



**CSIS** California School Information Services



# Annual Report 2006-07



Chief Executive Officer  
Joel D. Montero

Administrative Agent  
Larry E. Reider  
Office of Kern County  
Superintendent of Schools

# FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM

## **Annual Report 2006-2007**

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CSIS California School Information Services

## Foreword

The Fiscal Crisis and Management Assistance Team (FCMAT) continues to successfully respond to the additional responsibilities assigned to the agency, and continues to perform admirably, whether providing AB 1200 management/technical assistance to the field, managing the expanding operations of the California School Information Services (CSIS) program, providing professional and product development to LEAs, or assisting with fiscal emergencies. FCMAT's work more than returns the state's investment with proactive and preemptive support to the field.

The primary role of FCMAT is to provide management and technical assistance to the state's 1,000 LEAs. In fiscal year 2006-07, the Team

*"FCMAT's work more than returns the state's investment with proactive and preemptive support to the field."*

engaged in 72 district and county office operational reviews. The LEAs that were able to take advantage of FCMAT's low-cost, high-quality assistance during the last year can be found elsewhere in this report. Just as important as conducting management assistance reviews, however, is providing direct, timely technical

assistance to the field. A FCMAT employee provides such services almost every day in response to telephone and e-mail inquiries. In addition, the FCMAT Help Desk is utilized extensively, and questions and responses are archived on the FCMAT web site. LEAs need quick answers or information on a multitude of subjects ranging from associated student body accounting to post-employment benefits, and it is our commitment to respond to these questions within 24 hours that makes this service viable and of value to our colleagues. FCMAT constantly works to develop and provide services that are consistent with the evolving needs of the field.

FCMAT has managed the California School Information Services program since its inception in 1996. SB 1453 gave CSIS the responsibility to assign a unique student identifier to every regular K-12 and charter school student in California. \$31 million was provided in 2006-07 to extend full CSIS program involvement, on a voluntary basis, to each of California's LEAs, including charters. CSIS now maintains the largest known K-12 educational data collection system, with its client LEAs and 6.3 million students, far exceeding the extent of any system in North America. The CDE should soon be able to meet the reporting requirements of the federal No Child Left Behind (NCLB) Act of 2001 via the California Longitudinal Pupil Achievement Data System (CALPADS). FCMAT is proud

Administrative Agent  
Larry E. Reider  
Office of Kern County  
Superintendent of Schools

Chief Executive Officer  
Joel D. Montero

FCMAT  
1300 17th Street – CITY CENTRE  
Bakersfield, CA 93301-4533  
Telephone 661-636-4611  
Fax 661-636-4647  
Web site [www.fcmat.org](http://www.fcmat.org)

Northern California Office  
422 Petaluma Blvd. North, Suite C  
Petaluma, CA 94952  
Telephone 707-775-2850  
Fax 707-775-2854

of the accomplishments of its CSIS program and stands ready to assist the state as it begins to address issues related to data management needs.

Professional and product development continues to be a key element of the FCMAT organization. In the four years of implementing the CBO Mentor program, nearly 100 participants have successfully completed extensive training and many have taken the next logical step along their career path. The CBO Mentor program is a true business official preparation effort and the only one of its kind in the state. California school districts are thus the recipients of better trained and prepared school finance individuals. The Coalition for Adequate School Housing (CASH) and the California Educational Technology Professionals Association (CETPA) have modeled their preparation institutes after the CBO Mentor program.

Traditionally, FCMAT both funds and supports a majority of the professional development that is targeted for business office staff. Whether in partnership with CASBO, School Services of California, CCSESA or the CDE, during this past year FCMAT again increased opportunities for California's business staffs to participate in high quality, low cost training. A chronicle of those professional development programs and activities is included in this report.

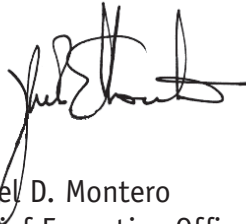
*“In the four years of implementing the CBO Mentor program, nearly 100 participants have successfully completed extensive training and many have taken the next logical step along their career path.”*

Providing new products and publications for LEAs is also an important responsibility of FCMAT. This past year FCMAT updated the County Office Fiscal Procedural Manual, the Fiscal Health Risk Analysis checklist, and the Associated Student Body Accounting Manual & Desk Reference. FCMAT also completed work on our multiyear fiscal forecasting tool, Budget Explorer, and conducted various training workshops on its use and application throughout the year. In association with School Services of California, FCMAT was able to develop and provide at no cost to LEAs this unique web-based, comprehensive tool.

FCMAT has provided assistance in 36 districts where fiscal emergency intervention has been necessary. Work in these districts ranged from assignment as the Fiscal Advisor to the development and updating of comprehensive reviews. This work spans multiple years, making the time commitments and activities difficult to quantify. Unfortunately, there will always continue to be school districts in California that struggle financially. FCMAT aggressively supports county offices of education with their oversight role and implementation of all aspects of AB 1200 and AB 2756. FCMAT updated its AB 1200 Guide with the publication and dissemination in September 2006 of the Fiscal Oversight Guide For AB 1200, AB 2756 and Subsequent Related Legislation. This guide is the state of the art, default desk reference for county offices and school districts regarding the processes, statutory requirements and time lines related to fiscal oversight.

