09-4425-I-17, at p. 9.

<sup>32</sup> Exhibit A, IRC 09-4425-I-17, at p. 5.

<sup>33</sup> Exhibit A, IRC 09-4425-I-17, at p. 11.

<sup>34</sup> Exhibit A, IRC 09-4425-I-17, at pp. 11-13.

<sup>35</sup> Exhibit A, IRC 09-4425-I-17, at p. 13.

<sup>36</sup> Exhibit B, IRC 10-4425-I-18, at p. 7.

However, the claimant states that “the final audit report concludes that this amount cannot be paid to the District because it exceeds the amount originally claimed.”<sup>37</sup> The claimant argues that the Controller “does not have the discretion to unilaterally determine that it will require reimbursement for audit adjustments in favor of the State and simply ignore audit adjustments in favor of the claimants.” The claimant cites section 17561, which provides that the Controller may audit and reduce claims that are excessive or unreasonable, and “shall adjust the payment to correct for any underpayment or overpayments that occurred in previous fiscal years.” The claimant concludes that the Controller “has the obligation to pay claimants any unclaimed allowable mandate cost it discovers as the result of an audit.”<sup>38</sup> Finally, the claimant argues that “the adjustment from Finding 1 was mitigated by \$3,159 attributed to the District’s understated productive hourly rate for [fiscal year] 2004-05,” and that there is “no practical difference between allowing an understated cost to mitigate one of the Controller’s adjustments and reimbursing the District for their total actual costs.”<sup>39</sup>

The claimant also raises the statute of limitations for auditing annual reimbursement claims pursuant to Government Code section 17558.5, and argues that the audit of the earliest fiscal year at issue (2002-2003) and the revised audit, are barred.<sup>40</sup> The claimant asserts that the statute of limitations applicable to the Controller’s audit of its 2002-2003 claim, filed January 15, 2004, expired January 15, 2007, pursuant to section 17558.5, as amended by Statutes 2002, chapter 1128. The audit entrance conference was held on April 17, 2007, which the claimant argues is not a timely initiation of an audit. In addition, the final audit report was issued on April 17, 2009, which the claimant asserts is two years and one day after the audit was initiated and therefore not timely.<sup>41</sup> And, the claimant asserts that the revised audit report “appear[s] to have been initiated as a result of the original incorrect reduction claim filed on August 3, 2009,” but “was not noticed to the District until the revised audit report was published on August 25, 2010, which is more than three years after the last annual claim was filed...” Finally, the claimant asserts that “the date of the revised audit report is more than two years after the original audit.”<sup>42</sup>

#### State Controller’s Office

The Controller did not submit comments on the consolidated IRCs.

However, with respect to the statute of limitations, the Controller argues, in both the original and the revised audit report, that section 17558.5 provides that when no funds are appropriated in the claim year, or payment to the claimant is not promptly made, “the time for the Controller to initiate an audit shall commence to run from the date of initial payment of the claim.”<sup>43</sup> The

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<sup>37</sup> Exhibit A, IRC 09-4425-I-17, at p. 14.

<sup>38</sup> Exhibit A, IRC 09-4425-I-17, at p. 14.

<sup>39</sup> Exhibit A, IRC 09-4425-I-17, at pp. 14-15.

<sup>40</sup> See Exhibit A, IRC 09-4425-I-17, at pp. 71; 77; Exhibit B, IRC 10-4425-I-18, at pp. 13-14.

<sup>41</sup> Exhibit B, IRC 10-4425-I-18, at pp. 13-14.

<sup>42</sup> Exhibit B, IRC 10-4425-I-18, at p. 15.

<sup>43</sup> Exhibit A, IRC 09-4425-I-17, at p. 71 [Controller’s Final Audit Report, citing Government Code section 17558.5 (as amended, Stats. 2002, ch. 1128, AB 2834)].

Controller states that “[t]he district filed its initial FY 2002-03 claims on January 15, 2004, and received the initial claim payment on October 30, 2006.”<sup>44</sup> The Controller argues that “[t]herefore, this claim was subject to the initiation of an SCO audit until October 30, 2009.” The Controller asserts that the audit entrance conference conducted on April 17, 2007 was therefore timely.<sup>45</sup>

#### IV. Discussion

Government Code section 17561(b) authorizes the Controller to audit the claims filed by local agencies and school districts and to reduce any claim for reimbursement of state mandated costs that the Controller determines is excessive or unreasonable.

Government Code Section 17551(d) requires the Commission to hear and decide a claim that the Controller has incorrectly reduced payments to the local agency or school district. If the Commission determines that a reimbursement claim has been incorrectly reduced, section 1185.9 of the Commission’s regulations requires the Commission to send the decision to the Controller and request that the costs in the claim be reinstated.

The Commission must review questions of law, including interpretation of the parameters and guidelines, *de novo*, without consideration of legal conclusions made by the Controller in the context of an audit. The Commission is vested with exclusive authority to adjudicate disputes over the existence of state-mandated programs within the meaning of article XIII B, section 6.<sup>46</sup> The Commission must also interpret the Government Code and implementing regulations in accordance with the broader constitutional and statutory scheme. In making its decisions, the Commission must strictly construe article XIII B, section 6 and not apply it as an “equitable remedy to cure the perceived unfairness resulting from political decisions on funding priorities.”<sup>47</sup>

With regard to the Controller’s audit decisions, the Commission must determine whether they were arbitrary, capricious, or entirely lacking in evidentiary support. This is similar to the standard used by the courts when reviewing an alleged abuse of discretion of a state agency.<sup>48</sup> Under this standard, the courts have found that:

When reviewing the exercise of discretion, “[t]he scope of review is limited, out of deference to the agency’s authority and presumed expertise: ‘The court may not reweigh the evidence or substitute its judgment for that of the agency. [Citation.]’” ... “In general ... the inquiry is limited to whether the decision was

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<sup>44</sup> Exhibit A, IRC 09-4425-I-17, at p. 71; Exhibit B, IRC 10-4425-I-18, at p. 43.

<sup>45</sup> *Ibid.*

<sup>46</sup> *Kinlaw v. State of California* (1991) 54 Cal.3d 326, 331-334; Government Code sections 17551, 17552.

<sup>47</sup> *County of Sonoma, supra*, 84 Cal.App.4th 1264, 1280, citing *City of San Jose v. State of California* (1996) 45 Cal.App.4th 1802, 1817.

<sup>48</sup> *Johnston v. Sonoma County Agricultural* (2002) 100 Cal.App.4th 973, 983-984. See also *American Bd. of Cosmetic Surgery, Inc. v. Medical Bd. of California* (2008) 162 Cal.App.4th 534, 547.



arbitrary, capricious, or entirely lacking in evidentiary support. . . .” [Citations.]  
When making that inquiry, the “ “court must ensure that an agency has adequately considered all relevant factors, and has demonstrated a rational connection between those factors, the choice made, and the purposes of the enabling statute.” [Citation.]’ ”<sup>49</sup>

The Commission must also review the Controller’s audit in light of the fact that the initial burden of providing evidence for a claim of reimbursement lies with the claimant.<sup>50</sup> In addition, section 1185.2(c) of the Commission’s regulations requires that any assertion of fact by the parties to an IRC must be supported by documentary evidence. The Commission’s ultimate findings of fact must be supported by substantial evidence in the record.<sup>51</sup>

**A. The Controller Met the Statutory Deadline for the Initiation of an Audit, but the Revised Audit Report was not Completed Within the Two Year Statutory Deadline Once the Audit was Commenced.**

The claimant raises a statute of limitations argument applicable to audits, based on Government Code section 17558.5.<sup>52</sup> Section 17558.5, as applicable to the claim years here at issue, requires a valid audit to be initiated no later than three years after the date that the reimbursement claim is filed or last amended. However, the section also provides that if no funds are appropriated or no payment is made “to a claimant for the program for the fiscal year for which the claim is filed, the time for the Controller to initiate an audit shall commence to run from the date of initial payment of the claim.”<sup>53</sup> “In any case,” section 17558.5 requires the audit to be completed no later than two years after it is commenced.<sup>54</sup>

*1. The Final Audit Report Issued April 17, 2009 was Timely, Pursuant to Government Code Section 17558.5.*

The claimant asserts that the audit of the 2002-2003 claim was not timely, based on the filing date of the 2002-2003 annual claim (January 15, 2004) and the dates that the audit entrance conference took place (April 17, 2007) and the audit report issued (April 17, 2009). However, the Controller asserts that the fiscal year 2002-2003 claim was not paid until October 30, 2006,

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<sup>49</sup> *American Bd. of Cosmetic Surgery, Inc, supra*, 162 Cal.App.4th at 547-548.

<sup>50</sup> *Gilbert v. City of Sunnyvale* (2005) 130 Cal.App.4th 1264, 1274-1275.

<sup>51</sup> Government Code section 17559(b), which provides that a claimant or the state may commence a proceeding in accordance with the provisions of section 1094.5 of the Code of Civil Procedure to set aside a decision of the Commission on the ground that the Commission’s decision is not supported by substantial evidence in the record.

<sup>52</sup> The Controller’s Final Audit Report, issued April 17, 2009, states that the claimant raised the statute of limitations in its response to the draft audit, but the claimant did not reiterate its allegation in IRC 09-4425-I-17. (See IRC 09-4425-I-17, at p. 71.) The claimant reiterated and expanded upon its statute of limitations argument in IRC 10-4425-I-18, at pp. 13-14.

<sup>53</sup> Government Code section 17558.5 (as amended, Stats. 2002, ch. 1128 (AB 2834)).

<sup>54</sup> Government Code section 17558.5 (as amended, Stats. 2004, ch. 313 (AB 2224)).

and that therefore section 17558.5 provides for a timely audit to be initiated as late as October 30, 2009. The relevant chronology is restated here, as follows:

January 15, 2004	Claimant filed fiscal year 2002-2003 reimbursement claim. <sup>55</sup>
January 10, 2005	Claimant filed fiscal year 2003-2004 reimbursement claim. <sup>56</sup>
January 17, 2006	Claimant filed fiscal year 2004-2005 reimbursement claim. <sup>57</sup>
October, 30, 2006	Claimant received initial payment for fiscal year 2002-2003. <sup>58</sup>
December 21, 2006	Claimant filed fiscal year 2005-2006 reimbursement claim. <sup>59</sup>
April 17, 2007	Audit entrance conference conducted. <sup>60</sup>
June 9, 2008	Controller issued draft audit report. <sup>61</sup>
July 3, 2008	Claimant notified Controller of disputed adjustments. <sup>62</sup>
April 17, 2009	Controller issued final audit report. <sup>63</sup>

The fiscal year 2002-2003 reimbursement claim was filed on January 15, 2004, but was not paid, based on the evidence in the record, until October 30, 2006.<sup>64</sup> Pursuant to section 17558.5, a filing date of January 15, 2004, if paid, would mean that the claim was “subject to the initiation of an audit by the Controller no later than...” January 15, 2007,<sup>65</sup> and would be required to be

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<sup>55</sup> Exhibit B, IRC 10-4425-I-18, at p. 11.

<sup>56</sup> Exhibit B, IRC 10-4425-I-18, at p. 11.

<sup>57</sup> Exhibit B, IRC 10-4425-I-18, at p. 11.

<sup>58</sup> Exhibit B, IRC 10-4425-I-18, at p. 43 [Revised Audit Report]; p. 19 [Claim Adjustment Notice].

<sup>59</sup> Exhibit B, IRC 10-4425-I-18, at p. 11.

<sup>60</sup> Exhibit B, IRC 10-4425-I-18, at p. 11.

<sup>61</sup> Exhibit A, IRC 09-4425-I-17, at p. 8.

<sup>62</sup> Exhibit A, IRC 09-4425-I-17, at p. 8.

<sup>63</sup> Exhibit A, IRC 09-4425-I-17, at p. 8.

<sup>64</sup> Exhibit B, IRC 10-4425-I-18, at p. 43 [Revised Audit Report]; p. 19 [Claim Adjustment Notice].

<sup>65</sup> Government Code section 17558.5 (as amended, Statutes 2002, ch. 1128 (AB 2834)).

completed within two years of the date commenced.<sup>66</sup> The claimant relies on the filing date to argue that the initiation of the audit was not timely. However, section 17558.5 also states that if funds are not appropriated or no payment is made to the claimant for a given year, the “time for the Controller to initiate an audit shall commence to run from the date of initial payment of the claim.”<sup>67</sup> The claimant argues that this provision “is void because it is impermissibly vague.”<sup>68</sup> However, article III, section 3.5 states that an administrative agency has no power “[t]o declare a statute unenforceable, or refuse to enforce a statute, on the basis of it being unconstitutional unless an appellate court has made a determination that such statute is unconstitutional...”<sup>69</sup> Therefore, the time to initiate an audit, in this case, commenced to run from October 30, 2006, when the 2002-2003 claim was first paid, and an audit initiated before October 30, 2009 would be timely. Here, the audit was initiated no later than April 17, 2007, the date of the entrance conference, more than two years and six months before the expiration of the limitation period to initiate an audit under section 17558.5. The first audit was therefore timely initiated, with respect to fiscal year 2002-2003.

The Commission further finds that the initiation of the audit with respect to the remaining claim years at issue in this case was also timely. As shown above, the annual claim for fiscal years 2003-2004 was filed January 10, 2005, and therefore an audit initiated on or before January 10, 2008 would have been timely, based on the filing date of the claim. Moreover, notices from the Controller dated September 9, 2010, and pertaining to fiscal years 2003-2004 through 2005-2006, indicate that *no claims* had yet been paid for those audit years, and therefore “the time for the Controller to initiate an audit,” pursuant to section 17558.5, had not commenced to run as of that date.<sup>70</sup> Based on the foregoing, the audit was timely initiated with respect to all successive audit years.<sup>71</sup>

The claimant has also advanced the argument that the audit was not timely completed, based on the audit entrance conference date of April 17, 2007, and the issuance of the final audit report on April 17, 2009. The claimant’s argument fails.

Section 17558.5 provides that “[i]n any case, an audit shall be completed not later than two years after the date that the audit is commenced.”<sup>72</sup> Webster’s Third New International Dictionary

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<sup>66</sup> Government Code section 17558.5 (as amended, Statutes 2002, ch. 1128 (AB 2834)). Neither the filing date of the subject reimbursement claims, nor the date the audit was commenced, controls whether the later-amended version(s) of section 17558.5 are applicable. See *Scheas v. Robertson* (1951) 38 Cal.2d 119, at p. 126 [“It is settled that the Legislature may enact a statute of limitations ‘applicable to existing causes of action or shorten a former limitation period...’”].

<sup>67</sup> Government Code section 17558.5 (as amended, Stats. 2002, ch. 1128 (AB 2834)).

<sup>68</sup> Exhibit B, IRC 10-4425-I-18, at p. 11.

<sup>69</sup> California Constitution, article III, section 3.5 (added June 6, 1978, by Proposition 5).

<sup>70</sup> Government Code section 17558.5 (as amended, Stats. 2002, ch. 1128 (AB 2834)).

<sup>71</sup> Exhibit B, IRC 10-4425-I-18, at pp. 21-23.

<sup>72</sup> Government Code section 17558.5 (as amended, Stats. 2004, ch. 313 (AB 2224)).

provides that “to commence” and “to initiate” are synonymous.<sup>73</sup> Code of Civil Procedure section 12 prescribes how statutes of limitation shall be calculated, as follows: “[t]he time in which any act provided by law is to be done is computed by excluding the first day, and including the last, unless the last day is a holiday, and then it is also excluded.” The courts have held that “[a]bsent a compelling reason for a departure, this rule governs the calculation of *all* statutorily prescribed time periods.”<sup>74</sup> Here, pursuant to section 17558.5, interpreted in accordance with Code of Civil Procedure section 12, an audit commenced on April 17, 2007 would be required to be completed by April 17, 2009, the date that the final audit report was issued.

Based on the foregoing, the Commission finds that the original audit was timely, with respect to both the initiation and the completion of the audit.

2. *The Revised Audit Issued August 25, 2010 was Issued Beyond the Deadlines Imposed by Section 17558.5, But May be Considered by the Commission to the Extent that it Narrows the Issues in Dispute or Makes Concessions to the Claimant.*

Government Code section 17558.5 provides for an audit to be initiated by the Controller within three years after the date the claim is filed, or three years after the initial payment of the claim. However, section 17558.5 also provides that “[i]n any case, an audit *shall be completed* not later than two years after the date that the audit is commenced.”

Here, the Controller’s audit of the relevant claim years was “commenced,” within the meaning of section 17558.5, no later than April 17, 2007. Therefore, a timely audit must be completed by April 17, 2009, when the first “final” audit report was issued. The revised audit report is a continuation of the *original* “final” audit report, and was issued on August 25, 2010. It therefore falls outside the statutory two year completion requirement imposed by section 17558.5. To hold otherwise would be to provide to the Controller an “end-run” around a validly enacted statutory deadline for completion of an audit, and to hold claimants subject to open-ended “revision” of audit findings.

However, the claimant maintains that even if the revised audit is barred, “[n]otwithstanding, the changes made by the Controller in the revised audit report are for substantive reasons that are now a matter of record for the original incorrect reduction claim and can be adjudicated by the Commission.”<sup>75</sup> The Commission agrees that it may take official notice<sup>76</sup> of the revised audit report, and treat the revised audit as substantive comments from the Controller on the IRC, to the extent that the revised audit report narrows the issues in dispute or mitigates the amount of reductions originally asserted by the Controller.

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<sup>73</sup> The definition of “commence” includes “to begin,” “to initiate,” and “to enter upon,” while the definition of “initiate” provides: “to begin or set going: make a beginning of: perform or facilitate the first actions, steps, or stages of...”

<sup>74</sup> *In re Anthony B.* (2002) 104 Cal.App.4th 677, at pp. 681-682 [emphasis in original].