In January 2006, SB 430 (charter schools) and AB 1366 (community colleges) became law, and the impact on FCMAT's workload as a result of these two important pieces of legislation has been significant. The FCMAT organization effectively became K-14 in both its orientation and focus, but the organization has responded well to the new responsibilities. The field has eagerly taken advantage of all of the various aspects of support that the Team can offer.

During 2006-07, the FCMAT organizational chart changed, staff focused on work at the LEA level, the board met and effectively reoriented itself, and the Team evolved. FCMAT has continued as a stable organization with a focused mission to continue to add value to the education industry. The agency has exceedingly competent staff members who are committed to continuous improvement on behalf of school districts and county offices. FCMAT proudly presents this Annual Report which summarizes the activities of the Team during the 2006-07 fiscal year.



Joel D. Montero  
Chief Executive Officer

## FCMAT Organization

In 1992, county offices of education were invited to apply to be the administrative agent for the Fiscal Crisis and Management Assistance Team. Four county offices submitted responses and the Kern County Superintendent of Schools was chosen to be the administrative agent of FCMAT. A 25-member Board of Directors has statutory responsibility for a variety of decisions related to the Team, and is an active, engaged and important component of FCMAT.

## Administrative Agent

The FCMAT Administrative and Fiscal Agent is the Kern County Superintendent of Schools, Dr. Larry E. Reider. Dr. Reider has worked in public education as a teacher and administrator for 40 years. He joined the office of the Kern County Superintendent of Schools in 1984. After holding several positions with the office, including Associate Kern County Superintendent of Schools, he was named Superintendent in 1999 and was elected to full terms in 2002 and 2006. As Kern County's Advocate for Children, Dr. Reider manages an office of more than 1,100 employees and holds positions in state and community organizations. Dr. Reider served as the President of the California County Superintendents Educational Services Association during the 2004-05 year.



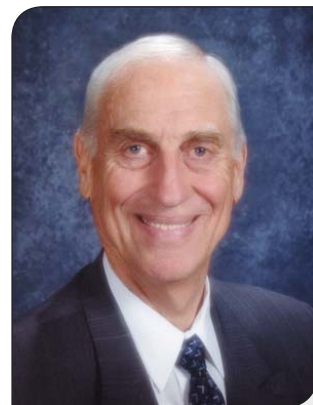
**Larry E. Reider**  
Kern County Superintendent of  
Schools, Administrative Agent

Under the direction of Dr. Reider, Dr. Christine Frazier provides direct supervision of the FCMAT CEO. The role of the administrative agent is to ensure independent fiscal oversight including an independent/external audit of the FCMAT business operations.

## FCMAT Board

Assisting FCMAT is a 25-member Board of Directors, composed of county and district Superintendents representing 11 county office of education service regions, two community college representatives, and an administrator from the Department of Education. The board members are listed on pages 6 and 7 of this report. A Board Chairman is elected by the board to serve a two-year term. The current chair is Dr. Herbert Fischer of the San Bernardino County Office of Education.

Dr. Fischer was first elected as San Bernardino County Superintendent of Schools in 1998 and ran unopposed in the 2002 and 2006 elections for his second and third terms. Before becoming County Superintendent of Schools, he was superintendent of the Colton Joint Unified School District. He has also served as an administrator and teacher in the San Bernardino City Unified School District.



**Herbert R. Fischer**  
Superintendent, San Bernardino  
COE, Chair, Board of Directors

The FCMAT board meets quarterly and the Executive Board meets as needed. In the 2006-07 fiscal year, the FCMAT Board accepted FCMAT's Annual Report for 2005-06, the FCMAT Fiscal Oversight Guide, and the updated COE Fiscal Procedural Manual. The board accepted the reorganization of the agency under the new Chief Executive Officer, the new FCMAT logo and letterhead incorporating CSIS as part of FCMAT, and the 2006-07 budget. It approved the CSIS Data Dictionary and Privacy and Confidentiality document, updated the CSIS strategic plan to include the new practices for CALPADS and CALTIDES, approved FCMAT's professional development calendar, set and distributed the FCMAT daily rates, approved the fourth cohort for the CBO Mentor Project, and recognized five retiring members over the course of the year.

## FCMAT Agency

The Team is headed by a Chief Executive Officer. All FCMAT staff members are employees of the Office of the Kern County Superintendent of Schools. FCMAT also provides oversight of the California School Information Services project, which is based in Sacramento.

In March 2006, the FCMAT board formally appointed Joel Montero as the Chief Executive Officer of FCMAT, replacing outgoing CEO Tom Henry. Mr. Montero's experience spans more than 30 years in the field of education. Beginning in 1975 as a high school teacher, Mr. Montero has been a school principal, deputy superintendent, superintendent of a unified school district, and has worked for the Fiscal Crisis and Management Assistance Team for nine years in a variety of roles and as the Deputy CEO, before his appointment to the position of FCMAT CEO.



**Joel D. Montero**  
Chief Executive Officer, FCMAT

# FCMAT Board of Directors

## County Superintendents

### Paul Tichinin

(Term Expires: 12/31/09)  
North Coast – Region 1  
Supt., Mendocino COE  
2240 Old River Rd., Ukiah, CA 95482  
Phone: 707-467-5001  
FAX: 707-462-0379  
E-mail: ptichinin@mcoe.k12.ca.us

### Bob Owens

(Term Expires: 12/31/07)  
Northeastern – Region 2  
Supt., Lassen COE  
472-013 Johnstonville Road N.  
Susanville, CA 96130  
Phone: 530-257-2197  
FAX: 530-257-2518  
E-mail: rowens@lassencoe.org

### Richard “Ric” Teagarden

(Term Expires: 12/31/09)  
Capitol – Region 3  
Supt., Yuba COE  
935 14th St., Marysville, CA 95901  
Phone: 530-749-4855  
FAX: 530-741-6500  
E-mail: ric.teagarden@yubacoe.k12.ca.us

### Mary Jane Burke

(Term Expires: 12/31/07)  
Bay – Region 4  
Supt., Marin COE  
1111 Las Gallinas Ave., San Rafael, CA 94913  
Phone: 415-499-5801  
FAX: 415-491-6624  
E-mail: mjburke@marin.k12.ca.us

### Tim Foley, Vice Chair

(Term Expires: 12/31/09)  
South Bay – Region 5  
Supt., San Benito COE  
460 Fifth St., Hollister, CA 95023  
Phone: 831-637-5393 x127  
FAX: 831-637-0140  
E-mail: tfoley@sbcoe.k12.ca.us

### Michael Carey

(Term Expires: 12/31/07)  
Delta Sierra - Region 6  
Supt., Amador COE  
217 Rex Ave., Suite 7  
Jackson, CA 95642  
Phone: 209-257-5333  
FAX: 209-257-5360  
E-mail: mcarey@amadorcoe.k12.ca.us

### Larry Powell

(Term Expires: 12/31/09)  
Central Valley – Region 7  
Supt., Fresno COE  
1111 Van Ness, Fresno, CA 93721-2000  
Phone: 559-265-3010  
FAX: 559-237-0733  
E-mail: lpowell@fcoe.k12.ca.us

### Julian Crocker, Past Chair

(Term Expires: 12/31/07)  
Costa Del Sur – Region 8  
Supt., San Luis Obispo COE  
3350 Education Drive  
San Luis Obispo, CA 93405  
Phone: 805-782-7201  
FAX: 805-541-2605  
E-mail: jcrocker@slococoe.org

### William Habermehl

(Term Expires: 12/31/09)  
Southern – Region 9  
Supt., Orange COE  
P.O. Box 9050, Costa Mesa, CA 92628-9050  
Phone: 714-966-4001  
FAX: 714-432-1916  
E-mail: bill\_habermehl@ocde.k12.ca.us

### Herbert Fischer, Chair

(Term Expires: 12/31/07)  
RIMS – Region 10  
Supt., San Bernardino COE  
601 North E St., San Bernardino, CA 92410-3093  
Phone: 909-386-2406  
FAX: 909-386-2941  
E-mail: herbert\_fischer@sbcss.k12.ca.us

### Darline Robles

Los Angeles – Region 11  
Supt., Los Angeles COE  
9300 Imperial Hwy, Downey, CA 90242  
Phone: 562-922-6127  
FAX: 562-922-6678  
E-mail: Robles\_Darline@lacoe.edu

## FCMAT Administration

### Administrative Agent

Larry E. Reider  
Kern County Supt. of Schools  
1300 17th Street  
Bakersfield, CA 93301  
Telephone 661-636-4621  
FAX 661-636-4130  
E-mail: lareider@kern.org

### Chief Executive Officer

Joel D. Montero  
FCMAT  
1300 17th Street  
Bakersfield, CA 93301  
Telephone 661-636-4611  
FAX 661-636-4647  
E-mail: jmontero@fcmat.org

## District Superintendents

### Steve Lund

(Term Expires: 1/1/09)  
North Coast – Region 1  
Supt., Fort Bragg Unified School District  
312 South Lincoln St., Fort Bragg, CA 95437  
Phone: 707-961-2850 x3525  
FAX: 707-964-5002  
E-mail: slund@mcoe.us

### Richard Holmes

(Term Expires: 1/1/08)  
Northeastern – Region 2  
Supt., Siskiyou Union High School District  
624 Everitt Memorial Hwy.  
Mt. Shasta, CA 96067  
Phone: 530-926-3006  
FAX: 530-926-3113  
E-mail: dick@sisnet.ssku.k12.ca.us

### Sherry Smith

(Term Expires 1/1/08)  
Capitol - Region 3  
Supt., El Dorado Union High School District  
4675 Missouri Flat Rd. Placerville, CA 95667  
Phone: 530-622-5081  
FAX: 530-622-5087  
E-mail: ssmith@eduhd.k12.ca.us

### Laura Alvarenga

(Term Expires: 1/1/08)  
Bay – Region 4  
Supt., San Rafael City High School District  
310 Nova Albion Way, San Rafael, CA 94903  
Phone: 415-492-3233  
FAX: 415-492-3245  
E-mail: lalvarenga@srcs.org