<sup>75</sup> Exhibit B, IRC 10-4425-I-18, at p. 15.

<sup>76</sup> Code of Regulations, title 2, section 1187.5(c) [“Official notice may be taken in the manner and of the information described in Government Code section 11515.”].

Based on the foregoing, the Commission finds that the revised final audit report issued August 25, 2010 was not completed within the deadline required by section 17558.5, but may be considered by the Commission to the extent that it narrows the issues in dispute or makes concessions to the claimant with respect to its allegations in the IRC.

**B. Reductions of Costs Claimed Based on Unsupported Hours or Productive Hourly Rates are Entirely Lacking in Evidentiary Support, and must be Reinstated.**

The disputed reductions for productive hourly rates were determined to be “overstated by \$9,186 for FY 2002-2003 and understated by \$2,242 for FY 2004-2005, leaving a net audit adjustment of \$6,944.”<sup>77</sup> In the final audit report the Controller notes the claimant’s dispute with respect to this reduction, but states that “[t]he district’s response did not provide any specific objection to this issue.”<sup>78</sup>

In its IRC, the claimant asserts that the reason for the Controller’s adjustment is not clear, as follows:

The single difference between the rates calculated by the Controller and the District is the salary component. The Controller altered the salary component for specific employees and then necessarily arrived at productive hourly rates that differed from the rates calculated by the District. No explanation was provided for any of these adjustments, and there is no indication as to why the payroll information reported by the District needed to be adjusted for purposes of the productive hourly rate computation. The propriety of these adjustments cannot be determined until the Controller states the reason for each change to the employee payroll information.<sup>79</sup>

There is no evidence in the record indicating how productive hourly rates were calculated and claimed. The claiming instructions describe a menu of options for claimants to calculate productive hourly rates, but the record does not make clear which option was chosen by the claimant. However, there is a similar lack of evidence in the record demonstrating the Controller’s recalculation of productive hourly rates, or why such recalculation was necessary. The Controller states that the productive hourly rates were “inaccurate,” but does specify any particular flaw in the calculations, or any particular employee or employees for whom productive hourly rates were disallowed. Section 1185.2(c) of the Commission’s regulations requires that all representations of fact shall be supported by documentary evidence and submitted with the comments. The Commission finds that there is no explanation or evidence in the record to support the Controller’s factual assertion that the productive hourly rates were inaccurate.

Therefore, based on the evidence in the record, the Commission finds that the Controller’s audit determination is entirely lacking in evidentiary support, and that the full amount reduced, \$6,944, is required to be reinstated to the claimant.

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<sup>77</sup> Exhibit A, IRC 09-4425-I-17, at pp. 8-9.

<sup>78</sup> Exhibit A, IRC 09-4425-I-17, at p. 65 [Final Audit Report, issued April 17, 2009].

<sup>79</sup> Exhibit A, IRC 09-4425-I-17, at p. 9.

**C. With Regard to the Controller’s Audit of a Reimbursement Claim, the Commission has Jurisdiction Only Where the Controller has Reduced a Claim.**

The claimant asserts that the Controller incorrectly determined that its indirect cost rates were improperly calculated and applied, resulting in an underclaimed amount of \$103,032.<sup>80</sup> The claimant notes that the final audit report incorrectly describes the parameters and guidelines, and that “[f]ederally-approved indirect cost rates remain acceptable pursuant to the Parameters and Guidelines for the Collective Bargaining mandate, despite the Controller’s preference to the contrary.”<sup>81</sup> In addition, the claimant argues that “[s]ince the Controller’s claiming instructions were never adopted as law, or regulations pursuant to the Administrative Procedure Act, the claiming instructions are a statement of the Controller’s interpretation and not law.”<sup>82</sup> And, the claimant argues that “[t]he audit did not determine that the District’s rate was excessive or unreasonable, just that it wasn’t federally approved.”<sup>83</sup> Claimant requests that the Commission direct the Controller to reimburse the amounts underclaimed and argues that section 17561(d)(2) requires “the adjustment of *both* underpayments and overpayments...”<sup>84</sup> The claimant argues that “the Controller does not have discretion to unilaterally determine that it will require reimbursement for audit adjustments in favor of the State and simply ignore audit adjustments in favor of the claimants.”<sup>85</sup>

The final audit report issued April 17, 2009 states that “[t]he district developed indirect cost rate proposals (ICRPs) in accordance with Office of Management and Budget (OMB) Circular A-21...” but that “[f]or FY 2004-05 and 2005-06, the parameters and guidelines and SCO’s claiming instructions do not provide districts the option of using a federally-approved rate.” In addition, the Controller asserts that “[f]or FY 2002-03 and FY 2003-04, the SCO’s claiming instructions allow the district to use federally-approved rate prepared in accordance with OMB Circular A-21[.]” but that “the district did not obtain federal approval for the applicable two years.”<sup>86</sup> The Controller concedes that its findings are factually incorrect, and deletes the offending language, in its *revised* final audit report issued August 25, 2010.<sup>87</sup>

Based on its recalculation of indirect costs using the Controller’s preferred FAM-29C method, the Controller determined that the claimant underclaimed its indirect costs by \$94,818 in the final audit report issued April 17, 2009, and \$103,032 in the revised final audit report issued August 25, 2010. However, in both the final audit report and the revised final audit report, the Controller maintained that it is not required to pay the claimant in excess of the total costs claimed. The Controller applied the underclaimed indirect costs to offset other unallowable costs

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<sup>80</sup> Exhibit B, IRC 10-4425-I-18, at p. 7.

<sup>81</sup> Exhibit A, IRC 09-4425-I-17, at p. 10.

<sup>82</sup> Exhibit A, IRC 09-4425-I-17, at p. 11.

<sup>83</sup> Exhibit A, IRC 09-4425-I-17, at p. 13.

<sup>84</sup> Exhibit A, Incorrect Reduction Claim, at p. 77.

<sup>85</sup> Exhibit A, Incorrect Reduction Claim, at p. 77.

<sup>86</sup> Exhibit A, IRC 09-4425-I-17, at p. 67 [Final Audit Report, issued April 17, 2009].

<sup>87</sup> Exhibit B, IRC 10-4425-I-18, at p. 42 [Revised Final Audit Report, issued August 25, 2010].

reduced, resulting in a net adjustment of zero for fiscal years 2003-2004 through 2005-2006.<sup>88</sup> The Controller declined to pay the claimant any more than its total claim for each fiscal year, stating: “*only the total costs* included in the initial or amended claim may be reimbursed within one year of the filing deadline...” and section 17561 “allows the SCO to adjust the payment to correct for any underpayments or overpayments *based on allowable costs claimed.*”<sup>89</sup>

Government Code section 17551 provides that the Commission “shall hear and decide upon a claim by a local agency or school district filed on or after January 1, 1985, *that the Controller has incorrectly reduced payments* to the local agency or school district...” pursuant to an audit.<sup>90</sup> The Controller’s audit authority is detailed in Government Code section 17561, which provides that the Controller may audit the claims of a local agency or school district “to verify the actual amount of the mandated costs...” and “may reduce any claim that the Controller determines is excessive or unreasonable.”<sup>91</sup> The claimant focuses on the next sentence of section 17561, which states that the Controller “*shall adjust* the payment to correct for any underpayments or overpayments that occurred in previous fiscal years.” The claimant thus implores the Commission to make a finding that the Controller is required to correct the “underpayment” that it discovered through its audit of the claimant’s indirect cost rates.

However, the plain language of section 17551, which directs the Commission to hear IRCs in the first instance, applies only to claims that are reduced. Here, as explained above, the reductions and underclaimed indirect costs were offset against one another to the extent that a net reduction of zero resulted for fiscal years 2003-2004 through 2005-2006. Without a reduction alleged, the claim is not an IRC, by definition, and the Commission does not have jurisdiction over the claim.

## **V. Conclusion**

Based on the foregoing, the Commission partially approves this IRC, and requests that the Controller reinstate the following reduction:

- Reduction of \$6,944 based on unallowable salaries and benefits in fiscal year 2002-2003.

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<sup>88</sup> See Exhibit A, IRC 09-4425-I-17, at p. 2 [stating reductions of \$0 for fiscal years 2003-2004, 2004-2005, and 2005-2006].

<sup>89</sup> Exhibit B, IRC 10-4425-I-18, at p. 43 [Revised Final Audit Report] [emphasis added].

<sup>90</sup> Government Code section 17551 (Stats. 2007, ch. 329 (AB 2224)) [emphasis added].

<sup>91</sup> Government Code section 17561 (Stats. 2009, ch. 4 (SBX3 8)).

**DECLARATION OF SERVICE BY EMAIL**

I, the undersigned, declare as follows:

I am a resident of the County of Solano and I am over the age of 18 years, and not a party to the within action. My place of employment is 980 Ninth Street, Suite 300, Sacramento, California 95814.

On November 14, 2014, I served the:

**Draft Proposed Decision, Schedule for Comments, and Notice of Hearing**  
*Collective Bargaining and Collective Bargaining Agreement Disclosure*  
09-4425-I-17 and 10-4425-I-18  
Government Code Sections 3540-3549.9  
Statutes 1975, Chapter 961; Statutes 1991, Chapter 1213  
Fiscal Years 2002-2003 through 2005-2006  
Sierra Joint Community College District, Claimant

by making it available on the Commission's website and providing notice of how to locate it to the email addresses provided on the attached mailing list.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that this declaration was executed on November 14, 2014 at Sacramento, California.



---

Heidi J. Palchik  
Commission on State Mandates  
980 Ninth Street, Suite 300  
Sacramento, CA 95814  
(916) 323-3562



# COMMISSION ON STATE MANDATES

## Mailing List

**Last Updated:** 11/13/14

**Claim Number:** 09-4425-I-17 and 10-4425-I-18

**Matter:** Collective Bargaining

**Claimant:** Sierra Joint Community College District

### TO ALL PARTIES, INTERESTED PARTIES, AND INTERESTED PERSONS:

Each commission mailing list is continuously updated as requests are received to include or remove any party or person on the mailing list. A current mailing list is provided with commission correspondence, and a copy of the current mailing list is available upon request at any time. Except as provided otherwise by commission rule, when a party or interested party files any written material with the commission concerning a claim, it shall simultaneously serve a copy of the written material on the parties and interested parties to the claim identified on the mailing list provided by the commission. (Cal. Code Regs., tit. 2, § 1181.3.)

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# SixTen and Associates

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Exhibit D

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November 26, 2014

**RECEIVED**  
November 26, 2014  
*Commission on  
State Mandates*

Heather Halsey, Executive Director  
Commission on State Mandates  
980 Ninth Street, Suite 300  
Sacramento, CA 95814

Dear Ms. Halsey:

RE: CSM 09-4425-I-17 and CSM 10-4425-I-18  
Sierra Joint Community College District  
Collective Bargaining  
Fiscal Years 2002-03, 2003-04, 2004-05, and 2005-06  
Original and Revised Incorrect Reduction Claims

I have received the Commission Draft Proposed Decision (DPD) dated November 14, 2014, for the above-referenced incorrect reduction claim, to which I respond on behalf of the District.

### PART A. STATUTE OF LIMITATIONS APPLICABLE TO AUDITS OF ANNUAL REIMBURSEMENT CLAIMS

#### Claim Action Dates

January 15, 2004	FY 2002-03 annual claim filed by the District
January 10, 2005	FY 2003-04 annual claim filed by the District
January 17, 2006	FY 2004-05 annual claim filed by the District
October 30, 2006	First payment on FY 2002-03
December 21, 2006	FY 2005-06 annual claim filed by the District
April 3, 2007	Audit entrance conference letter date
April 17, 2007	Audit entrance conference conducted
April 17, 2009	Original final audit report issued
August 25, 2010	Revised audit report issued

## 1. Audit Initiation

The District asserted that the three-year statute of limitations to commence an audit for the FY 2002-03 annual claim expired before the audit commenced. The FY 2002-03 annual claim was filed by the District on January 15, 2004, and is subject to the 2002 version of Government Code Section 17558.5,<sup>1</sup> which states that a claim is subject to the initiation of an audit no later than three years after the date the claim is filed, or if no funds are appropriated or no payment is made to a claimant, the time for the Controller to initiate an audit shall commence to run from the date of initial payment of the claim. The record indicates that the first payment was made on October 30, 2006, thus starting the three-year clock from that date to commence the audit. The audit was commenced before October 30, 2009, therefore there is no further dispute on this issue.

## 2. Audit Completion

### A. Original Audit

It is uncontested here that an audit is complete only when the final audit report is issued. The District asserts that the annual reimbursement claims for FY 2003-04, FY 2004-05, and FY 2005-06, that are subject to the 2004 version of Section 17558.5<sup>2</sup>,

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<sup>1</sup> Statutes of 2002, Chapter 1128, Section 14.5, operative January 1, 2003, amended Section 17558.5 to state:

“(a) A reimbursement claim for actual costs filed by a local agency or school district pursuant to this chapter is subject to the initiation of an audit by the Controller no later than three years after the end of the calendar year in which the date that the actual reimbursement claim is filed or last amended, whichever is later. However, if no funds are appropriated or no payment is made to a claimant for the program for the fiscal year for which the claim is made filed, the time for the Controller to initiate an audit shall commence to run from the date of initial payment of the claim.”

<sup>2</sup> Statutes of 2004, Chapter 890, Section 18, operative January 1, 2005 amended Section 17558.5 to state:

“(a) A reimbursement claim for actual costs filed by a local agency or school district pursuant to this chapter is subject to the initiation of an audit by the Controller no later than three years after the date that the actual reimbursement claim is filed or last amended, whichever is later. However, if no funds are appropriated or no payment is made to a

which adds the requirement that an audit must be completed within two years of its commencement, were not timely completed. The Commission concludes (DPD, 17) that original audit report dated April 17, 2009, was issued exactly two years after the entrance conference conducted on April 17, 2007, as measured by Code of Civil Procedure, section 12. However, the audit commenced on April 3, 2007, or perhaps a few days earlier for the initial phone contact, based on the date of the entrance conference letter (Attachment A).

The Commission has not determined as a matter of law whether the date of the first telephone contact to the district, entrance conference letter, or entrance conference date commences the audit and thus the two-year clock to complete the audit. The Controller considers the audit commencement date to be the date of first contact made by Controller to the claimant. Jim Spano, Bureau Chief, Mandated Cost Audit Bureau, State Controller's Office, in an e-mail (see Attachment B) dated November 22, 2011, to Nancy Patton, Assistant Executive Director of the Commission at that time, stated the following:

*At the same meeting, Commission staff asked what we believe constitutes the initiation of an audit pursuant to Government Code section 17558.5. We consider the event that initiates an audit pursuant to Government Code section 17558.5 to be the date of the initial contact by the SCO to the auditee (generally a telephone contact) to inform them and put them on notice of the SCO's intention to perform the audit. In addition, we consider this same date as the event that commences the two-year period to complete an audit pursuant to Government Code section 17558.5. (Emphasis added).*

The Controller's April 3, 2007, entrance conference letter indicates that the first contact with the district was at least as early as that date. The original final audit report is dated April 17, 2009, which is more than two years after the first contact date, thus past the statute of limitations to complete the audit.

#### B. Revised Audit

The Commission (DPD, 17) concludes that the revised audit report was not timely completed, to which the District concurs. The District also agrees that the Commission can take official notice of the revised audit findings.

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claimant for the program for the fiscal year for which the claim is filed, the time for the Controller to initiate an audit shall commence to run from the date of initial payment of the claim. In any case, an audit shall be completed not later than two years after the date that the audit is commenced."

## PART B. DISALLOWANCE OF STAFF TIME

The audit reports eliminated \$14,489 in direct costs and \$4,938 in related indirect costs as unallowable salary and benefit costs for three reasons: (1) inaccurate productive hourly rates; (2) unsupported hours; and, (3) ineligible costs. The \$4,468 disallowance in unsupported costs for FY 2002-03 is not disputed. The \$3,077 disallowance in ineligible costs for FY 2002-03 is not disputed. The Commission reinstated (DPD, 18) the remaining disallowance of \$6,944, so there are no further issues in dispute.

## PART C. APPLICATION OF AN INDIRECT COST RATE

The audit reports determined that the District understated indirect costs because the District did not obtain federal approval for the indirect cost rate used for FY 2002-03 and FY 2003-04, and did not correctly compute the FAM-29 C indirect cost rate for FY 2004-05 and FY 2005-06. The understated amount in the original audit report finding was \$94,818. The revised audit report increases the understated amount by \$8,214 to \$103,032. The District still disputes the audit findings for FY 2002-03 and FY 2003-04 because neither capital costs nor depreciation expenses are allowed by Controller policy. However, the Commission makes no finding on this issue because it asserts its jurisdiction is limited to reductions and not audit amounts that increase the claim, which is a separate issue, which follows.

## PART D. LIMITATION OF ALLOWED AUDITED COSTS

The District asserts that the Controller's failure to increase the reimbursable mandate costs beyond those which were claimed was an incorrect reduction of total reimbursable costs and an underpayment of reimbursable amounts.

The revised audit report deducts from its findings of "total program costs" the amounts of \$20,662 for FY 2003-04, \$23,853 for FY 2004-05, and \$54,244 for FY 2005-06, as "less allowable costs that exceed cost claimed." The stated basis for this limitation on allowable costs is Government Code Section 17561[(d)(3)], cited in footnote 2 on page 6 of the audit report that states, "that the State will not reimburse any claim more than one year after the filing deadline." The State did not pay these claims in full or part within one year of the filing deadline, and rarely does so, so that citation does not appear relevant. Section 17561 (and Section 17568 for late claims) pertains to the timely filing of an annual claim in order to be eligible for payment, not to the contents of the claim itself.

There is no Government Code section cited that prohibits the Controller from reimbursement of *audited* costs in excess of claimed costs. Government Code Section 17561(d)(2), as amended by Statutes of 2002, Chapter 1124, effective September 30, 2002, states:

"[T]he Controller (A) may audit the records of any local agency or school district to verify the actual amount of the mandated costs . . . and (C) shall adjust the payment to correct for any underpayments or overpayments which occurred in previous fiscal years."

The use of the word "shall" makes the adjustment of *both* underpayments and overpayments mandatory. Thus, the Controller does not have the discretion to unilaterally determine that it will deny reimbursement for audit adjustments in favor of the State and simply ignore audit adjustments in favor of the claimants. The Controller, therefore, has the obligation to pay claimants any unclaimed allowable mandate cost discovered as the result of an audit.

The Commission does not decide this issue because it denies jurisdiction of the fiscal year 2003-2004 through 2005-2006 claims. The Commission concluded (DPD, 20), that the "plain language" of section 17551, which directs the Commission to hear incorrect reduction claims, applies only to claims that are reduced, and therefore has no jurisdiction for fiscal years 2003-2004 through 2005-2006. More specifically (DPD, 20), "[w]ithout a reduction alleged, the claim is not an IRC, by definition, and the Commission does not have jurisdiction over the claim."

### CERTIFICATION

By my signature below, I hereby declare, under penalty of perjury under the laws of the State of California, that the information in this submission is true and complete to the best of my own knowledge or information or belief, and that any attached documents are true and correct copies of documents received from or sent by the District or state agency which originated the document.

Executed on November 26, 2014, at Sacramento, California, by



Keith B. Petersen, President  
SixTen & Associates

#### Attachments:

- A. Controller's (Suzanne Goodwin) April 3, 2007, entrance conference letter
- B. Controller's (Jim Spano) November 22, 2011, e-mail to the Commission

Service by Commission Electronic Drop Box





**JOHN CHIANG**  
California State Controller

April 3, 2007

Copy: Joyce L.  
Jeanne L.  
Keith P.  
Linda F.  
Judy McC.  
4-12-07  
CS

Joyce Lopes, Director of Finance  
Sierra Joint Community College District  
5000 Rocklin Road  
Rocklin, CA 95677

Dear Ms. Lopes:

This letter confirms that Curt Chiesa and Ken Howell of the State Controller's Office have scheduled an audit of Sierra Joint Community College District's legislatively mandated Collective Bargaining Program cost claims filed for fiscal years (FY) 2002-03, FY 2003-04, FY 2004-05 and FY 2005-06. *Government Code* Sections 12410, 17558.5, and 17561 provide the authority for this audit. The entrance conference is scheduled for Tuesday, April 17th, 2007, at 2 p.m. Audit fieldwork will begin after the entrance conference.

Please furnish working accommodations for and provide the necessary records to the audit staff.

If you have any questions, please call me at (916) 324-9217.

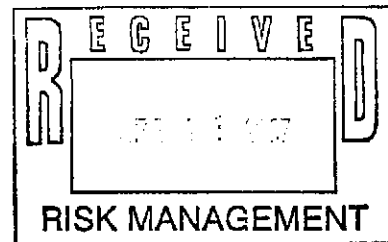
Sincerely,

SUZANNE GOODWIN  
Audit Manager  
Compliance Audits Bureau  
Division of Audits

SG/ams

Attachment

6054



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SACRAMENTO 300 Capitol Mall, Suite 518, Sacramento, CA 95814 (916) 324-8907  
LOS ANGELES 600 Corporate Pointe, Suite 1000, Culver City, CA 90230 (310) 342-5656

Joyce Lopes, Director of Finance

-2-

April 3, 2007

cc: Lawrence Lee, Director  
Risk, Feasibility & Loss Control  
Sierra Joint Community College District  
Jim L. Spano, Chief  
Compliance Audits Bureau  
Division of Audits  
State Controller's Office  
Ginny Brummels, Manager  
Division of Accounting and Reporting  
State Controller's Office  
Curt Chiesa, Auditor-in-Charge  
Division of Audits  
State Controller's Office  
Ken Howell, Auditor  
Division of Audits  
State Controller's Office

Subj: **FW: Updated Listing of Outstanding HFE IRCs and Event That Initiates An Audit/Starts the Two-Year Audit Clock**  
Date: 11/22/2011 10:51:04 A.M. Pacific Standard Time  
From: [jspano@sco.ca.gov](mailto:jspano@sco.ca.gov)  
To: [Nancy.Patton@csm.ca.gov](mailto:Nancy.Patton@csm.ca.gov), [Kbpsixten@aol.com](mailto:Kbpsixten@aol.com)  
CC: [ssilva@sco.ca.gov](mailto:ssilva@sco.ca.gov), [svanee@sco.ca.gov](mailto:svanee@sco.ca.gov)

Nancy, Keith,

Attached is the updated listing of outstanding Health Fee Elimination Program Incorrect Reduction Claims (IRCs), detailed by audit issues, as discussed with Keith Petersen and representatives of the Commission and SCO after the October 27, 2011, Commission hearing. The IRCs are in chronological order according to the filing date.

At the same meeting, Commission staff asked what we believe constitutes the initiation of an audit pursuant to Government Code section 17558.5. We consider the event that initiates an audit pursuant to Government Code section 17558.5 to be the date of the initial contact by the SCO to the auditee (generally a telephone contact) to inform them and put them on notice of the SCO's intention to perform the audit. In addition, we consider this same date as the event that commences the two-year period to complete an audit pursuant to Government Code section 17558.5.

I believe the next step is to coordinate a meeting or telephone conference call to discuss the prioritization of outstanding Health Fee Elimination Programs IRCs based on the updated listing.

***Jim L. Spano, CPA***

Bureau Chief  
State Controller's Office  
Division of Audits / Mandated Cost Audits Bureau  
Office: (916) 323-5849 / Fax: (916) 327-0832  
[jspano@sco.ca.gov](mailto:jspano@sco.ca.gov)

CONFIDENTIALITY NOTICE: This communication with its contents as well as any attachments may contain confidential and/or legally privileged information. It is solely for the use of the intended recipient(s). Unauthorized interception, review, use or disclosure is prohibited and may violate applicable laws including the Electronic Communications Privacy Act. If you are not the intended recipient, please contact the sender and destroy all copies of the communication.

**DECLARATION OF SERVICE BY EMAIL**

I, the undersigned, declare as follows:

I am a resident of the County of Sacramento and I am over the age of 18 years, and not a party to the within action. My place of employment is 980 Ninth Street, Suite 300, Sacramento, California 95814.

On December 1, 2014, I served the:

**Claimant Comments**

*Collective Bargaining and Collective Bargaining Agreement Disclosure*

09-4425-I-17 and 10-4425-I-18

Government Code Sections 3540-3549.9

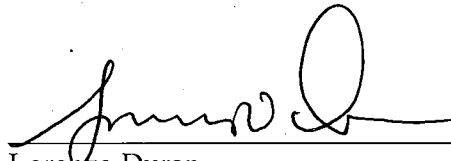
Statutes 1975, Chapter 961; Statutes 1991, Chapter 1213

Fiscal Years 2002-2003 through 2005-2006

Sierra Joint Community College District, Claimant

By making it available on the Commission's website and providing notice of how to locate it to the email addresses provided on the attached mailing list.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that this declaration was executed on December 1, 2014 at Sacramento, California.



Lorenzo Duran  
Commission on State Mandates  
980 Ninth Street, Suite 300  
Sacramento, CA 95814  
(916) 323-3562

# COMMISSION ON STATE MANDATES

## Mailing List

**Last Updated:** 11/19/14

**Claim Number:** 09-4425-I-17 and 10-4425-I-18

**Matter:** Collective Bargaining and Collective Bargaining Agreement Disclosure

**Claimant:** Sierra Joint Community College District

### TO ALL PARTIES, INTERESTED PARTIES, AND INTERESTED PERSONS:

Each commission mailing list is continuously updated as requests are received to include or remove any party or person on the mailing list. A current mailing list is provided with commission correspondence, and a copy of the current mailing list is available upon request at any time. Except as provided otherwise by commission rule, when a party or interested party files any written material with the commission concerning a claim, it shall simultaneously serve a copy of the written material on the parties and interested parties to the claim identified on the mailing list provided by the commission. (Cal. Code Regs., tit. 2, § 1181.3.)

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Yazmin.meza@dof.ca.gov

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robertm@sscal.com

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**Claimant Representative**

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**Dennis Speciale**, *State Controller's Office*

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Phone: (916) 324-0254

DSpeciale@sco.ca.gov



**JOHN CHIANG**  
California State Controller

December 2, 2014

**RECEIVED**  
December 02, 2014  
*Commission on  
State Mandates*

Heather Halsey  
Executive Director  
Commission on State Mandates  
980 Ninth Street, Suite 300  
Sacramento, CA 95814

**Re: Draft Proposed Decision**

Incorrect Reduction Claim (IRC)  
*Collective Bargaining and Collective Bargaining Agreement Disclosure*  
09-4425-I-17 and 10-4425-I-18  
Government Code sections 3540-3549.9  
Statutes 1975, Chapter 961; Statutes 1991, Chapter 1213  
Fiscal Years 2002-2003 through 2005-2006  
Sierra Joint Community College District, Claimant

Dear Ms. Halsey:

The State Controller's Office has reviewed the Commission's November 14, 2014 draft staff analysis related to the above IRC filed by Sierra Joint Community College District. We support the Commission's conclusion.

The draft staff analysis recommended that the SCO reinstate a reduction to salaries and benefits by \$6,944 for productively hourly rate adjustments (overstated salaries and benefits by \$9,186 for FY 2002-03 and understated salaries and benefits by \$2,242 for FY 2004-05). We recalculated productive hourly rates for six employees for FY 2002-03 and five employees for FY 2004-05 based on updated salary and productive hours information. However, we did not maintain a copy of the supporting documentation. The reinstatement of the unallowable costs for FY 2002-03 affects \$11,121 in costs (\$9,186 for salaries and benefits and \$1,935 for indirect costs). The reversal of understated costs for FY 2004-05 affects \$3,023 in costs (\$2,242 for salaries and benefits and \$781 for indirect costs).

The draft staff analysis stated that the Commission has no jurisdiction over the understated indirect cost issue as there was no reduction. Nevertheless, we believe our adjustment is valid. The audit determined that indirect costs were overstated by \$103,032 for the audit period. The district claimed costs using an indirect cost rate that was not federally approved, and thus was not allowed by the parameters and guidelines. We recalculated the indirect cost rate using the SCO's FAM-29C that the parameters and guidelines allowed. We allowed the increased costs up to the amounts claimed.

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LOS ANGELES 901 Corporate Center Drive, Suite 200, Monterey Park, CA 91754 (323) 981-6802

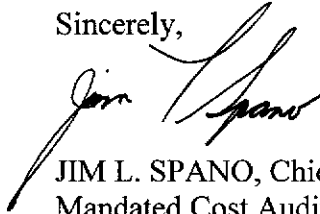


Heather Halsey  
December 2, 2014  
Page 2

The draft staff analysis also determined that the audit was timely initiated and completed.

If you have any questions, please contact me by telephone at (916) 323-5849.

Sincerely,

A handwritten signature in black ink, appearing to read "Jim L. Spano". The signature is written in a cursive style with a long, sweeping underline that extends to the left.

JIM L. SPANO, Chief  
Mandated Cost Audits Bureau  
Division of Audits

JLS/sk

14827

**DECLARATION OF SERVICE BY EMAIL**

I, the undersigned, declare as follows:

I am a resident of the County of Sacramento and I am over the age of 18 years, and not a party to the within action. My place of employment is 980 Ninth Street, Suite 300, Sacramento, California 95814.

On December 3, 2014, I served the:

**SCO Comments on Draft Proposed Decision**

*Collective Bargaining and Collective Bargaining Agreement Disclosure*

09-4425-I-17 and 10-4425-I-18

Government Code Sections 3540-3549.9

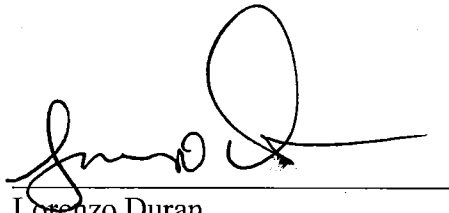
Statutes 1975, Chapter 961; Statutes 1991, Chapter 1213

Fiscal Years 2002-2003 through 2005-2006

Sierra Joint Community College District, Claimant

By making it available on the Commission's website and providing notice of how to locate it to the email addresses provided on the attached mailing list.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that this declaration was executed on December 3, 2014 at Sacramento, California.



---

Lorenzo Duran

Commission on State Mandates

980 Ninth Street, Suite 300

Sacramento, CA 95814

(916) 323-3562

# COMMISSION ON STATE MANDATES

## Mailing List

**Last Updated:** 11/19/14

**Claim Number:** 09-4425-I-17 and 10-4425-I-18

**Matter:** Collective Bargaining and Collective Bargaining Agreement Disclosure

**Claimant:** Sierra Joint Community College District

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apalkowitz@sashlaw.com

**Keith Petersen**, *SixTen & Associates*

**Claimant Representative**

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**Dennis Speciale**, *State Controller's Office*

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## COMMISSION ON STATE MANDATES

980 NINTH STREET, SUITE 300  
SACRAMENTO, CA 95814  
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FAX: (916) 445-0278  
E-mail: csminfo@csm.ca.gov



January 9, 2015

Mr. Keith B. Petersen  
SixTen & Associates  
P.O. Box 340430  
Sacramento, CA 95834-0430

Ms. Jill Kanemasu  
State Controller's Office  
Accounting and Reporting  
3301 C Street, Suite 700  
Sacramento, CA 95816

*And Parties, Interested Parties, and Interested Persons (See Mailing List)*

Re: **Proposed Decision**  
*Collective Bargaining and Collective Bargaining Agreement Disclosure*  
09-4425-I-17 and 10-4425-I-18  
Government Code Sections 3540-3549.9  
Statutes 1975, Chapter 961; Statutes 1991, Chapter 1213  
Fiscal Years 2002-2003 through 2005-2006  
Sierra Joint Community College District, Claimant

Dear Mr. Petersen and Ms. Kanemasu:

### Hearing

This matter is set for hearing on **Friday, January 23, 2015**, at 10:00 a.m., State Capitol, Room 447, Sacramento, California. Please let us know in advance if you or a representative of your agency will testify at the hearing, and if other witnesses will appear. If you would like to request postponement of the hearing, please refer to section 1187.9(b) of the Commission's regulations.

### Special Accommodations

For any special accommodations such as a sign language interpreter, an assistive listening device, materials in an alternative format, or any other accommodations, please contact the Commission Office at least five to seven *working* days prior to the meeting.

Sincerely,

A handwritten signature in black ink, appearing to read "Heather Halsey".

Heather Halsey  
Executive Director

## ITEM 9

### INCORRECT REDUCTION CLAIM

#### PROPOSED DECISION

Government Code Sections 3540-3549.9

Statutes 1975, Chapter 961; Statutes 1991, Chapter 1213

*Collective Bargaining and Collective Bargaining Agreement Disclosure*

Fiscal Years 2002-2003 through 2005-2006

09-4425-I-17 and 10-4425-I-18

Sierra Joint Community College District, Claimant

---

#### EXECUTIVE SUMMARY

##### Overview

This analysis addresses two consolidated incorrect reduction claims (IRCs) filed by Sierra Joint Community College District (claimant) regarding reductions made by the State Controller's Office (Controller) to reimbursement claims for fiscal years 2002-2003 through 2005-2006 under the *Collective Bargaining and Collective Bargaining Agreement Disclosure* program.

The following issues are in dispute in this IRC:

- The statutory deadlines applicable to audits;
- Unallowable costs related to salaries and benefits;
- Whether underclaimed indirect costs which are supported by the reimbursement claim and other supporting documentation in the record are required to be paid in favor of a local government claimant.

For the reasons outlined below, staff recommends that the Commission on State Mandates (Commission) approve this IRC and direct the Controller to reinstate \$6,944 based on net unallowable salaries and benefits for fiscal years 2002-2003 and 2004-2005 and the full amount of allowable indirect costs based on allowable direct costs claimed: \$20,662 for fiscal year 2003-2004; \$21,611 for fiscal year 2004-2005, and \$54,244 for fiscal year 2005-2006.

##### *Collective Bargaining and Collective Bargaining Agreement Disclosure Mandates*

On July 17, 1978, the Board of Control, predecessor to the Commission, found that Statutes 1975, chapter 961 imposed a reimbursable state mandate. On March 26, 1998, the Commission adopted a second test claim decision on Statutes 1991, chapter 1213. Parameters and guidelines for the two programs were consolidated on August 20, 1998, and were amended on January 27, 2000.

At the time the reimbursement claims at issue were prepared and submitted to the Controller, the amended parameters and guidelines, adopted on January 27, 2000, were applicable. These

parameters and guidelines authorize reimbursement for costs incurred to comply with sections 3540 through 3549.1 of the Government Code, and “regulations promulgated by the Public Employment Relations Board,” including:

- Determination of appropriate bargaining units for representation and determination of the exclusive representation and determination of the exclusive representatives;
- Elections and decertification elections of unit representatives are reimbursable in the event the Public Employment Relations Board determines that a question of representation exists and orders an election held by secret ballot;
- Negotiations: reimbursable functions include – receipt of exclusive representative’s initial contract proposal, holding of public hearings, providing a reasonable number of copies of the employer’s proposed contract to the public, development and presentation of the initial district contract proposal, negotiation of the contract, reproduction and distribution of the final contract agreement;
- Impasse proceedings, including mediation, fact-finding, and publication of the findings of the fact-finding panel;
- Collective bargaining agreement disclosure before the adoption of the agreement by the governing body;
- Contract administration and adjudication of contract disputes either by arbitration or litigation, including grievances and administration and enforcement of the contract; and
- Unfair labor practice adjudication process and public notice complaints.<sup>1</sup>

### **Procedural History**

On January 15, 2004, claimant filed its 2002-2003 reimbursement claim.<sup>2</sup> On January 10, 2005, claimant filed its 2003-2004 reimbursement claim.<sup>3</sup> On January 17, 2006, claimant filed its 2004-2005 reimbursement claim.<sup>4</sup> On October 30, 2006, the 2002-2003 reimbursement claim was paid by the Controller.<sup>5</sup> On December 21, 2006, claimant filed its 2005-2006 reimbursement claim.<sup>6</sup> On June 9, 2008, the Controller issued its draft audit report for the fiscal years at issue. On July 3, 2008, the claimant notified the Controller that it was disputing some of the proposed adjustments. On April 17, 2009, the Controller issued its final audit report for

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<sup>1</sup> Exhibit A, Incorrect Reduction Claim, page 24 (Exhibit B to the IRC, Parameters and Guidelines amended January 27, 2000).