### Marc Liebman

(Term Expires: 1/1/08)  
South Bay – Region 5  
Supt., Berryessa Union Elem. School District  
1376 Piedmont Rd., San Jose, CA 95132-2427  
Phone: 408-923-1811  
FAX: 408-923-0623  
E-mail: marc.liebman@berryessa.k12.ca.us

### Bill Draa

(Term Expires: 1/1/09)  
Delta Sierra – Region 6  
Supt., Banta Elementary Sch. Dist.  
22345 S. El Rancho Rd., Tracy, CA 95304  
Phone: 209-835-0171  
FAX: 209-835-0319  
E-mail: wdraa@sjcoe.net

### Dave Miller

(Term Expires: 1/1/09)  
Central Valley - Region 7  
Supt., Hilmar Unified School District  
7807 N. Lander Ave., Hilmar, CA 95324  
Phone: 209- 667-5701  
FAX: 209-667-1721  
E-mail: drmillar@hilmar.k12.ca.us

### Patrick Sayne

(Term Expires: 1/1/10)  
Costa Del Sur – Region 8  
Supt., Paso Robles Unified School District  
PO Box 7010, Paso Robles, CA 93447  
Phone: 805-238-2222 x 212  
FAX: 805-237-3324  
E-mail: psayne@king.prps.k12.ca.us

### Marc Ecker

(Term Expires: 1/1/10)  
Southern – Region 9  
Supt., Fountain Valley School District  
10055 Slater Ave., Fountain Valley, CA 92708  
Phone: 714-843-3255  
FAX: 714-841-0356  
E-mail: eckerm@fvds.k12.ca.us

### Jay Hoffman

(Term Expires: 1/1/09)  
RIMS – Region 10  
Supt., Nuvview Union School District  
29780 Lakeview Ave.  
Nuevo, CA 92567-9261  
Phone: 951-928-0066  
FAX: 951-928-0324  
E-mail: jhoffman@nuvview.k12.ca.us

### Amy Enomoto-Perez

(Term Expires: 1/1/10)  
Los Angeles - Region 11  
Supt., Rosemead Elementary School District  
3907 Rosemead Blvd.  
Rosemead, CA 91770  
Phone: 626-312-2900, ext. 234  
FAX: 626-312-2906  
E-mail: aeperez@rosemead.k12.ca.us

## Community College Representatives

### Frederick Harris

Assistant Vice Chancellor  
California Community Colleges  
1102 Q Street, Fourth Floor  
Sacramento, CA 95814-6511  
Phone: 916-324-9508  
FAX: 925-226-4043  
E-mail: fharris@ccccc.edu

### Don Singer

Board Trustee  
San Bernardino Community College District  
1519 Lynne Court  
Redlands, CA 92373  
Phone: 909-798-2754  
E-mail: dlsinger@verizon.net

## California Department of Education Representative

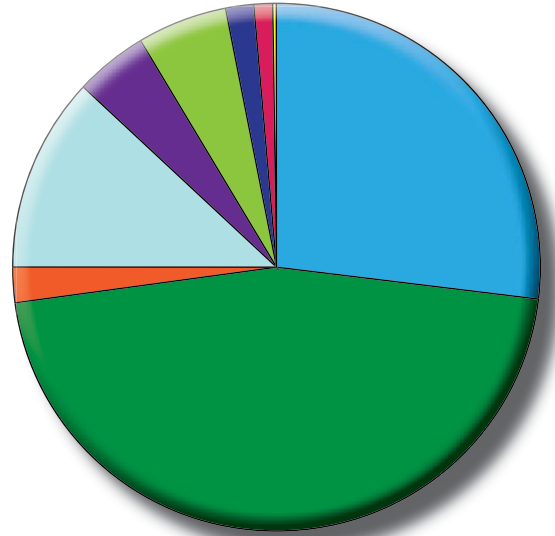
### Susan Lange

Deputy Superintendent  
1430 N Street  
Sacramento, CA 958141  
Phone: 916-319-0815  
FAX: 916-319-0106  
E-mail: slange@cde.ca.gov

# Appropriations for Fiscal Year 2006-07

**\$22,640,000**

- California School Information Services  
\$6,124,000
- CSIS - LEA Projects \$10,360,000\*  
(\$1,360,000 for 2nd year consortium cohort;  
\$9 million for Best Practices) (flow-through)
- CSIS - Student Friendly Services \$500,000  
(flow-through)
- FCMAT AB 1200 \$2,686,000
- COE Reimbursement (flow-through) \$900,000  
for AB 139; 150,000 for AB 1200 oversight
- Professional/Staff Development and Training  
\$1,197,000
- Ed-Data Partnership - CDE, Ed-Source, FCMAT  
\$418,000 (\$376,200 flow-through)
- Regional Teams (AB 2756) \$250,000  
(flow-through)
- Audit Appeals - Educational Audit Appeals  
Panel \$55,000



\*\$29,500,000 was appropriated for Best Practices to be distributed over three years, of which \$9 million was received in 2006-07.