<sup>2</sup> Exhibit B, IRC 10-4425-I-18, page 11.

<sup>3</sup> Exhibit B, IRC 10-4425-I-18, page 11.

<sup>4</sup> Exhibit B, IRC 10-4425-I-18, page 11.

<sup>5</sup> Exhibit B, IRC 10-4425-I-18, page 43 [Revised Audit Report]; p. 19 [Claim Adjustment Notice].

<sup>6</sup> Exhibit B, IRC 10-4425-I-18, page 11.



fiscal years 2002-2003 through 2005-2006.<sup>7</sup> On August 4, 2009, the claimant filed 09-4425-I-17.<sup>8</sup> On August 25, 2010, the Controller issued a revised final audit report.<sup>9</sup> As of September 9, 2010, no reimbursement claims for 2003-2004 through 2005-2006, had been paid. On February 4, 2011, the claimant filed 10-4425-I-18.<sup>10</sup> On November 14, 2014, Commission staff issued a draft proposed decision on the consolidated IRC.<sup>11</sup> On November 26, 2014, the claimant filed comments on the draft proposed decision.<sup>12</sup> On December 2, 2014, the Controller filed comments on the draft proposed decision.<sup>13</sup>

### **Commission Responsibilities**

Government Code section 17561(b) authorizes the Controller to audit the claims filed by local agencies and school districts and to reduce any claim for reimbursement of state-mandated costs that the Controller determines is excessive or unreasonable.

Government Code Section 17551(d) requires the Commission to hear and decide a claim that the Controller has incorrectly reduced payments to the local agency or school district. If the Commission determines that a reimbursement claim has been incorrectly reduced, section 1185.9 of the Commission's regulations requires the Commission to send the statement of decision to the Controller and request that the costs in the claim be reinstated.

The Commission must review questions of law, including interpretation of parameters and guidelines, de novo, without consideration of conclusions made by the Controller in the context of an audit. The Commission is vested with exclusive authority to adjudicate disputes over the existence of state-mandated programs within the meaning of article XIII B, section 6.<sup>14</sup> The Commission must also interpret the Government Code and implementing regulations in accordance with the broader constitutional and statutory scheme. In making its decisions, the Commission must strictly construe article XIII B, section 6 and not apply it as an "equitable remedy to cure the perceived unfairness resulting from political decisions on funding priorities."<sup>15</sup>

With regard to the Controller's audit decisions, the Commission must determine whether they were arbitrary, capricious, or entirely lacking in evidentiary support. This standard is similar to

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<sup>7</sup> Exhibit A, Incorrect Reduction Claim 09-4425-I-17, page 8.

<sup>8</sup> Exhibit A, Incorrect Reduction Claim 09-4425-I-17, page 2.

<sup>9</sup> Exhibit B, Incorrect Reduction Claim 10-4425-I-18, page 4.

<sup>10</sup> Exhibit B, Incorrect Reduction Claim 10-4425-I-18, page 1.

<sup>11</sup> Exhibit C, Draft Proposed Decision.

<sup>12</sup> Exhibit D, Claimant Comments.

<sup>13</sup> Exhibit E, Controller's Comments.

<sup>14</sup> *Kinlaw v. State of California* (1991) 54 Cal.3d 326, 331-334; Government Code sections 17551, 17552.

<sup>15</sup> *County of Sonoma*, supra, 84 Cal.App.4th 1264, 1280, citing *City of San Jose v. State of California* (1996) 45 Cal.App.4th 1802, 1817.

the standard used by the courts when reviewing an alleged abuse of discretion of a state agency.<sup>16</sup>

The Commission must also review the Controller’s audit in light of the fact that the initial burden of providing evidence for a claim of reimbursement lies with the claimant.<sup>17</sup> In addition, section 1185.2(c) of the Commission’s regulations requires that any assertions of fact by the parties to an IRC must be supported by documentary evidence. The Commission’s ultimate findings of fact must be supported by substantial evidence in the record.<sup>18</sup>

**Claims**

The following chart provides a brief summary of the issues raised and staff’s recommendation.

Issue	Description	Staff Recommendation
<p>Statutory deadline to initiate the audit of claimant’s 2002-2003 through 2005-2006 reimbursement claims.</p>	<p>At the time the underlying reimbursement claims were filed, Government Code section 17558.5 stated: “A reimbursement claim for actual costs filed by a local agency or school district pursuant to this chapter is subject to the initiation of an audit by the Controller no later than three years after the date that the actual reimbursement claim is filed or last amended, whichever is later. However, if no funds are appropriated or no payment is made to a claimant for the program for the fiscal year for which the claim is filed, <i>the time for the Controller to initiate an audit shall commence to run from the date of initial payment of the claim.</i>” Claimant argues that tolling the deadline in the case of a claim for which no funds are appropriated or no payment is made is void for vagueness. Therefore, claimant asserts that the first sentence, which relies on the filing date of the claim only, controls, and the audit of its fiscal year 2002-2003 claim, filed on January 13, 2004, was therefore not timely, because it was not initiated on or before January 13, 2007.</p>	<p><i>The audit was timely initiated – Staff presumes that the plain language of section 17558.5 is valid and enforceable, and finds that the because the fiscal year 2002-2003 reimbursement claim was not paid until October 30, 2006, the statutory deadline to initiate an audit was tolled until October 30, 2009. The audit was initiated no later than April 17, 2007, and is therefore timely initiated as to all subject fiscal years.</i></p>

<sup>16</sup> *Johnston v. Sonoma County Agricultural* (2002) 100 Cal.App.4th 973, 983-984. See also *American Bd. of Cosmetic Surgery, Inc. v. Medical Bd. of California* (2008) 162 Cal.App.4th 534, 547.

<sup>17</sup> *Gilbert v. City of Sunnyvale* (2005) 130 Cal.App.4th 1264, 1274-1275.

<sup>18</sup> Government Code section 17559(b), which provides that a claimant or the state may commence a proceeding in accordance with the provisions of section 1094.5 of the Code of Civil Procedure to set aside a decision of the Commission on the ground that the Commission’s decision is not supported by substantial evidence in the record.

<p>Statutory deadline to complete the audits.</p>	<p>As of January 1, 2005, section 17558.5 also provided: “In any case, an audit shall be completed not later than two years after the date that the audit is commenced.”</p> <p>The claimant argues that based on the initiation date of April 17, 2007, or the date of the entrance conference letter, April 3, 2007, an audit report completed on or after April 17, 2009 is not timely.</p>	<p><i>The original final audit report was timely completed, but the revised audit report was not timely – Staff finds that the audit was initiated on April 17, 2007, and completed on April 17, 2009, exactly two years after the date commenced. However, the revised audit, issuing August 25, 2010, was not timely, because it was completed later than two years after the audit was commenced.</i></p>
<p>Reduction of salaries and benefits claimed based on asserted inaccurate productive hourly rates.</p>	<p>The claimant asserts that the Controller reduced salaries and benefits claimed in fiscal year 2002-2003 based on a determination that the claimant provided inaccurate productive hourly rates, but the Controller did not provide any explanation or evidence to support its determination.</p>	<p><i>This reduction is incorrect because it is entirely lacking in evidentiary support – Staff finds that the Controller failed to provide any evidence in the record of the reasons for the reduction, and its factual assertions that productive hourly rates were “inaccurate” must be supported by evidence in the record.</i></p>
<p>Recalculation based on asserted flaws in the development of indirect cost rates.</p>	<p>The claimant asserts that the Controller’s recalculation of indirect costs claimed was arbitrary, capricious, or entirely lacking in evidentiary support, because the Controller did not articulate a factually accurate and enforceable reason to recalculate indirect costs. Claimant further argues that upon recalculation, the Controller is required to pay the claimant for the underclaimed amount of indirect costs, and the Controller cannot unilaterally determined that it will not adjust the payment. To do so, the claimant argues, is an incorrect reduction in itself.</p>	<p><i>This reduction is incorrect as a matter of law, and is arbitrary and capricious – Staff finds that whether or not the Controller had a legally supportable reason to recalculate the claimant’s indirect costs, the result of the recalculation was a determination that the claimant had underclaimed its indirect costs based on the Controller’s calculations and methodology as applied to the direct costs claimed in the reimbursement claim, and therefore the Controller is required to adjust the payment in accordance with its findings on indirect costs.</i></p>

## **Staff Analysis**

### **A. The Controller Met the Statutory Deadlines for the Initiation and Completion of the Final Audit Report but the Revised Audit Report was not Completed Within the Two Year Statutory Deadline.**

Staff finds that the original audit report was timely initiated and timely completed, but that the revised audit report was not timely completed. Government Code section 17558.5 provides that if no funds are appropriated “or no payment is made to a claimant...the time for the Controller to initiate an audit [three years] shall commence to run from the date of initial payment of the claim.”<sup>19</sup> Here, the claimant’s fiscal year 2002-2003 claim was first paid October 30, 2006, while the remaining years were not paid until at least September 9, 2010. Therefore, the time period subject to audit, for the earliest of the relevant claim years, was extended until October 30, 2009, and the audit was initiated April 17, 2007. The claimant asserts that the provision of section 17558.5 that tolls the deadline to initiate an audit in the case no payment is made to a claimant is void because it is vague and ambiguous. Staff finds that the Commission is required to presume the statute is valid and enforceable under article III, section 3.5. Staff therefore concludes that the original audit was timely initiated.

Section 17558.5 also requires that an audit be completed “not later than two years after the date that the audit is commenced.” Based on the April 17, 2007 entrance conference, the April 17, 2009 audit report (the first “final” audit report) was timely completed, but the “revised final audit report” issued August 25, 2010, fell outside the two year completion requirement, and was therefore not timely. Based on the foregoing, staff concludes that the first “final” audit report was timely initiated and timely completed, but the revised audit report was not timely completed, in accordance with section 17558.5. Nevertheless, the Commission may take official notice of the revised audit report to the extent that it resolves any disputed issues, or mitigates the amounts in dispute in the claimant’s favor.

### **B. Reductions of Costs Claimed Based on Unsupported Hours or Productive Hourly Rates are Entirely Lacking in Evidentiary Support, and Must be Reinstated.**

Next, the claimant alleges that the Controller incorrectly reduced costs claimed for salaries and benefits, by \$6,944. The Controller recalculated the productive hourly rates claimed and found that salaries and benefits were overstated in fiscal year 2002-2003 by \$9,186; and understated in fiscal year 2004-2005 by \$2,242. The claimant states that the Controller has not explained this adjustment, but neither has the claimant provided any supporting evidence or rebuttal to the adjustment. Staff concludes that the Controller’s assertion that the calculation of productive hourly rates was inaccurate is not based on any evidence or explanation in the record and, thus, does not comply with section 1185.2(c) of the Commission’s regulations, which requires that all representations of fact shall be supported by documentary evidence. Therefore, staff finds that this adjustment is entirely lacking in evidentiary support and therefore these costs should be reinstated.

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<sup>19</sup> Government Code section 17558.5 (Stats. 2002, ch. 1128, (AB 2834)).

**C. The Controller's Determination not to Reimburse the Full Amount of Indirect Costs Recalculated is Incorrect as a Matter of Law and is Arbitrary and Capricious.**

Finally, the claimant identifies the Controller's findings that the claimant understated its indirect costs during the audit period by \$103,032. The Controller applied the understated amount to offset reductions made to other audit items, but declined to reimburse the claimant in excess of the amount claimed for each fiscal year of the audit. The claimant argues that the Controller's determination not to pay the claimant in excess of its claims is arbitrary and capricious, and constitutes an incorrect reduction in itself. Staff agrees. Section 17561 requires the state to reimburse claimants for all costs mandated by the state, within the meaning of Government Code section 17514. Because indirect costs are calculated based on a formula applied to direct costs claimed, the Controller's determination on the correct amount of indirect costs that should have been claimed constitutes a reimbursable amount. Staff concludes that the Controller should adjust the payment to account for the miscalculated indirect costs.

**Conclusion**

Based on the foregoing, staff recommends that the Commission partially approve this IRC, and request that the Controller reinstate the following reductions:

- Reduction of \$6,944 based on net unallowable salaries and benefits for fiscal years 2002-2003 and 2004-2005.
- Reduction of allowable indirect costs based on direct costs claimed: \$20,662 for fiscal year 2003-2004; \$21,611 for fiscal year 2004-2005, and \$54,244 for fiscal year 2005-2006.

**Staff Recommendation**

Staff recommends that the Commission adopt the proposed decision to partially approve the IRC, and authorize staff to make any technical, non-substantive changes following the hearing.

BEFORE THE  
COMMISSION ON STATE MANDATES  
STATE OF CALIFORNIA

IN RE INCORRECT REDUCTION CLAIM  
ON:

Government Code Sections 3540-3549.9  
Statutes 1975, Chapter 961 ; Statutes 1991,  
Chapter 1213  
Fiscal Years 2002-2003 through 2005-2006

Sierra Joint Community College District,  
Claimant.

Case Nos.: 09-4425-I-17 and 10-4425-I-18

*Collective Bargaining and Collective  
Bargaining Agreement Disclosure*

DECISION PURSUANT TO  
GOVERNMENT CODE SECTION 17500 ET  
SEQ.; CALIFORNIA CODE OF  
REGULATIONS, TITLE 2, DIVISION 2,  
CHAPTER 2.5. ARTICLE 7

*(Adopted January 23, 2015)*

**DECISION**

The Commission on State Mandates (Commission) heard and decided this consolidated incorrect reduction claim (IRC) during a regularly scheduled hearing on January 23, 2015. [Witness list will be included in the adopted decision.]

The law applicable to the Commission's determination of a reimbursable state-mandated program is article XIII B, section 6 of the California Constitution, Government Code section 17500 et seq., and related case law.

The Commission [adopted/modified] the proposed decision to [approve/partially approve/deny] the IRC at the hearing by a vote of [vote count will be included in the adopted decision].

**Summary of the Findings**

This consolidated IRC was filed by Sierra Joint Community College District (claimant) in response to the Controller's audit of the claimant's annual reimbursement claims for fiscal years 2002-2003 through 2005-2006, which resulted in a total reduction of \$12,116 for unallowable salaries and benefits, of which only \$6,944 is in dispute.<sup>20</sup> The reduction was made on the ground that the claimant did not accurately calculate productive hourly rates. In addition, the Controller found that the claimant incorrectly calculated indirect costs during the audit period resulting in underclaimed costs of \$103,032,<sup>21</sup> a portion of which the Controller has determined it is not required to pay, because it exceeds, in each claim year, the total amount claimed.

The Commission finds that Government Code section 17558.5 does not bar the original "final" audit report issued April 17, 2009. In addition, the Commission finds that the *revised* audit

<sup>20</sup> Exhibit A, IRC 09-4425-I-17, pages 8-9.

<sup>21</sup> Exhibit B, IRC 10-4425-I-18, page 7.

report issued August 25, 2010 falls outside the two year deadline to complete an audit with respect to *all* relevant claim years. April 17, 2007 constitutes “the date that the audit is commenced,” for purposes of Government Code section 17558.5, and therefore the revised final audit report issued August 25, 2010 is not timely. However, even though the revised final audit report is not timely, the Commission takes official notice of the report to the extent that the revised audit report resolves any disputed issues, or mitigates the amounts in dispute in the earlier audit.

The Commission further finds that the Controller incorrectly reduced \$6,944 in costs based on the assertion that the claimant’s calculation of productive hourly rates was inaccurate. There is no evidence in the record demonstrating the Controller’s recalculation of productive hourly rates, or why such recalculation was necessary. The Controller states that the productive hourly rates were “inaccurate,” but does not specify any particular flaw in the calculations, or any particular employee or employees for whom productive hourly rates were disallowed. Section 1185.2(c) of the Commission’s regulations requires that all representations of fact be supported by documentary evidence. With no explanation or evidence in the record to support the Controller’s factual assertion that the productive hourly rates were inaccurate, the Commission finds that audit determination entirely lacking in evidentiary support, and that the full amount reduced, \$6,944, is required to be reinstated to the claimant.

Finally, the Commission finds that the Controller’s determination not to reimburse claimants for the full amount of their indirect costs, as recalculated by the Controller, is incorrect as a matter of law and arbitrary. As explained below, the Controller found underclaimed indirect costs in each claim year, and applied the underclaimed amounts to offset reductions for other audit items up to the total amount of the claim for each relevant fiscal year. In so doing the Controller left the claimant with a net reduction of zero for fiscal years 2003-2004, 2004-2005, and 2005-2006. However, the claimant argues that the determination not to pay the remaining indirect costs calculated by the Controller and allowed by article XIII B, section 6, is itself a reduction, and the Commission agrees.

Accordingly, the Commission partially approves this IRC, and directs the Controller to reinstate the following reductions:

- Reduction of \$6,944 based on net unallowable salaries and benefits for fiscal years 2002-2003 and 2004-2005.
- Reduction of allowable indirect costs based on direct costs claimed: \$20,662 for fiscal year 2003-2004; \$21,611 for fiscal year 2004-2005, and \$54,244 for fiscal year 2005-2006.

## COMMISSION FINDINGS

### I. Chronology

01/15/2004                      Claimant filed its fiscal year 2002-2003 annual reimbursement claim.<sup>22</sup>  
01/10/2005                      Claimant filed its fiscal year 2003-2004 annual reimbursement claim.<sup>23</sup>

<sup>22</sup> Exhibit B, IRC 10-4425-I-18, page 11.

<sup>23</sup> Exhibit B, IRC 10-4425-I-18, page 11.

01/17/2006	Claimant filed its fiscal year 2004-2005 annual reimbursement claim. <sup>24</sup>
10/30/2006	Controller paid the 2002-2003 reimbursement claim. <sup>25</sup>
12/21/2006	Claimant filed its fiscal year 2005-2006 annual reimbursement claim. <sup>26</sup>
06/9/2008	Controller issued the draft audit report. <sup>27</sup>
07/03/2008	Claimant notified Controller of disputed adjustments. <sup>28</sup>
04/17/2009	Controller issued the final audit report. <sup>29</sup>
08/04/2009	Claimant filed the first of two consolidated IRCs. <sup>30</sup>
08/10/2009	Commission staff deemed the IRC complete and issued it for comment.
08/25/2010	Controller issued the revised final audit report. <sup>31</sup>
09/09/2010	Controller issued adjustment letters and a “results of review” letter. <sup>32</sup>
02/04/2011	Claimant filed the second of two consolidated IRCs. <sup>33</sup>
02/10/2011	The executive director deemed the second IRC complete, and consolidated the two IRCs and issued them for comments.
11/14/2014	Commission staff issued the draft proposed decision. <sup>34</sup>
11/26/2014	Claimant filed comments on the draft proposed decision. <sup>35</sup>
12/02/2014	Controller filed comments on the draft proposed decision. <sup>36</sup>

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<sup>24</sup> Exhibit B, IRC 10-4425-I-18, page 11.

<sup>25</sup> Exhibit B, IRC 10-4425-I-18, page 43 [Revised Audit Report]; p. 19 [Claim Adjustment Notice].

<sup>26</sup> Exhibit B, IRC 10-4425-I-18, page 11.

<sup>27</sup> Exhibit A, IRC 09-4425-I-17, page 8.

<sup>28</sup> Exhibit A, IRC 09-4425-I-17, page 8.

<sup>29</sup> Exhibit A, IRC 09-4425-I-17, page 8.

<sup>30</sup> Exhibit A, IRC 09-4425-I-17, page 2.

<sup>31</sup> Exhibit B, IRC 10-4425-I-18, page 4.

<sup>32</sup> Exhibit B, IRC 10-4425-I-18, page 4.

<sup>33</sup> Exhibit B, IRC 10-4425-I-18, page 2.

<sup>34</sup> Exhibit C, Draft Proposed Decision.

<sup>35</sup> Exhibit D, Claimant Comments on Draft Proposed Decision.

<sup>36</sup> Exhibit E, Controller’s Comments on Draft Proposed Decision.



## II. Background

### Collective Bargaining and Collective Bargaining Agreement Disclosure Mandates

On July 17, 1978, the Board of Control, predecessor to the Commission, found that Statutes 1975, chapter 961 imposed a reimbursable state mandate. Then, on March 26, 1998, the Commission adopted a second test claim decision finding that Statutes 1991, chapter 1213 imposed a reimbursable state mandate. Parameters and guidelines for the two programs were consolidated on August 20, 1998, and have since been amended again, on January 27, 2000.

At the time the reimbursement claims at issue were prepared and submitted to the Controller, the amended parameters and guidelines, adopted on January 27, 2000, were applicable. These parameters and guidelines authorize reimbursement for costs incurred to comply with sections 3540 through 3549.1 of the Government Code, and “regulations promulgated by the Public Employment Relations Board,” including:

- Determination of appropriate bargaining units for representation and determination of the exclusive representation and determination of the exclusive representatives;
- Elections and decertification elections of unit representatives are reimbursable in the event the Public Employment Relations Board determines that a question of representation exists and orders an election held by secret ballot;
- Negotiations: reimbursable functions include – receipt of exclusive representative’s initial contract proposal, holding of public hearings, providing a reasonable number of copies of the employer’s proposed contract to the public, development and presentation of the initial district contract proposal, negotiation of the contract, reproduction and distribution of the final contract agreement;
- Impasse proceedings, including mediation, fact-finding, and publication of the findings of the fact-finding panel;
- Collective bargaining agreement disclosure before the adoption of the agreement by the governing body;
- Contract administration and adjudication of contract disputes either by arbitration or litigation, including grievances and administration and enforcement of the contract; and
- Unfair labor practice adjudication process and public notice complaints.<sup>37</sup>

### Controller’s Audit and Summary of the Issues

The Controller’s reductions of direct salary and benefit costs are based on an asserted lack or insufficiency of supporting documentation for costs claimed. In addition, the Controller found that the claimant failed to obtain federal approval for its indirect cost rates for at least two of the

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<sup>37</sup> Exhibit A, Incorrect Reduction Claim, page 24 (Exhibit B to the IRC, Parameters and Guidelines amended January 27, 2000).

four audited years, and underclaimed its indirect costs by \$103,032.<sup>38</sup> However, despite finding that the claimant underclaimed its indirect costs, the Controller determined that the underclaimed amount cannot be paid in full, because “only the total costs included in the initial or amended claim may be reimbursed within one year of the filing deadline...” and section 17561 “allows the SCO to adjust the payment to correct for any underpayments or overpayments based on allowable costs claimed.”<sup>39</sup>

### **III. Positions of the Parties**

#### Sierra Joint Community College District

The portion of reduced salaries and benefits that the claimant disputes is attributed to “inaccurate productive hourly rates, resulting in costs that were overstated by \$9,186 for [fiscal year] 2002-03 and understated by \$2,242 for [fiscal year] 2004-05, leaving a net audit adjustment of \$6,944.”<sup>40</sup> The claimant states that “[n]o explanation was provided for any of these adjustments, and there is no indication as to why the payroll information reported by the District needed to be adjusted for purposes of the productive hourly rate computation.”<sup>41</sup>

For fiscal years 2003-2004 through 2005-2006, the Controller found *underclaimed* indirect costs, which were offset against all other adjustments for those years, and the net reduction in claimed costs for those years was zero.<sup>42</sup> The claimant disputes the Controller’s findings that “the District improperly determined and applied the indirect cost rate.” The claimant argues that the “difference in the claimed and audited rates is the determination of which of those cost elements are direct costs and which are indirect costs.” The claimant maintains that “federally ‘approved’ rates, which the Controller will accept without further action prior to [fiscal year] 2004-05, are ‘negotiated’ rates calculated by the District and submitted for approval, indicating that the process is not an exact science, but a determination of the relevance and reasonableness of the cost allocation assumptions made for the method used.”<sup>43</sup>

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<sup>38</sup> See Exhibit A, IRC 09-4425-I-17, pages 53-72 [Controller’s Final Audit Report, Issued April 17, 2009]; Exhibit B, IRC 10-4425-I-18, pages 25-44 [Controller’s Revised Final Audit Report, Issued August 25, 2010].

<sup>39</sup> Exhibit B, IRC 10-4425-I-18, page 43 [Revised Final Audit Report].

<sup>40</sup> Exhibit A, IRC 09-4425-I-17, pages 8-9 [The claimant states that the first “final” audit report, issued April 17, 2009, finds overstated costs for unallowable salaries and benefits totaling \$14,489, not including indirect costs. That amount includes \$4,468 in unsupported hours, which the claimant does not dispute; and \$3,077 in ineligible expenses for two District administrators to attend a manager’s conference, which the claimant does not dispute.].

<sup>41</sup> Exhibit A, IRC 09-4425-I-17, page 9.

<sup>42</sup> Exhibit A, IRC 09-4425-I-17, page 5.

<sup>43</sup> Exhibit A, IRC 09-4425-I-17, page 11.

In addition, the claimant argues that the Controller is applying an incorrect auditing standard, in part relying on Government Code 12410, and also failing to make express findings that the claimant's reimbursement claims were unreasonable or excessive.<sup>44</sup>

Finally, the claimant points out that after recalculating the claimed indirect cost rates by the alternative state method "[t]he final audit report concludes that the District failed to claim \$6,515 for [fiscal year] 2002-03, \$20,662 for [fiscal year] 2003-04, \$18,431 for [fiscal year] 2004-05, and \$49,210 for [fiscal year] 2005-06." The claimant concludes that "[t]his results in \$94,818 in total unclaimed costs that are due to the District not applying its indirect cost rate to contract services costs in accordance with the claiming instructions."<sup>45</sup> In the revised audit report, the total underclaimed amount is determined to be \$103,032.<sup>46</sup>

However, the claimant states that "the final audit report concludes that this amount cannot be paid to the District because it exceeds the amount originally claimed."<sup>47</sup> The claimant argues that the Controller "does not have the discretion to unilaterally determine that it will require reimbursement for audit adjustments in favor of the State and simply ignore audit adjustments in favor of the claimants." The claimant cites section 17561, which provides that the Controller may audit and reduce claims that are excessive or unreasonable, and "shall adjust the payment to correct for any underpayment or overpayments that occurred in previous fiscal years." The claimant concludes that the Controller "has the obligation to pay claimants any unclaimed allowable mandate cost it discovers as the result of an audit."<sup>48</sup> Finally, the claimant argues that "the adjustment from Finding 1 was mitigated by \$3,159 attributed to the District's understated productive hourly rate for [fiscal year] 2004-05," and that there is "no practical difference between allowing an understated cost to mitigate one of the Controller's adjustments and reimbursing the District for their total actual costs."<sup>49</sup>

The claimant also raises the statute of limitations for auditing annual reimbursement claims pursuant to Government Code section 17558.5, and argues that the audit of the earliest fiscal year at issue (2002-2003) and the revised audit, are barred.<sup>50</sup> The claimant asserts that the statute of limitations applicable to the Controller's audit of its 2002-2003 claim, filed January 15, 2004, expired January 15, 2007, pursuant to section 17558.5, as amended by Statutes 2002, chapter 1128. The audit entrance conference was held on April 17, 2007, which the claimant argues is not a timely initiation of an audit. In addition, the final audit report was issued on April 17, 2009, which the claimant asserts is two years and one day after the audit was initiated and therefore not timely.<sup>51</sup> And, the claimant asserts that the revised audit report "appear[s] to have

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<sup>44</sup> Exhibit A, IRC 09-4425-I-17, pages 11-13.

<sup>45</sup> Exhibit A, IRC 09-4425-I-17, page 13.

<sup>46</sup> Exhibit B, IRC 10-4425-I-18, page 7.

<sup>47</sup> Exhibit A, IRC 09-4425-I-17, page 14.

<sup>48</sup> Exhibit A, IRC 09-4425-I-17, page 14.

<sup>49</sup> Exhibit A, IRC 09-4425-I-17, pages 14-15.

<sup>50</sup> See Exhibit A, IRC 09-4425-I-17, pages 71; 77; Exhibit B, IRC 10-4425-I-18, pages 13-14.

<sup>51</sup> Exhibit B, IRC 10-4425-I-18, pages 13-14.

been initiated as a result of the original incorrect reduction claim filed on August 3, 2009,” but “was not noticed to the District until the revised audit report was published on August 25, 2010, which is more than three years after the last annual claim was filed...” Finally, the claimant asserts that “the date of the revised audit report is more than two years after the original audit.”<sup>52</sup>

In comments on the draft proposed decision, the claimant now concedes that the audit was timely initiated, but argues that the audit was not timely completed, based on additional documentation and evidence attached to the claimant’s comments.<sup>53</sup> With respect to the remaining findings in the draft proposed decision, the claimant agrees with the reinstatement of \$6,944 in salaries and benefits, but argues that the Controller’s decision to reimburse the full amount of indirect costs, which exceeded the amounts claimed for fiscal years 2003-2004 through 2005-2006, is itself an incorrect reduction.<sup>54</sup>

#### State Controller’s Office

The Controller did not submit comments on the consolidated IRCs.

However, with respect to the statute of limitations, the Controller argues, in both the original and the revised audit report, that section 17558.5 provides that when no funds are appropriated in the claim year, or payment to the claimant is not promptly made, “the time for the Controller to initiate an audit shall commence to run from the date of initial payment of the claim.”<sup>55</sup> The Controller states that “[t]he district filed its initial FY 2002-03 claims on January 15, 2004, and received the initial claim payment on October 30, 2006.”<sup>56</sup> The Controller argues that “[t]herefore, this claim was subject to the initiation of an SCO audit until October 30, 2009.” The Controller asserts that the audit entrance conference conducted on April 17, 2007 was therefore timely.<sup>57</sup>

In comments on the draft proposed decision, the Controller supports the conclusions in the draft and admits that it did not maintain documentation to support the reduction of salaries and benefits totaling \$6,944. The Controller further states that although the draft proposed decision found there was no jurisdiction over the reduction of indirect costs, the Controller believes the reduction is valid, based on the claimant’s failure to obtain federal approval for its indirect cost rates.<sup>58</sup>

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<sup>52</sup> Exhibit B, IRC 10-4425-I-18, page 15.

<sup>53</sup> Exhibit D, Claimant Comments, pages 2-3; 6; 8.

<sup>54</sup> Exhibit D, Claimant Comments, pages 4-5.

<sup>55</sup> Exhibit A, IRC 09-4425-I-17, page 71 [Controller’s Final Audit Report, citing Government Code section 17558.5 (as amended, Stats. 2002, ch. 1128, AB 2834)].

<sup>56</sup> Exhibit A, IRC 09-4425-I-17, page 71; Exhibit B, IRC 10-4425-I-18, page 43.

<sup>57</sup> *Ibid.*

<sup>58</sup> Exhibit E, Controller’s Comments, page 1.

#### IV. Discussion

Government Code section 17561(b) authorizes the Controller to audit the claims filed by local agencies and school districts and to reduce any claim for reimbursement of state mandated costs that the Controller determines is excessive or unreasonable.

Government Code Section 17551(d) requires the Commission to hear and decide a claim that the Controller has incorrectly reduced payments to the local agency or school district. If the Commission determines that a reimbursement claim has been incorrectly reduced, section 1185.9 of the Commission's regulations requires the Commission to send the decision to the Controller and request that the costs in the claim be reinstated.

The Commission must review questions of law, including interpretation of the parameters and guidelines, de novo, without consideration of legal conclusions made by the Controller in the context of an audit. The Commission is vested with exclusive authority to adjudicate disputes over the existence of state-mandated programs within the meaning of article XIII B, section 6.<sup>59</sup> The Commission must also interpret the Government Code and implementing regulations in accordance with the broader constitutional and statutory scheme. In making its decisions, the Commission must strictly construe article XIII B, section 6 and not apply it as an "equitable remedy to cure the perceived unfairness resulting from political decisions on funding priorities."<sup>60</sup>

With regard to the Controller's audit decisions, the Commission must determine whether they were arbitrary, capricious, or entirely lacking in evidentiary support. This is similar to the standard used by the courts when reviewing an alleged abuse of discretion of a state agency.<sup>61</sup> Under this standard, the courts have found that:

When reviewing the exercise of discretion, "[t]he scope of review is limited, out of deference to the agency's authority and presumed expertise: 'The court may not reweigh the evidence or substitute its judgment for that of the agency. [Citation.]'" ... "In general ... the inquiry is limited to whether the decision was arbitrary, capricious, or entirely lacking in evidentiary support. . . ." [Citations.] When making that inquiry, the " "court must ensure that an agency has adequately considered all relevant factors, and has demonstrated a rational connection between those factors, the choice made, and the purposes of the enabling statute." [Citation.]' "<sup>62</sup>

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<sup>59</sup> *Kinlaw v. State of California* (1991) 54 Cal.3d 326, 331-334; Government Code sections 17551, 17552.

<sup>60</sup> *County of Sonoma, supra*, 84 Cal.App.4th 1264, 1280, citing *City of San Jose v. State of California* (1996) 45 Cal.App.4th 1802, 1817.

<sup>61</sup> *Johnston v. Sonoma County Agricultural* (2002) 100 Cal.App.4th 973, 983-984. See also *American Bd. of Cosmetic Surgery, Inc. v. Medical Bd. of California* (2008) 162 Cal.App.4th 534, 547.

<sup>62</sup> *American Bd. of Cosmetic Surgery, Inc, supra*, 162 Cal.App.4th at 547-548.

The Commission must also review the Controller's audit in light of the fact that the initial burden of providing evidence for a claim of reimbursement lies with the claimant.<sup>63</sup> In addition, section 1185.2(c) of the Commission's regulations requires that any assertion of fact by the parties to an IRC must be supported by documentary evidence. The Commission's ultimate findings of fact must be supported by substantial evidence in the record.<sup>64</sup>

**A. The Controller Met the Statutory Deadline for the Initiation and Completion of the Audit, but the Revised Audit Report was not Completed Within the Two Year Statutory Deadline.**

The claimant raises a statute of limitations argument applicable to audits, based on Government Code section 17558.5.<sup>65</sup> Section 17558.5, as applicable to the claim years here at issue, requires a valid audit to be initiated no later than three years after the date that the reimbursement claim is filed or last amended. However, the section also provides that if no funds are appropriated or no payment is made "to a claimant for the program for the fiscal year for which the claim is filed, the time for the Controller to initiate an audit shall commence to run from the date of initial payment of the claim."<sup>66</sup> "In any case," section 17558.5 requires the audit to be completed no later than two years after it is commenced.<sup>67</sup>

*1. The Final Audit Report Issued April 17, 2009 was Timely, Pursuant to Government Code Section 17558.5.*

The claimant asserts that the audit of the 2002-2003 claim was not timely, based on the filing date of the 2002-2003 annual claim (January 15, 2004) and the dates that the audit entrance conference took place (April 17, 2007) and the audit report issued (April 17, 2009). However, the Controller asserts that the fiscal year 2002-2003 claim was not paid until October 30, 2006, and that therefore section 17558.5 provides for a timely audit to be initiated as late as October 30, 2009. The fiscal year 2002-2003 reimbursement claim was filed on January 15, 2004, but was not paid, based on the evidence in the record, until October 30, 2006.<sup>68</sup> Pursuant to section 17558.5, a filing date of January 15, 2004, if paid, would mean that the claim was "subject to the

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<sup>63</sup> *Gilbert v. City of Sunnyvale* (2005) 130 Cal.App.4th 1264, 1274-1275.