## FCMAT Appropriations

for Fiscal Year 2006-07

FCMAT	(17.58%)	\$3,979,800
CSIS	(27.05%)	6,124,000
Flow-through		
FCMAT	(7.40%)	1,676,200
CSIS	(47.97%)	10,860,000
<b>Total Appropriation</b>		<b>\$22,640,000</b>

# Year in Review

## Partnership with the Educational Community

FCMAT provides proactive and preventative management assistance to districts and county offices that have a forward-thinking approach to managing their operations. Management assistance requests from districts or county offices represent approximately 90% of FCMAT's work. However, the state Legislature and county superintendents of schools may occasionally assign FCMAT into a local educational agency. These assignments are typically for fiscal crisis intervention work and represent approximately 10% of FCMAT's studies. FCMAT's primary charge with these assignments is to avert emergency state loans. Legislation in 2006 made FCMAT services available to charter schools and community colleges, expanding FCMAT's role in providing assistance to local educational agencies, K-14.

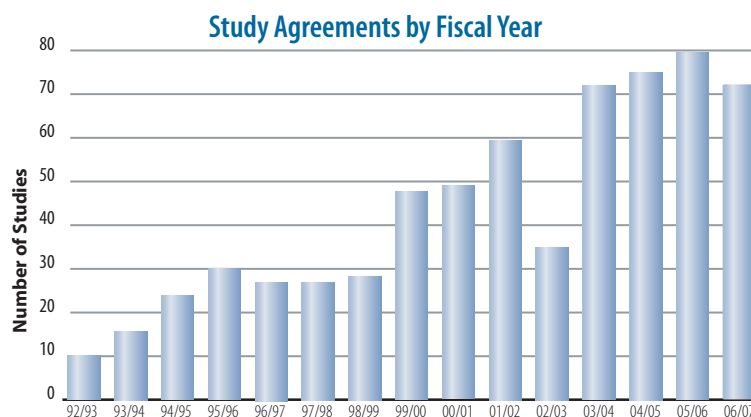
Although the education of students is the primary work of school districts, county offices of education, and other LEAs, it isn't all they must do. Business services, purchasing, technology, facilities, food services, transportation, and personnel are just a few of the functions most local educational agencies must address. These various functions or services all impact the delivery of educational programs and are essential for success. The challenge for districts, county offices and other LEAs is to minimize the cost of these related services to maximize the resources available to support instruction. In 2006-07 and for the next several years, this challenge remains formidable, with districts declining in enrollment and needing to address increasing expenditures with limited resources.

During 2006-07 FCMAT received 72 requests for fiscal crisis intervention or management assistance reviews from districts, county offices, charter schools and community

colleges throughout the state. Of that number, 23 were fiscal/business reviews and two were for fiscal crisis intervention. FCMAT receives a number of requests for reviews of business services, organizational effectiveness,

transportation services, maintenance and operations, and technology—both instructional and administrative. The number of requests in these principal categories and their level of seriousness has continued to increase.

In addition to the requests for fiscal or management assistance from educational agencies each year, FCMAT has been assigned to a number of school districts



that required emergency state loans to continue to operate, and has been required to conduct comprehensive assessments of these districts in five operational areas: Community Relations and Governance, Pupil Achievement, Personnel Management, Financial Management and Facilities Management. FCMAT has developed recommendations and a recovery process to assist these districts in their return to local governance and fiscal solvency, and continues to be engaged with several of these districts in monitoring and reporting on the long-term recovery process. FCMAT has continued to monitor the progress of Compton USD since 1998, Oakland USD since 2003, West Fresno ESD since 2003, Vallejo City USD since 2004, and most recently, Compton Community College District since 2006. Progress reports were issued for Compton USD in August 2006 and February 2007, for Oakland USD in September 2006, for West Fresno ESD in April 2007, and for Vallejo City USD in November 2006 and July 2007. An extraordinary fraud audit was conducted for Compton Community College in November 2006 and a comprehensive assessment conducted for Compton Community College in April 2007.

FCMAT, through AB 1200, AB 2756 and trailer legislation, has been effective in helping oversight agencies and school districts fulfill their fiscal responsibilities. In addition to that role, several monitoring agencies and the state Legislature continue to call on FCMAT as a statewide resource to assist in providing cost-effective services and products to California's public schools.

FCMAT continues to develop and/or update a number of publications and software tools to assist and guide local educational agencies in conducting their operations more effectively, and continues to provide numerous training workshops to assist them in fulfilling their oversight responsibilities.

## Professional and Product Development

FCMAT is charged through EC 42127.8 to provide and facilitate training on fiscal accountability and related topics to members of governing boards, district and county superintendents, school business officials and related staffs, and school site personnel. FCMAT training services emphasize efforts to improve fiscal accountability and the fiscal competency and knowledge of staff through staff development seminars, software development, publications, and teleconferences for the educational community. These services and products are based on FCMAT's fieldwork and collaborative work with state professional associations, private organizations and other public agencies. Whenever possible, FCMAT endeavors to provide professional development support through the 11 county service regions to ensure that county office of education and school district staff develop the technical skills necessary to perform their fiduciary duties.