<sup>64</sup> Government Code section 17559(b), which provides that a claimant or the state may commence a proceeding in accordance with the provisions of section 1094.5 of the Code of Civil Procedure to set aside a decision of the Commission on the ground that the Commission's decision is not supported by substantial evidence in the record.

<sup>65</sup> The Controller's Final Audit Report, issued April 17, 2009, states that the claimant raised the statute of limitations in its response to the draft audit, but the claimant did not reiterate its allegation in IRC 09-4425-I-17. (See IRC 09-4425-I-17, page 71.) The claimant reiterated and expanded upon its statute of limitations argument in IRC 10-4425-I-18, pages 13-14.

<sup>66</sup> Government Code section 17558.5 (as amended, Stats. 2002, ch. 1128 (AB 2834)).

<sup>67</sup> Government Code section 17558.5 (as amended, Stats. 2004, ch. 313 (AB 2224)).

<sup>68</sup> Exhibit B, IRC 10-4425-I-18, page 43 [Revised Audit Report]; p. 19 [Claim Adjustment Notice].

initiation of an audit by the Controller no later than...” January 15, 2007,<sup>69</sup> and would be required to be completed within two years of the date commenced.<sup>70</sup> The claimant relies on the filing date to argue that the initiation of the audit was not timely. However, section 17558.5 also states that if funds are not appropriated or no payment is made to the claimant for a given year, the “time for the Controller to initiate an audit shall commence to run from the date of initial payment of the claim.”<sup>71</sup> The claimant argues that this provision “is void because it is impermissibly vague.”<sup>72</sup> However, article III, section 3.5 states that an administrative agency has no power “[t]o declare a statute unenforceable, or refuse to enforce a statute, on the basis of it being unconstitutional unless an appellate court has made a determination that such statute is unconstitutional...”<sup>73</sup> Therefore, the time to initiate an audit, in this case, commenced to run from October 30, 2006, when the 2002-2003 claim was first paid, and an audit initiated before October 30, 2009 would be timely. Here, the audit was initiated no later than April 17, 2007, the date of the entrance conference, more than two years and six months before the expiration of the limitation period to initiate an audit under section 17558.5. The first audit was therefore timely initiated, with respect to fiscal year 2002-2003.

The Commission further finds that the initiation of the audit with respect to the remaining claim years at issue in this case was also timely. The annual claim for 2003-2004 was filed January 10, 2005, and therefore an audit initiated on or before January 10, 2008 would have been timely, based on the filing date of the claim. Moreover, notices from the Controller dated September 9, 2010, and pertaining to fiscal years 2003-2004 through 2005-2006, indicate that *no claims* had yet been paid for those audit years,<sup>74</sup> and therefore “the time for the Controller to initiate an audit,” pursuant to section 17558.5, had not commenced to run as of that date.<sup>75</sup> Based on the foregoing, the audit was timely initiated with respect to all successive audit years.

The claimant has also advanced the argument that the audit was not timely completed, based on either the audit entrance conference date of April 17, 2007, or the entrance conference letter, dated April 3, 2007, and the issuance of the final audit report on April 17, 2009. The claimant’s argument fails.

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<sup>69</sup> Government Code section 17558.5 (as amended, Statutes 2002, ch. 1128 (AB 2834)).

<sup>70</sup> Government Code section 17558.5 (as amended, Statutes 2002, ch. 1128 (AB 2834)). Neither the filing date of the subject reimbursement claims, nor the date the audit was commenced, controls whether the later-amended version(s) of section 17558.5 are applicable. See *Scheas v. Robertson* (1951) 38 Cal.2d 119, 126 [“It is settled that the Legislature may enact a statute of limitations ‘applicable to existing causes of action or shorten a former limitation period...’”].

<sup>71</sup> Government Code section 17558.5 (as amended, Stats. 2002, ch. 1128 (AB 2834)).

<sup>72</sup> Exhibit B, IRC 10-4425-I-18, page 11.

<sup>73</sup> California Constitution, article III, section 3.5 (added June 6, 1978, by Proposition 5).

<sup>74</sup> Exhibit B, IRC 10-4425-I-18, pages 21-23.

<sup>75</sup> Government Code section 17558.5 (as amended, Stats. 2002, ch. 1128 (AB 2834)).

Section 17558.5 provides that “[i]n any case, an audit shall be completed not later than two years after the date that the audit is commenced.”<sup>76</sup> Webster’s Third New International Dictionary provides that “to commence” and “to initiate” are synonymous.<sup>77</sup> Code of Civil Procedure section 12 prescribes how statutes of limitation shall be calculated, as follows: “[t]he time in which any act provided by law is to be done is computed by excluding the first day, and including the last, unless the last day is a holiday, and then it is also excluded.” The courts have held that “[a]bsent a compelling reason for a departure, this rule governs the calculation of *all* statutorily prescribed time periods.”<sup>78</sup> Here, pursuant to section 17558.5, interpreted in accordance with Code of Civil Procedure section 12, an audit commenced on April 17, 2007 would be required to be completed by April 17, 2009, the date that the final audit report was issued.

However, in comments on the draft proposed decision, the claimant now asserts in the alternative, that “the audit commenced on April 3, 2007, or perhaps a few days earlier for the initial phone contact, based on the date of the entrance conference letter (Attachment A).”<sup>79</sup> The claimant asserts that the Commission “has not determined as a matter of law whether the date of the first telephone contact to the district, entrance conference letter, or entrance conference date commences the audit and thus [triggers] the two-year clock to complete the audit.”<sup>80</sup> The claimant asserts that “[t]he Controller considers the audit commencement date to be the date of first contact made by Controller to the claimant.”<sup>81</sup> Accordingly, the claimant provides a copy of an email relating to IRCs on another program that was addressed to Nancy Patton, former Assistant Executive Director of the Commission, from Jim Spano, Bureau Chief of the Division of Audits at the Controller’s Office, which states, in pertinent part:

We consider the event that initiates an audit pursuant to Government Code section 17558.5 to be the date of the initial contact by the SCO to the auditee (generally a telephone contact) to inform them and put them on notice of the SCO’s intention to perform the audit. In addition, we consider this same date as the event that commences the two-year period to complete an audit pursuant to Government Code section 17558.5.<sup>82</sup>

The claimant thus concludes, based on the Controller’s interpretation of section 17558.5 provided in the email, that the entrance conference letter, dated April 3, 2007,<sup>83</sup> or “a few days

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<sup>76</sup> Government Code section 17558.5 (as amended, Stats. 2004, ch. 313 (AB 2224)).

<sup>77</sup> The definition of “commence” includes “to begin,” “to initiate,” and “to enter upon,” while the definition of “initiate” provides: “to begin or set going: make a beginning of: perform or facilitate the first actions, steps, or stages of...”

<sup>78</sup> *In re Anthony B.* (2002) 104 Cal.App.4th 677, 681-682 [emphasis in original].

<sup>79</sup> Exhibit D, Claimant Comments, page 3.

<sup>80</sup> Exhibit D, Claimant Comments, page 3.

<sup>81</sup> Exhibit D, Claimant Comments, page 3.

<sup>82</sup> Exhibit D, Claimant Comments, page 8.

<sup>83</sup> Exhibit D, Claimant Comments, page 6.



earlier for the initial phone contact...<sup>84</sup> commences the audit, for purposes of the statutory deadlines of Government Code section 17558.5. Under this interpretation, the final audit report dated April 17, 2009, would not be timely completed.

The claimant's argument is not persuasive. An agency's interpretation of the meaning and effect of a statute "is entitled to consideration and respect by the courts; however unlike quasi-legislative regulations adopted by an agency to which the Legislature has confided the power to 'make law,' ...the binding power of an agency's interpretation of a statute or regulation is contextual: Its power to persuade is both circumstantial and dependent on the presence or absence of factors that support the merit of the interpretation."<sup>85</sup> The "appropriate degree of judicial scrutiny...lies somewhere along a continuum with nonreviewability at one end and independent judgment at the other."<sup>86</sup> An administrative decision adopted in a quasi-legislative capacity is "properly placed at that point of the continuum at which judicial review is more deferential; ministerial and informal actions do not merit such deference."<sup>87</sup> The "ultimate interpretation of a statute is an exercise of the judicial power...conferred upon the courts by the Constitution and, in the absence of a constitutional provision, [it] cannot be exercised by any other body."<sup>88</sup> The Court in *Yamaha Corp.*, *supra*, thus summarized the judicial province as follows:

Courts must, in short, independently judge the text of the statute, taking into account and respecting the agency's interpretation of its meaning, of course, whether embodied in a formal rule or less formal representation. Where the meaning and legal effect of a statute is the issue, an agency's interpretation is one among several tools available to the court. Depending on the context, it may be helpful, enlightening, even convincing. It may sometimes be of little worth. Considered alone and apart from the context and circumstances that produce them, agency interpretations are not binding or necessarily even authoritative. To quote the statement of the Law Revision Commission in a recent report, "The standard for judicial review of agency interpretation of law is the independent judgment of the court, giving deference to the determination of the agency appropriate to the circumstances of the agency action."<sup>89</sup>

Here, the claimant has provided a copy of an email expressing the opinion of Jim Spano, Bureau Chief of the Division of Audits at the Controller's Office, stating that "[w]e consider the event

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<sup>84</sup> Exhibit D, Claimant Comments, page 3.

<sup>85</sup> *Yamaha Corp. of America v. State Board of Equalization* (1998) 19 Cal.4th 1, 7.

<sup>86</sup> *Western States Petroleum Ass'n v. Superior Court* (1995) 9 Cal.4th 559, 575-576 [citing *Shapell Industries, Inc. v. Governing Board* (1991) 1 Cal.App.4th 218, 232].

<sup>87</sup> *Ibid.*

<sup>88</sup> *Yamaha Corp.*, *supra*, at p. 7 [citing *Bodinson Mfg. Co. v. California Employment Commission* (1941) 17 Cal.2d 321, 326].

<sup>89</sup> *Id.*, at pp. 7-8 [Citing *Traverso v. People ex rel. Dept. of Transportation* (1996) 46 Cal.App.4th 1197, 1206 as an example of an agency interpretation "of little worth," and quoting Judicial Review of Agency Action (Feb.1997) 27 Cal. Law Revision Com. Rep. (1997) p. 81].

that initiates an audit pursuant to Government Code section 17558.5 to be the date of the initial contact by the SCO to the auditee (generally a telephone contact)...” In addition, the email goes on: “we consider this same date as the event that commences the two-year period to complete an audit...”<sup>90</sup> The claimant argues, essentially, that the Controller should be held to this statement, which in this case would mean that the audit commenced on or before April 3, 2007, and the final audit report of April 17, 2009 was not timely completed. To illustrate the point, claimant provides the April 3, 2007 letter from the Controller to the claimant requesting an entrance conference for this audit. That letter states, in pertinent part:

This letter confirms that Curt Chiesa and Ken Howell of the State Controller's Office have scheduled an audit of Sierra Joint Community College District's legislatively mandated Collective Bargaining Program cost claims filed for fiscal years (FY) 2002-03, FY 2003-04, FY 2004-05 and FY 2005-06. Government Code Sections 12410, 17558.5, and 17561 provide the authority for this audit. The entrance conference is scheduled for Tuesday, April 17th, 2007, at 2 p.m. Audit fieldwork will begin after the entrance conference.<sup>91</sup>

However, based on the Court's discussion of the continuum of deference owed to an agency's interpretation of a statute, and the need for “factors that support the merit of the interpretation”,<sup>92</sup> the Commission finds, based on the evidence filed in this case, that the audit was commenced by the Controller on April 17, 2007.

As the Court noted above, “informal actions” do not merit the degree of judicial deference that “quasi-legislative” actions command.<sup>93</sup> While other agencies that conduct audits or other similar procedures have adopted regulations to make clear when the audit begins, the Controller has not adopted a regulation for mandate claim audits, and the email that the claimant cites is not a quasi-legislative statement of policy.<sup>94</sup> Rather, the email proffered by the claimant states, in the words of the audit bureau chief, the Controller's position on initiation or commencement of an audit; that statement is made not in duly adopted agency guidance, or regulations, but an email answering a question for Commission staff.

Therefore, the Commission, in its quasi-judicial capacity, is not required to give this statement significant weight, and need assign only such weight to this statement of the Controller's interpretation as its context supports. This type of informal statement's “power to persuade is

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<sup>90</sup> Exhibit D, Claimant Comments, page 8.

<sup>91</sup> Exhibit D, Claimant Comments, page 6.

<sup>92</sup> *Yamaha Corp. of America v. State Board of Equalization* (1998) 19 Cal.4th 1, 7.

<sup>93</sup> *Western States Petroleum, supra*, 9 Cal.4th 559, 575-576 [citing *Shapell Industries, Inc. v. Governing Board* (1991) 1 Cal.App.4th 218, 232].

<sup>94</sup> See, e.g., California Board of Equalization Regulations, section 1698.5 [Stating that an “audit engagement letter” is a letter “used by Board staff to confirm the start of an audit or establish contact with the taxpayer”].

both circumstantial and dependent on the presence or absence of factors that support the merit of the interpretation.”<sup>95</sup>

First, the email is in reference to a number of outstanding *Health Fee Elimination* IRCs, and does not refer to this or any other *Collective Bargaining* IRC. Secondly, as explained above, the email is not a statement of duly adopted policy, but a statement of the audit bureau chief’s interpretation of the law.

Conversely, the plain language of the “entrance conference letter” on which claimant also relies, suggests that the letter is not intended to commence the audit, which is consistent with the legal definition and purpose of an audit. The letter states that members of the Controller’s audit staff have “scheduled an audit”, and that “[a]udit fieldwork *will begin after* the entrance conference.” Black’s Law Dictionary defines an audit as “[a] formal examination of an individual’s or organization’s accounting records...” The letter that the claimant provides requests that the claimant make available “the necessary records,” and announces a “formal examination.” Therefore, the letter suggests that the entrance conference constitutes the initiation of the audit, rather than the letter itself.

Based on the foregoing analysis, and assigning to the Controller’s email only that weight appropriate to its context in light of the evidence in the record, the Commission finds that in this case, the audit entrance conference constitutes the initiation and commencement of the audit, on April 17, 2007.

Based on the foregoing, the Commission finds that the original audit was timely, with respect to both the initiation and the completion of the audit.

2. *The Revised Audit Issued August 25, 2010 was Issued Beyond the Deadlines Imposed by Section 17558.5, But May be Considered by the Commission to the Extent that it Narrows the Issues in Dispute or Makes Concessions to the Claimant.*

Government Code section 17558.5, as amended by Statutes 2002, chapter 1128, provides for an audit to be initiated by the Controller within three years after the date the claim is filed, or three years after the initial payment of the claim. However, section 17558.5 also provides that “[i]n any case, an audit *shall be completed* not later than two years after the date that the audit is commenced.”

Here, the Controller’s audit of the relevant claim years was “commenced,” within the meaning of section 17558.5, on April 17, 2007. Therefore, a timely audit must be completed by April 17, 2009, when the first “final” audit report was issued. The revised audit report is a continuation of the *original* “final” audit report, and was issued on August 25, 2010. It therefore falls outside the statutory two year completion requirement imposed by section 17558.5. To hold otherwise would be to provide to the Controller an “end-run” around a validly enacted statutory deadline for completion of an audit, and to hold claimants subject to open-ended “revision” of audit findings.

However, the claimant maintains that even if the revised audit is barred, “[n]otwithstanding, the changes made by the Controller in the revised audit report are for substantive reasons that are now a matter of record for the original incorrect reduction claim and can be adjudicated by the

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<sup>95</sup> *Yamaha Corp. of America v. State Board of Equalization* (1998) 19 Cal.4th 1, 7.

Commission.”<sup>96</sup> The Commission agrees that it may take official notice<sup>97</sup> of the revised audit report, and treat the revised audit as substantive comments from the Controller on the IRC, to the extent that the revised audit report narrows the issues in dispute or mitigates the amount of reductions originally asserted by the Controller.

Based on the foregoing, the Commission finds that the revised final audit report issued August 25, 2010 was not completed within the deadline required by section 17558.5, but may be considered by the Commission to the extent that it narrows the issues in dispute or makes concessions to the claimant with respect to its allegations in the IRC.

**B. Reductions of Costs Claimed Based on Unsupported Hours or Productive Hourly Rates are Entirely Lacking in Evidentiary Support, and Must be Reinstated.**

The disputed reductions for productive hourly rates were determined to be “overstated by \$9,186 for FY 2002-2003 and understated by \$2,242 for FY 2004-2005, leaving a net audit adjustment of \$6,944.”<sup>98</sup> In the final audit report the Controller notes the claimant’s dispute with respect to this reduction, but states that “[t]he district’s response did not provide any specific objection to this issue.”<sup>99</sup>

In its IRC, the claimant asserts that the reason for the Controller’s adjustment is not clear, as follows:

The single difference between the rates calculated by the Controller and the District is the salary component. The Controller altered the salary component for specific employees and then necessarily arrived at productive hourly rates that differed from the rates calculated by the District. No explanation was provided for any of these adjustments, and there is no indication as to why the payroll information reported by the District needed to be adjusted for purposes of the productive hourly rate computation. The propriety of these adjustments cannot be determined until the Controller states the reason for each change to the employee payroll information.<sup>100</sup>

There is no evidence in the record indicating how productive hourly rates were calculated and claimed. The claiming instructions describe a menu of options for claimants to calculate productive hourly rates, but the record does not make clear which option was chosen by the claimant. However, there is a similar lack of evidence in the record demonstrating the Controller’s recalculation of productive hourly rates, or why such recalculation was necessary. The Controller states that the productive hourly rates were “inaccurate,” but does not specify any particular flaw in the calculations, or any particular employee or employees for whom productive

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<sup>96</sup> Exhibit B, IRC 10-4425-I-18, page 15.

<sup>97</sup> Code of Regulations, title 2, section 1187.5(c) [“Official notice may be taken in the manner and of the information described in Government Code section 11515.”].

<sup>98</sup> Exhibit A, IRC 09-4425-I-17, pages 8-9.

<sup>99</sup> Exhibit A, IRC 09-4425-I-17, page 65 [Final Audit Report, issued April 17, 2009].

<sup>100</sup> Exhibit A, IRC 09-4425-I-17, page 9.

hourly rates were disallowed. Section 1185.2(c) of the Commission’s regulations requires that all representations of fact shall be supported by documentary evidence and submitted with the comments. The Commission finds that there is no explanation or evidence in the record to support the Controller’s factual assertion that the productive hourly rates were inaccurate.

Therefore, based on the evidence in the record, the Commission finds that the Controller’s audit determination is entirely lacking in evidentiary support, and that the full amount reduced, \$6,944, is required to be reinstated to the claimant.

**C. The Controller’s Determination not to Reimburse the Full Amount of Indirect Costs Recalculated is Incorrect as a Matter of Law and is Arbitrary and Capricious.**

The claimant asserts that the Controller incorrectly determined that its indirect cost rates were improperly calculated and applied, resulting in an *underclaimed* amount of \$103,032.<sup>101</sup> The Controller’s recalculation of indirect costs resulted in a determination of an underclaimed amount for three of the four audit years, which the Controller offset against other disallowed amounts, resulting in reimbursement of the full amount claimed for each of those three years (2003-2004 through 2005-2006).

Claimant argues that merely offsetting the underclaimed amounts against other disallowances still constitutes a reduction, to the extent that the claimant is not fully reimbursed for its actual indirect costs, as calculated by the Controller based on direct costs claimed. Claimant requests that the Commission direct the Controller to reimburse the full amounts underclaimed and argues that section 17561(d)(2) requires “the adjustment of *both* underpayments and overpayments...”<sup>102</sup> The claimant argues that “the Controller does not have discretion to unilaterally determine that it will require reimbursement for audit adjustments in favor of the State and simply ignore audit adjustments in favor of the claimants.”<sup>103</sup> In comments on the draft proposed decision, the claimant characterizes the Controller’s decision not to reimburse the claimant in excess of the claimed amount for each of the relevant audit years as a reduction in itself, calling that determination “an incorrect reduction of *total reimbursable costs* and an *underpayment of reimbursable amounts*.”<sup>104</sup>

The final audit report issued April 17, 2009 states that “[t]he district developed indirect cost rate proposals (ICRPs) in accordance with Office of Management and Budget (OMB) Circular A-21...” but that “[f]or FY 2004-05 and 2005-06, the parameters and guidelines and SCO’s claiming instructions do not provide districts the option of using a federally-approved rate.”<sup>105</sup> In addition, the Controller asserts that “[f]or FY 2002-03 and FY 2003-04, the SCO’s claiming instructions allow the district to use federally-approved rate prepared in accordance with OMB Circular A-21[,]” but that “the district did not obtain federal approval for the applicable two

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<sup>101</sup> Exhibit B, IRC 10-4425-I-18, page 7.

<sup>102</sup> Exhibit A, Incorrect Reduction Claim, page 77.

<sup>103</sup> Exhibit A, Incorrect Reduction Claim, page 77.

<sup>104</sup> Exhibit D, Claimant Comments, page 4 [emphasis added].

<sup>105</sup> Exhibit A, Incorrect Reduction Claim, page 67 [Final Audit Report, issued April 17, 2009].

years.”<sup>106</sup> The Controller concedes, in its *revised* final audit report issued August 25, 2010, that federally-approved rates were permitted for fiscal years 2004-2005 and 2005-2006, but the Controller asserts that this does not alter its finding that the claimant did not obtain federal approval for its rates, and the rates were required to be recalculated.<sup>107</sup> The revised final audit report found that the total indirect costs underclaimed were \$103,032, pursuant to the state FAM-29C methodology, including depreciation expenses.<sup>108</sup> The claimant states that this amount results in \$20,662 for fiscal year 2003-2004, \$21,611 for fiscal year 2004-2005, and \$54,244 for fiscal year 2005-2006 in excess of the total costs claimed for each of those years.<sup>109</sup> This amount, then, is the amount in dispute that the Controller has determined it will not pay to the claimant. The Controller applied the underclaimed indirect costs to offset other unallowable costs reduced, but declined to pay the claimant any more than its total claim for each fiscal year, stating: “*only the total costs* included in the initial or amended claim may be reimbursed within one year of the filing deadline...” and section 17561 “allows the SCO to adjust the payment to correct for any underpayments or overpayments *based on allowable costs claimed.*”<sup>110</sup>

The Government Code section cited by the Controller does not contain any such limitation. The Controller relies on language not found in section 17561 to assert that “subdivision (d)(2) allows the SCO to adjust the payment to correct for any underpayments or overpayments *based on allowable costs claimed.*”<sup>111</sup> The claimant, on the other hand, relies on the first part of section 17561(d)(2)(C), which requires the Controller to “adjust the payment to correct for any underpayments or overpayments...” while ignoring the remaining few words of the sentence, “...that occurred in previous fiscal years.” The first sentence of section 17561 also states, interpreting article XIII B, section 6, that “[t]he state shall reimburse each local agency and school district for *all ‘costs mandated by the state,’* as defined in Section 17514...” Article XIII B, section 6 requires reimbursement of both direct and indirect costs, and therefore the Commission finds that section 17561, interpreted consistently with the subvention requirement of article XIII B, section 6, supports the claimant’s view that the indirect cost amounts that the Controller determined were legally correct, based on direct costs claimed, are required to be reimbursed to the claimant.

Government Code section 17551 provides that the Commission “shall hear and decide upon a claim by a local agency or school district filed on or after January 1, 1985, *that the Controller has incorrectly reduced payments* to the local agency or school district...” pursuant to an audit.<sup>112</sup> The Controller’s audit authority is detailed in Government Code section 17561, which

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<sup>106</sup> Exhibit A, IRC 09-4425-I-17, page 67 [Final Audit Report, issued April 17, 2009].

<sup>107</sup> Exhibit B, IRC 10-4425-I-18, page 42 [Revised Final Audit Report, issued August 25, 2010].

<sup>108</sup> Exhibit B, IRC 10-4425-I-18, page 42 [Revised Final Audit Report, issued August 25, 2010].

<sup>109</sup> The claimant earlier stated that \$2,242 from fiscal year 2004-2005 was offset against the reduction made in 2002-2003 for productive hourly rates. The underclaimed amount for indirect costs for fiscal year 2004-2005 is stated in the revised final audit report as \$21,611.

<sup>110</sup> Exhibit B, IRC 10-4425-I-18, page 43 [Revised Final Audit Report] [emphasis added].

<sup>111</sup> Exhibit A, IRC 09-4425-I-17, page 71 [emphasis added].

<sup>112</sup> Government Code section 17551 (Stats. 2007, ch. 329 (AB 2224)) [emphasis added].

provides that the Controller may audit the claims of a local agency or school district “to verify the actual amount of the mandated costs...” and “*may reduce any claim that the Controller determines is excessive or unreasonable.*”<sup>113</sup> The claimant focuses on the next sentence of section 17561, which states that the Controller “*shall adjust the payment to correct for any underpayments or overpayments that occurred in previous fiscal years.*”

Indirect costs are calculated in each claim year based on formulas laid out by the Controller (the state FAM-29C methodology) or the OMB (the A-21 methodology). Indirect costs are calculated in relation to direct costs claimed for each mandated program, by applying a rate derived from either the state or the federal methodology to all eligible direct costs. If the formula is not computed correctly, or not applied correctly to all eligible direct costs, then the amounts of indirect costs claimed for a given year will not represent the claimant’s full reimbursement. Alternatively, if the rate is applied too broadly, or calculated incorrectly based on the allocation of direct and indirect costs, it may yield indirect costs that are excessive or unreasonable, and must be reduced by the Controller pursuant to an audit.

Here, as noted above, the Controller recalculated the claimant’s indirect cost rates, and determined that the claimant underclaimed its indirect costs, based on applying the rates to direct costs claimed (and, in the revised audit, including depreciation expenses). However, the Controller determined that it was not required to reimburse the claimant the full amount of indirect costs based on the recalculation, because to do so would exceed the total claimed amount for the relevant audit years, and the Controller believed it was not required to reimburse in excess of total costs claimed. The Controller therefore adjusted the claims, offsetting the underclaimed indirect cost amount against other costs that were disallowed, but only to the extent of the total claim for each year. The claimant argues that the adjustment only to the extent of the total claim is itself a reduction, and the Commission agrees. Because indirect costs are calculated based on a formula applied to direct costs, if the Controller determines that the formula has been incorrectly computed or incorrectly applied, and a corrected amount would be higher than that claimed, then the higher amount is the legally correct amount of reimbursable costs, and is part of “costs mandated by the state,” within the meaning of section 17514, and based on the direct costs actually claimed under penalty of perjury. Section 17561 requires the state to reimburse all costs mandated by the state, and only permits the controller to reduce a claim that it determines is “excessive or unreasonable.” Here, the amount the Controller determined should have been claimed was significantly higher than what was claimed, based upon the claimed direct costs in the reimbursement claim, and therefore the amount cannot have been “excessive or unreasonable.” Moreover, as explained, the amount that the Controller determined constitutes a part of “all costs mandated by the state,” which must be reimbursed as a matter of law.

Finally, the claimant argues, and the Commission agrees, that the Controller’s determination not to fully reimburse indirect costs that should have been claimed is arbitrary and capricious. This is so because the Controller carried over some types of costs over or under-claimed during the relevant audit years, but declined to carry over indirect costs during the audit years and instead limited the total reimbursement for indirect costs to the total costs claimed in each of the three audit years respectively. As discussed above, the Controller found that the claimant overstated

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<sup>113</sup> Government Code section 17561 (Stats. 2009, ch. 4 (SBX3 8)).

its productive hourly rates in 2002-2003 by \$9,186, and understated productive hourly rates in 2004-2005 by \$2,242, and thus applied the 2004-2005 underclaimed amount against the overstated amount for 2002-2003, resulting in a net reduction of \$6,944. However, the Controller declined to carry over the underclaimed amounts for indirect costs from fiscal years 2003-2004 through 2005-2006, to offset the amount adjusted for fiscal year 2002-2003. As the claimant notes, “[t]here is no practical difference between allowing an understated cost to mitigate one of the Controller’s adjustments and reimbursing the District for their total actual costs.” Indeed, by carrying over the understated amounts for productive hourly rates for fiscal year 2004-2005, the Controller is, in effect, reimbursing the claimant for that fiscal year in an amount greater than what was claimed. More importantly, as discussed above, the language of section 17561 does not prohibit the Controller from reducing in excess of the total claim when its audit findings support an adjustment, and indeed only a reduction of “excessive or unreasonable” costs is permitted.

Based on the foregoing, the Commission finds that the Controller’s decision not to reimburse fully the amounts that it recalculated for the claimant’s indirect costs was incorrect as a matter of law, and represents an arbitrary and capricious reduction that must be reinstated. Therefore, the Commission directs the Controller to reinstate \$20,662 in indirect costs for fiscal year 2003-2004; \$21,611 in indirect costs for fiscal year 2004-2005, and \$54,244 in indirect costs for fiscal year 2005-2006.<sup>114</sup>

## **V. Conclusion**

Based on the foregoing, the Commission partially approves this IRC, and requests that the Controller reinstate the following reductions:

- Reduction of \$6,944 based on net unallowable salaries and benefits in fiscal years 2002-2003 and 2004-2005.
- Reduction of allowable indirect costs based on direct costs claimed: \$20,662 for fiscal year 2003-2004; \$21,611 for fiscal year 2004-2005, and \$54,244 for fiscal year 2005-2006.

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<sup>114</sup> See Exhibit B, IRC 10-4425-I-18, page 33 [Revised Final Audit Report Summary of Adjustments].



**DECLARATION OF SERVICE BY EMAIL**

I, the undersigned, declare as follows:

I am a resident of the County of Solano and I am over the age of 18 years, and not a party to the within action. My place of employment is 980 Ninth Street, Suite 300, Sacramento, California 95814.

On January 9, 2015, I served the:

**Proposed Decision**

*Collective Bargaining and Collective Bargaining Agreement Disclosure*

09-4425-I-17 and 10-4425-I-18

Government Code Sections 3540-3549.9

Statutes 1975, Chapter 961; Statutes 1991, Chapter 1213

Fiscal Years 2002-2003 through 2005-2006

Sierra Joint Community College District, Claimant

by making it available on the Commission's website and providing notice of how to locate it to the email addresses provided on the attached mailing list.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that this declaration was executed on January 9, 2015 at Sacramento, California.



---

Heidi J. Palchik  
Commission on State Mandates  
980 Ninth Street, Suite 300  
Sacramento, CA 95814  
(916) 323-3562

# COMMISSION ON STATE MANDATES

## Mailing List

**Last Updated:** 11/19/14

**Claim Number:** 09-4425-I-17 and 10-4425-I-18

**Matter:** Collective Bargaining and Collective Bargaining Agreement Disclosure

**Claimant:** Sierra Joint Community College District

### TO ALL PARTIES, INTERESTED PARTIES, AND INTERESTED PERSONS:

Each commission mailing list is continuously updated as requests are received to include or remove any party or person on the mailing list. A current mailing list is provided with commission correspondence, and a copy of the current mailing list is available upon request at any time. Except as provided otherwise by commission rule, when a party or interested party files any written material with the commission concerning a claim, it shall simultaneously serve a copy of the written material on the parties and interested parties to the claim identified on the mailing list provided by the commission. (Cal. Code Regs., tit. 2, § 1181.3.)

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RECEIVED  
January 09, 2015  
Commission on  
State Mandates

**BETTY T. YEE**  
California State Controller

January 9, 2015

Heather Halsey  
Executive Director  
Commission on State Mandates  
980 Ninth Street, Suite 300  
Sacramento, CA 95814

Re: **Proposed Decision** (Incorrect Reduction Claim)  
*Collective Bargaining and Collective Bargaining Agreement Disclosure*  
09-4425-I-17 and 10-4425-I-18  
Government Code Sections 3540-3549.9  
Statutes 1975, Chapter 961; Statutes 1991, Chapter 1213  
Fiscal Years 2002-2003 through 2005-2006  
Sierra Joint Community College District, Claimant

Dear Ms. Halsey:

The State Controller's Office requests a postponement of the hearing for the above-named Incorrect Reduction Claim from January 23, 2015, to March 27, 2015.

The proposed decision dated January 9, 2015, recommends that allowable costs in excess of claimed costs should be reimbursable. This position was not addressed in the draft staff analysis and is very significant. The additional time is needed to obtain legal guidance on this issue.

If you have any questions, please contact me by telephone at (916) 323-5849.

Sincerely,

A handwritten signature in cursive script that reads "Jim L. Spano".

JIM L. SPANO, Chief  
Mandated Cost Audits Bureau  
Division of Audits

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**DECLARATION OF SERVICE BY EMAIL**

I, the undersigned, declare as follows:

I am a resident of the County of Solano and I am over the age of 18 years, and not a party to the within action. My place of employment is 980 Ninth Street, Suite 300, Sacramento, California 95814.

On January 12, 2015, I served the:

**SCO Request for Postponement of Hearing; and  
Approval of Request for Postponement of Hearing**  
*Collective Bargaining and Collective Bargaining Agreement Disclosure*  
09-4425-I-17 and 10-4425-I-18  
Government Code Sections 3540-3549.9  
Statutes 1975, Chapter 961; Statutes 1991, Chapter 1213  
Fiscal Years 2002-2003 through 2005-2006  
Sierra Joint Community College District, Claimant

by making it available on the Commission's website and providing notice of how to locate it to the email addresses provided on the attached mailing list.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that this declaration was executed on January 12, 2015 at Sacramento, California.



---

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# COMMISSION ON STATE MANDATES

## Mailing List

**Last Updated:** 11/19/14

**Claim Number:** 09-4425-I-17 and 10-4425-I-18

**Matter:** Collective Bargaining and Collective Bargaining Agreement Disclosure

**Claimant:** Sierra Joint Community College District

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BETTY T. YEE  
California State Controller

RECEIVED  
February 27, 2015  
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State Mandates

February 27, 2015

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Keith B. Petersen  
SixTen & Associates  
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Re: Controller's Comments on Proposed Decision  
*Collective Bargaining and Collective Bargaining Agreement Disclosure*  
09-4425-I-17 and 10-4425-I-18  
Government Code Section 3540-3549.9  
Statutes 1975, Chapter 961; Statutes 1991, Chapter 1213  
Fiscal Years 2003-03 through 2005-06  
Sierra Joint Community College District, Claimant

Dear Ms. Halsey and Mr. Petersen:

This letter constitutes the Controller's response to the Proposed Decision (PD) in the above-entitled matter. The Controller disagrees with the determination that the audit is initiated when the entrance conference occurs, and also disagrees with analysis with respect to the appropriate course of action where the mandated costs exceed the costs claimed.