During the 2006-07 fiscal year, FCMAT Professional Development continued to create and provide opportunities to field professionals at an unprecedented rate. In years when local professional development dollars are less available, FCMAT provides low cost, high quality training in convenient locations to directly benefit business office staff. In cooperation with CASBO, FCMAT again provided, at no charge to the participant, the opportunity to attend Attendance Accounting workshops in several county office locations. Key among the accomplishments of FCMAT in the last year was the continuation of the CBO Mentor training program into its fourth cohort. This unique program nominates aspiring CBOs from school districts and county offices of education, connects them with a professional mentor, and provides, at no cost to the participant, 12 months of high quality training coordinated with field-based experiential practicum. FCMAT partners in the CBO Mentor program include the California County Superintendents Educational Services Association, CASBO, and School Services of California. Approximately two dozen participants graduate from the program each year.

FCMAT publications provide essential information to LEA business professionals at low or no cost. FCMAT updated several of its publications in the last year: the Associated Student Body Accounting Manual; the COE Fiscal Procedural Manual, which includes a compendium of procedures, policies and best practices related to county oversight of district business operations; and the Fiscal Oversight Guide, which includes AB 1200 and AB 2756, and related legislation.

Financial projection software is an important and essential tool for CBOs. In 2006-07, FCMAT's web-based Budget Explorer multiyear projection software was refined and made available in fall 2006 at no charge to all LEAs. The actual program and resulting data related to Budget Explorer is hosted by FCMAT and housed in our CSIS facility in Sacramento. Several training workshops on Budget Explorer were conducted during the year.

With the number of FCMAT Professional Development programs and publications continuing to expand, it has become increasingly difficult to keep the field readily informed about the availability of statewide training opportunities and related information. To address this issue and comply with requirements under AB 3141,

FCMAT has created a web-based Professional Development Guide. The Guide can be accessed via the FCMAT web site at [www.fcmat.org](http://www.fcmat.org) and includes both our internally funded programs and all other training opportunities offered in the state. The Guide is updated constantly throughout the year, thereby providing accurate and up to date information to its users.

FCMAT Professional Development continues to work with our many statewide partners, including the newly assigned Regional Teams in county office service regions 1, 4, 9 and 10. Each of the Regional Team charters expresses a commitment to providing local professional development services, and the current Budget Act allows FCMAT to utilize some organizational dollars to help leverage the team's investment.

As new statutes are implemented and processes and procedures evolve, FCMAT Professional Development can react quickly to those changes and provide new information to inform the field. Providing expedient services on behalf of our many LEA constituents is critical to their ability to perform their jobs efficiently and accurately.

### **Teleconferencing/Web-Based Streaming**

FCMAT and the 58 county offices of education have been in partnership since 1996-97 to bring information to the field via a satellite based teleconferencing process. FCMAT views teleconferencing as a primary channel for the delivery of services and information in an accessible and cost effective manner. In recent years, with the advent of the California High Speed Network and the evolution of computer based digital conversion technologies, FCMAT has offered programming both in the form of a satellite downlink and via a web-based streaming protocol. The web-based streaming format has the advantage of access from the computer desktop allowing any person to view our broadcasts simultaneously. The digital streaming technology also has the added advantage of significantly reducing the cost of production. In May, 2007, FCMAT produced the May Revision teleconference in what will be the final satellite downlink format. All future broadcasts will utilize exclusively the web streaming protocol. FCMAT will continue to sponsor special broadcasts throughout the year focusing on the Governor's May Revise, the Legislative Analyst's Office analysis of the Governor's budget, and additional programs that are shorter in length and more topical.

Throughout the year, the feedback from all constituent groups has been very positive related to the quality and content of the FCMAT broadcasts. The end user should notice little difference in the exclusive conversion to the web streaming format. Reduced production costs may allow for additional broadcasts, in various formats, during the course of the next year. The challenge for the FCMAT teleconferencing project is to continue to provide timely information to the field in a format that is easily accessible and not only informs decision making but adds value for each constituency.

### **Ed-Data Partnership**

The Educational Data Partnership (EDP) web site has a 12-year history of providing valuable data analysis to a variety of constituents in California's

educational community. In the past year, the Ed-Data web site has once again evolved its functionality, content, and user interface. In particular, Ed-Data's financial information is now presented in the Standardized Account Code Structure (SACS) format. This change allows for enhanced analysis and disaggregation of data. The "Find Districts Like Mine" and "Find Schools Like Mine" functions have been updated and now have the ability to consider additional variables as defined by the user. Each week, the EDP working group refines, adds data and considers the functionality of the web site. In this way, the information is continually updated with the latest information that is collected by LEAs and produced by the California Department of Education.

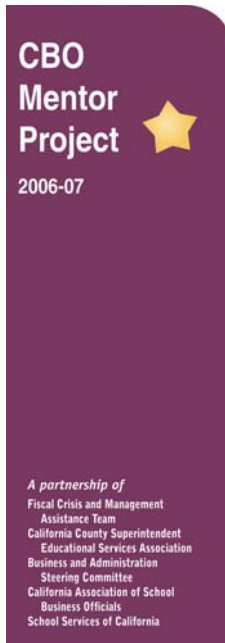
In partnership with FCMAT are CDE, EdSource, an independent organization providing analysis of education data, and the Alameda County Office of Education, providing web site design and maintenance. The Ed-Data Partnership web site, which receives approximately one million visits per month, is found at [www.ed-data.k12.ca.us](http://www.ed-data.k12.ca.us) and is linked on FCMAT's home page, [www.fcmat.org](http://www.fcmat.org). The Ed-Data site contains the most user-friendly and up-to-date data available in the demographic and assessment areas and is the only education web-site that provides financial information in California.

The Ed Data Partnership makes efficient use of the state's investment in data analysis by making school, district, and county information readily available to a variety of users. A primary objective of the Ed-Data web site is to follow the Governor's data transparency initiatives by helping to make information available to all constituencies in a format that is usable and easily understood. The Partnership is pleased that the site is used by legislative staffers, teachers, students, school administrators, board members, CBOs, reporters, parents and researchers.

The challenge in the coming year for the EDP is to once again take the Ed-Data web site to the next level of function and accomplishment and to work cooperatively with the state's other comprehensive data system initiatives. To that end, FCMAT is working with the Partnership to gather an advisory committee composed of LEA representatives, researchers, control agency staff, legislative leaders, and other professional groups. The purpose of the committee is to review the status and function of the current site and make recommendations for changes in content, format and direction. Work of the committee will occur during the 2007-08 fiscal year resulting in a strategic plan for Ed-Data that will be implemented starting in the spring of 2008.

### **CBO Mentor Project**

The CBO Mentor Project is an exemplary one-year program designed to produce qualified school district CBOs. It consists of classroom training taking place in nine one-and-a-half-day sessions. Each session is held on Friday night from 5 pm to 9 pm and all day Saturday at the Hilton Garden Inn in Sacramento. Each participant is assigned a mentor who is an experienced CBO and is available to help the participant as needed. This program is not for entry-level school personnel, but is for those who have a clear goal and experience in school business operations that will enable them to advance their career to the CBO level.



The first cohort of the Mentor Project began in April 2004 and concluded in March 2005; the second cohort began in April 2005 and concluded in March 2006; the third cohort began in April 2006 and concluded in March 2007, and the fourth cohort began in April 2007 and will conclude in March 2008. Planning is under way for the fifth cohort, April 2008 to March 2009, with applications available on FCMAT's Web site beginning September 1, 2007.

The CBO Mentor Project is extensively evaluated to determine its effectiveness, which also prompts necessary changes to the curriculum to reflect the current responsibilities and roles of CBOs in California school districts. Mentors and participants engage in midyear and annual evaluations to give the CBO Mentor Project Steering Committee feedback and advice.

Annual surveys have been conducted to measure the changing roles and job positions of participants who have participated in the CBO Mentor Project. Ninety-eight percent of the candidates who have completed the program have either advanced to higher positions in the business office and/or have become an Assistant Superintendent of Business Services. Seventy-three candidates have completed the program and 27 are being trained in the fourth cohort.

This project is a partnership of the California Association of School Business Officials (CASBO); School Services of California (SSC); the California County Superintendents Educational Services Association (CCSESA) Business and Administration Steering Committee (BASC); and the Fiscal Crisis and Management Assistance Team (FCMAT). FCMAT is underwriting the project and the training is offered free to participants.

## Associated Student Body (ASB) Handbook

FCMAT first developed and published the Associated Student Body Accounting Manual & Desk Reference in 2002. The manual was well received by the educational field and has become the standard used by educational entities throughout the state for ASB operations. The manual was revised in 2005, and another revision was completed and made available for distribution in August 2007. The latest revision includes additional information and new chapters on food laws, allowable fees and community college ASBs. The Frequently Asked Questions chapter has been substantially expanded and the "gift of public funds" information has been updated as it pertains to gifts and awards to students and staff. Many of the revisions and additions are the result of suggestions made by both users in the field and ASB workshop attendees.

The ASB Manual & Desk Reference is designed for use by those involved with student organizations and their managers. Information is provided in a user-friendly format to guide district and school personnel and students who are responsible for student body activities, especially fund-raising. The manual responds to the increased

demands on today's school leaders to augment funding for students and schools while maintaining fiscal accountability and accuracy.

The goal of the manual is to answer questions on many levels concerning ASBs, including accounting, purchasing, student stores, vending machines, food sales, clubs and overall roles and responsibilities. Readers are guided systematically through the major steps to initiate and maintain an effective student body program for elementary, middle, junior and senior high students. The manual focuses on the great range of decision-making authority of student councils, suggests useful tools and procedures, provides practical advice, and indicates legal constraints in certain business areas. Most importantly, the Associated Student Body Accounting Manual & Desk Reference suggests the right questions to ask and how to assess the answers. FCMAT will continue to publish periodic revisions to this manual.

FCMAT also provides numerous workshops for counties and districts on managing ASB funds as an additional aid, partners with CASBO in presenting the information state-wide, and manages a help desk to respond speedily to questions on this and other fiscal subject areas.