The question of when an audit is initiated is a core issue when analyzing whether an audit was commenced in a timely fashion, as well as if it was completed in a timely manner. In this case the audit was clearly commenced before the deadline so the question does not receive as detailed of an analysis as is found in the Draft Proposed Decision (DPD) in the Los Rios Health Fee Elimination IRC (05-4206-I-06), which is also scheduled for hearing on March 27, 2015. We believe the analysis in this PD blurs the lines between determining a question of law, and a question of fact. As noted in the PD (page 15, ¶ 3) "[t]he Commission must review questions of law ... de novo, without consideration of legal conclusions made by the Controller in the context of an audit." This case clearly present a question of law as its final determination requires that we define what is meant by the phrase "initiation of an audit" as found in Government Code section 17558.5(a).

Questions of law are resolved through statutory interpretation; the analysis of the relevant statutory provision in context, in an effort to determine the intent of the Legislature. However, in this case the only statutory interpretation engaged in was two dictionary citations. We believe that such an important question deserves a more thorough statutory interpretation analysis.

As noted in the Los Rios DPD (Page 21, 3<sup>rd</sup> ¶) “a phone call, a confirming letter, or an entrance conference, are all events that could reasonably be viewed as the initiation date under the statute”. That conclusion applies with equal force in this case. Given this ambiguity, and the importance of the conclusion, a detailed in depth statutory interpretation of Section 17558.5 was appropriate. However, the PD only cites to Black’s Law Dictionary for the definition of “audit” as “[a] formal examination of an individual’s or organization’s accounting records ...”, and to Webster’s Dictionary for the proposition that initiate is synonymous with commence. The PD does not explain what a formal examination entails, but appears to conclude that it requires an onsite visit. Not only does this analysis ignore numerous rules of statutory construction, but it is inconsistent with the prior rationale of the Commission with respect to what constitutes an audit. In the Grossmont Increased Graduation Requirements IRC, the Commission addressed the assertion that a desk review (sometimes called an informal audit) did not satisfy the audit requirement of Section 17561. In that case the Commission noted that “[t]here is nothing in this section [17561] that defines the scope of the SCO’s audit, or the manner in which the audit may be conducted.” Relying on the constitutional and statutory audit authority granted to the Controller, the Commission concluded that the “SCO exercised its audit authority in accordance with state law”, when a claim was reduced based on a desk review of the claim and its supporting documentation. We do not believe it is appropriate to limit the concept of an audit in this case to an onsite formal examination of the records of the claimant.

In addition, the analysis of this question is not consistent with how the Division of Audits actually conducts audits. The Division begins reviewing claims and their supporting documentation before they even call the auditee to arrange the entrance conference. They do this to determine the time left to audit the different claimants, and how to allocate available manpower. The document request in the formal audit letter is made because the auditors want to look at all relevant documents not just those submitted with the claim, and to ensure that the most recent versions are available. For a full description of the process involved in determining whom and when to audit, see the attached declaration of Jim Spano.

The primary purpose of statutory construction is “to determine the Legislature’s intent so as to effectuate the law’s purpose.” *In re C.H.* (2011) 53 Cal.4th 94, 100. “We give the words of the statute their ordinary and usual meaning and view them in their statutory context.” *Ibid.* We should “examine[] the disputed phrases in the context of the statute

as a whole.” *Grafton Partners v. Superior Court* (2005) 36 Cal.4th 944, 959. In this case the PD focuses on only two words from the statute, not the statute as a whole. In addition, the analysis does not look at how Section 17558.5 fits within the statutory scheme governing mandates. The courts have held that statutes must be harmonized “both internally and with each other, to the extent possible.” *Scottsdale Ins. Co. v. State Farm Mut. Auto Ins. Co.* (2005) 130 Cal.App.4th 890, 898. We believe that the analysis in the PD is too narrow to satisfy the rules and purposes of statutory interpretation.

When looking at Section 17558.5, subdivision (a) we can clearly see that it is a statute of limitations provision. To aid us in interpretation we should look at the purpose of a statute of limitation, as well as compare it to other statutes of limitations. Statutes of limitations are “designed to promote justice by preventing surprises through the revival of claims that have been allowed to slumber until evidence has been lost, memories have faded, and witnesses have disappeared.” *Romano v. Rockwell International, Inc.* (1996) 14 Cal.4th 479, 488. The courts have also stated that the “legislative goal underlying limitations statutes is to require diligent prosecution of known claims so that legal affairs can have their necessary finality and predictability and so that claims can be resolved while evidence remains reasonably available and fresh.” *Jordache Enterprises, Inc. v. Brobeck, Phleger & Harrison* (1998) 18 Cal.4th 739, 756. In this case, as in other audits conducted by the Controller, the claimant’s sense of finality is not disturbed as they have received notice before the expiration of the statute of limitations. If we are looking for predictability, relying on the entrance conference is misplaced. It can be delayed or continued by scheduling issues as well as staff availability or natural disasters, and is only certain once it occurs. For finality and predictability we should identify a more certain and definite event.

Use of the entrance conference is even more questionable when we compare the application of the statutes of limitations in other areas of the law. In civil and criminal law (misdemeanor), the event that ends the running of the statute is the filing of a complaint. For administrative law, the accusation or statement of issues is the operative document. The Continuing Education of the Bar, California Administrative Hearing Guide states that “[i]n practice, the accusation or statement of issues is considered filed on the date when it was signed and dated by the executive officer or other employee of an agency.” (§3.26, page 3-19.) Each of these processes relies at its core on a written document, not a face to face meeting between the parties. Another characteristic in common is that the filing is accomplished by a unilateral act of the plaintiff/complainant, no contact or coordination with the opposing party is required. The conclusion of the PD would create a statute of limitations procedure that is unlike any other, essentially requiring the consent of the auditee and a face to face meeting, before an audit could be initiated. There is nothing in Section 17558.5(a) that suggests such a departure from other statute of limitation procedures. In light of the purposes of statutes of limitations, as well as the common characteristics of other statutes of limitation schemes, we believe



that the formal audit letter should constitute the initiating act, and the date thereon, the date of initiation of the audit. In this case the audit letter was dated April 3, 2007, which should be the date the audit is considered initiated. Since the statute didn't run at its earliest until January 10, 2008, the audit of the fiscal years in question should be considered timely.

The PD also blurs the line between a question of law, and a question of fact in respect to the allowable costs question. The question of whether the Controller can increase the amount paid to a claimant over the claimed amount is a question of law, not fact. It depends primarily on the interpretation of Subdivision (d)(2)(B), which states that the "Controller may *reduce* any *claim* that the Controller determines is excessive or unreasonable." (Emphasis added.) However, the PD spends the majority of the time citing to the factual record. The problem is, there is no real dispute as to the facts. This approach confuses the issue and detracts from the necessary task of statutory interpretation. This conflation flows all the way to conclusion where the PD states that the Controller's decision not to reimburse above the amount claimed was "incorrect as a matter of law, and represents an arbitrary and capricious reduction ...". (PD page 26, ¶2). The inclusion of the phrase "arbitrary and capricious" is inapposite, as that determination is only applicable in the resolution of a question of fact.

Section 17561, subdivision (d)(2)(B), unequivocally gives the Controller's Office only the power to reduce claims, not increase or adjust them. "When interpreting statutory language, we may neither insert language which has been omitted nor ignore language which has been inserted. *People v. National Automobile & Casualty Ins. Co.* (2002) 98 Cal. App.4th 277, 282. In this case it appears the PD has inserted "adjust" and "insufficient", and is ignoring the word "reduce". "If the language is clear and unambiguous there is no need for construction, nor is it necessary to resort to indicia of the intent of the Legislature." *People v. Zambia* (2011) 51 Cal.4th 965, 972. Subdivision (d)(2)(B) clearly and unambiguously grants the Controller only the power to reduce a claim, not to adjust it. Even if we engage in statutory construction we will find that such construction will support the plain language. In this analysis it's also important to note that the Legislature chose to use the word claim, rather than "costs mandated by the state" or other similar provision, when referring to the item that is subject to reduction.

Even though subdivision (a) of Section 17561 may state that the "state shall reimburse each local agency and school district for all 'costs mandated by the state'...", that does not permit the Commission to rewrite subdivision (d)(2)(B). The importance of the focus of the term "claim", as opposed to "costs mandated by the state" is evidenced by Section 17560, which sets the deadline for filing a claim for reimbursement, and Section 17568 which states that "[i]n no case shall a reimbursement claim be paid that is submitted more than one year after the deadline specified in Section 17560." The mere fact that a local agency or school district has incurred a cost mandated by the state, is not sufficient itself

to entitle them to reimbursement. It is the filing of claim, within the allotted time frames, detailing the costs actually incurred, that entitles the claimant to reimbursement.

The mandates statutes emphasis on reduction, rather than failure to increase is also found in other statutes and regulations governing mandates. The statute that provides claimants the authority to file an incorrect reduction claim (IRC), Section 17588.7, requires that “the Controller *reduce*[] a claim” as a condition precedent to the filing of an IRC. (Emphasis added.) Nowhere in this statute does it provide that a claimant may file an IRC because the Controller has failed to increase the amount of the claim. This is mirrored by Commission regulations; Section 1185.1 of Title 2, provides that a claimant may file an IRC to determine if “the Office of State Controller incorrectly *reduced* a reimbursement claim.” (Emphasis added.) This is further reinforced by Section 1185.9 that provides that if the Commission determines “that a reimbursement claim was incorrectly *reduced*, the Commission shall send the decision to the Office of State Controller and request that the Office of State Controller reinstate the costs that were incorrectly *reduced*.” (Emphasis added.) Nowhere in these provisions does it provide or permit that a claim can be increased, in fact without a reduction, the Commission is without jurisdiction to hear the matter. The PD then goes on to assert that a failure to provide an increase, is itself a reduction. This rather Orwellian contortion of the English language aside, the PD fails to provide any adequate support for this conclusion, or any justification for ignoring the plain language of Subdivision (d)(2)(B), which only provides that the Controller may reduce a claim.

Another consequence of the approach put forth in the PD is to add uncertainty to budgetary questions, where there had been certainty before. Pursuant to Section 17568 the dollar amount of mandate claims for a given fiscal year is fixed, 19½ months after the end of the fiscal year. Any state entity that may rely on that information, such as the Legislature or Finance, will know the maximum exposure of the state for mandated claims for that fiscal year. However, with this new approach, which has never been articulated before, that certainty would be removed, in some cases over a decade after the costs were incurred. Such an approach would substantially limit the effectiveness of the deadlines articulated by Section 17568.


Requiring the Controller to pay more than the amount claimed, contrary to the plain language limiting our power to that of reduction, would also put the Controller’s Office in jeopardy of violating Article XVI, Section 7, of the California Constitution. That section provides that “[m]oney may be drawn from the Treasury only through an appropriation made by law and upon a Controller’s duly drawn warrant.” The Attorney General has opined that “[a] duly drawn warrant is one that is drawn for a lawful amount;” it “signifies correctness propriety, validity and that which is legally required.” 71 Ops.Cal.Atty.Gen. 275, 278-9. Since the Controller only has the power to reduce, pursuant to Subdivision (d)(2)(B), an increase in the payment to the claimant, beyond the

Heather Halsey  
February 27, 2015  
Page 6

amount claimed, cannot be said to be legally required. Therefore, making such additional payment would be a violation of the Controller's constitutional obligations. Such a payment would also run afoul of Article XVI, Section 6, of the California Constitution, which prohibits the making of a gift of public funds.

In light of the clear statutory restriction on the Controller, limiting his action to the reduction of a claim, the Commission should find that the reimbursement to the Claimant is limited to the amount claimed.

Sincerely,

A handwritten signature in blue ink that reads "Shawn D. Silva". The signature is written in a cursive style.

SHAWN D. SILVA  
Senior Staff Counsel

Attachment

SDS/ss

1 **OFFICE OF THE STATE CONTROLLER**

2 300 Capitol Mall, Suite 1850

3 Sacramento, CA 94250

4 Telephone No.: (916) 445-6854

5 **BEFORE THE**

6 **COMMISSION ON STATE MANDATES**

7 **STATE OF CALIFORNIA**

8 **INCORRECT REDUCTION CLAIM (IRC)**  
9 **ON:**

10 *Collective Bargaining and Collective*  
11 *Bargaining Agreement Disclosure Program*

12 Government Code Sections 3540-3549.9  
13 Statutes 1975, Chapter 961; Statutes 1991,  
14 Chapter 1213

15 Sierra Joint Community College District,  
16 Claimant

No.: IRC 09-4425-I-17 and  
10-4425-I-18

**AFFIDAVIT OF BUREAU CHIEF**

17 I, Jim L. Spano, make the following declarations:

18 1) I am an employee of the State Controller's Office (SCO) and am over the age of 18 years.

19 2) I am currently employed as a Bureau Chief, and have been so since April 21, 2000. Before  
20 that, I was employed as an Audit Manager for two years and three months.

21 3) I am a California Certified Public Accountant.

22 4) I reviewed the work performed by the SCO auditors.

23 5) The SCO Division of Audits develops an annual workplan using a risk-based approach that  
24 identifies claims subject to audit. We audited the district's Collective Bargaining and  
25 Collective Bargaining Agreement Disclosure Program claims for fiscal year (FY) 2002-03  
26 through FY 2005-06. The claims were selected from the annual work plan and assigned by the  
27 Audit Manager. The Auditor-in-Charge pulled the claim packages from the SCO's Division of  
Accounting and Reporting claim files and reviewed and analyzed the filed claim forms and  
attached supporting documentation.

6) For this audit, the documentation included schedules detailing the district's calculations  
of its indirect cost rates and various other documentation supporting claimed costs. The  
Auditor-in-Charge noted the official filing dates for the various claims and determined that  
they were still subject to audit in accordance with the language of Government Code section  
17558.5 at that time.



1 7) Prior to making telephone contact with the district, the Auditor-in-Charge reviewed all  
2 of these claimant-prepared records to ascertain whether to officially initiate an audit of the  
3 district's claims. The Auditor-in-Charge then requested payment information from the  
4 Division of Accounting and Reporting's database to confirm that the claims were still  
subject to audit based on claim payment information. The Audit Manager then discussed the  
audit with the Bureau Chief prior to proceeding.

5 8) The Auditor-in-Charge contacted the district, stating that the SCO will be initiating an  
6 audit of the district's mandated cost claims for the Collective Bargaining and Collective  
7 Bargaining Agreement Disclosure Program and requesting to schedule an entrance  
conference. The Auditor-in-Charge and district agreed to an April 17, 2007, start date for  
the fieldwork portion of the audit.

8 9) The Auditor-in-Charge processed a formal start letter, dated April 3, 2007, that was  
9 addressed to the district's Director of Finance and signed by the Audit Manager. The start  
10 letter identified the Auditor-in-Charge, program being audited, the entrance conference date  
11 and time, and a basic records request. Some of the basic records requested in the audit start  
12 letter included claimant-prepared records already made available, such as copies of claims,  
support for the district's indirect cost rates, and relevant accounting data. The document  
request was made because the auditors want to review all relevant documents, not just those  
submitted with the claim, and ensure that the most recent versions are available.

13 10) The initial final report was issued on April 17, 2009, and reissued on August 25, 2010,  
14 reducing the audit adjustments by \$5,855.

15 11) The protocol related to the audit process described above is consistent with the protocol  
for all audits of mandated cost claims.

16 I declare that the above declarations are made under penalty of perjury and are true and correct  
17 to the best of my knowledge, and that such knowledge is based on personal observation,  
18 information, or belief.

19 Date: February 26, 2015

20 OFFICE OF THE STATE CONTROLLER

21  
22 By: 

23 Jim L. Spano, Chief  
24 Mandated Cost Audits Bureau  
25 Division of Audits  
26 State Controller's Office  
27

**DECLARATION OF SERVICE BY EMAIL**

I, the undersigned, declare as follows:

I am a resident of the County of Sacramento and I am over the age of 18 years, and not a party to the within action. My place of employment is 980 Ninth Street, Suite 300, Sacramento, California 95814.

On March 2, 2015, I served the:

**SCO Comments**

*Collective Bargaining and Collective Bargaining Agreement Disclosure*

09-4425-I-17 and 10-4425-I-18

Government Code Sections 3540-3549.9

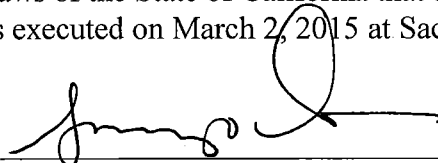
Statutes 1975, Chapter 961; Statutes 1991, Chapter 1213

Fiscal Years 2002-2003 through 2005-2006

Sierra Joint Community College District, Claimant

By making it available on the Commission's website and providing notice of how to locate it to the email addresses provided on the attached mailing list.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that this declaration was executed on March 2, 2015 at Sacramento, California.



Lorenzo Duran  
Commission on State Mandates  
980 Ninth Street, Suite 300  
Sacramento, CA 95814  
(916) 323-3562

# COMMISSION ON STATE MANDATES

## Mailing List

**Last Updated:** 2/3/15

**Claim Number:** 09-4425-I-17 and 10-4425-I-18

**Matter:** Collective Bargaining and Collective Bargaining Agreement Disclosure

**Claimant:** Sierra Joint Community College District

### TO ALL PARTIES, INTERESTED PARTIES, AND INTERESTED PERSONS:

Each commission mailing list is continuously updated as requests are received to include or remove any party or person on the mailing list. A current mailing list is provided with commission correspondence, and a copy of the current mailing list is available upon request at any time. Except as provided otherwise by commission rule, when a party or interested party files any written material with the commission concerning a claim, it shall simultaneously serve a copy of the written material on the parties and interested parties to the claim identified on the mailing list provided by the commission. (Cal. Code Regs., tit. 2, § 1181.3.)

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