## Fiscal Oversight Guide

Since the February 2000 publication of the AB 1200 and Related Responsibilities guide, the state Legislature has enacted important fiscal oversight legislation. In June 2004, the Legislature approved and the Governor signed AB 2756, a major revision and addition to the fiscal oversight practices. FCMAT has updated the AB 1200 Guide (first published in February 2000) to include the increased oversight requirements of AB 2756. The Fiscal Oversight Guide issued in September 2006 reflects the additional requirements and provides an additional resource for county offices to use in the oversight of school districts. The CCSESA subcommittee BASC assisted in reviewing and editing the document.

The document outlines the responsibilities of the county offices of education in the budget adoption and approval process and review of interim reports, and provides guidance and sample letters for various scenarios if budgets are disapproved or interim reports are qualified or negative.



## County Office of Education Fiscal Procedural Manual

The County Office of Education Fiscal Procedural Manual was produced and distributed in 2004-05 to assist COE business officials in performing their required duties related to evaluating the operation of school district finances. The manual outlines 26 procedures and adopted standards that are required by California Education and Government Codes. As requested by the FCMAT Board of Directors,

**Fiscal Procedural Manual**  
FOR BUSINESS OFFICIALS IN CALIFORNIA COUNTY OFFICES OF EDUCATION

Fiscal  
Crisis  
Management  
Assistance  
Team



the manual can assist COEs in developing consistency and common practices when reviewing and responding to school district fiscal requirements. The manual is intended as a guide, not a mandate, and can be used by every COE in California as an external document to assist in the monitoring of activities required by AB 1200 and AB 2756.

The COE Fiscal Procedural Manual was produced by FCMAT and its Administrative Agent, the Kern County Superintendent of Schools. Many people assisted in the creation of the manual. The CCSESA subcommittee BASC performed the final review of the manual. The COE Fiscal Procedural Manual is available for download, free of charge, from the FCMAT web site. Numerous

forms, letters and spreadsheets that are presented in the manual are also available for downloading. As new procedures are developed, FCMAT updates sections of the manual each year with the assistance of the BASC, and forwards hard copies of the changes to each COE to replace the outdated procedures in the binder.

## Budget Explorer

Budget Explorer, FCMAT's web-based multiyear financial forecasting software tool, was launched in April 2005 at the CASBO Annual Conference. SACS-compatible and GASB-aware, Budget Explorer is made available free of charge to authorized K-12 staff. Approximately 450 accounts have been established since the software was launched.

This online resource makes it possible for school districts and county offices to access, create, and edit projections from any computer with an Internet connection. By enabling school district and county office staff to create accurate multiyear forecasts of revenues and expenditures, Budget Explorer leads to more informed decision making and the ability to project the fiscal impact of current decisions. BE has two primary objectives: It must be simple to learn, and it must be user-friendly.

SACS compatibility, what-if modeling capability, and powerful reporting features make BE an excellent tool. Many new features and modules enhance the software's capability and include the following:

- Enrollment projection module
- Revenue limit calculation module
- Salary forecasting module
- Automatic resource balancing module
- Audit logging module

The primary objective of BE is to help districts make more informed budgeting decisions by projecting the fiscal impact of those decisions on future fund balance. Among the other features that make Budget Explorer such a useful tool:

- Budget Explorer can be used to create multiyear projections for inclusion in the adoption budget or for interim reports;

- Users can predict how an increase or decrease in enrollment will impact fund balance;
- What-if analysis can help districts accurately determine how a salary increase or COLA will impact expenditures;
- Sensitivity analysis can be used to determine the impact of a change in a single variable over an entire projection;
- Projection reports can be provided to board members and the community to convey long-term fiscal health;
- The impact of changes in class size ratios on teacher staffing requirements and certificated expenditures can be accurately determined;
- Information can be provided in a very timely manner during negotiation meetings with staff units;
- Fine tuning adjustments in revenue limit income can be made with the RL calculation screen;
- Total contributions to restricted resources can be determined and accurately projected with the unique and simple to use “Contributions Edit” window;
- Users can choose their preferred method of data presentation by selecting to work in either:
  - “Object Code” format, allowing input of revenues and expenditures by object code using the J-200 format (permits detail of up to 4 digits),
  - or
  - “Resource” format, allowing input of revenues and expenditures by Resource and object code using the SACS Resource format.

A unique user account assigned by FCMAT provides the user with access to the BE web site. Accounts are password-protected, ensuring that budget forecasts are safe, confidential, and cannot be accessed by unauthorized users.

### ***County Office of Education; COE Internal Business Services Uses***

Funding for county offices is very different from that of school district offices, and there’s never been a software tool that could handle the unique requirements of the COE funding model. Special enrollment categories specific to county offices receive uniquely calculated funding streams, requiring a software tool that offers the entire range of calculation algorithms necessary to create county office projections. With Budget Explorer, county office internal business services users will soon have access to the county office revenue limit calculation form (Form 0), together with all of the enrollment categories and associated revenue calculations that are unique to county offices. An updated version of Budget Explorer v.3.0 for County Offices is anticipated in fall 2007.

### **Chief Technology Officer (CTO) Mentor Project**

The success of FCMAT’s Chief Business Official (CBO) Mentor Project has provided a model for a similar program to prepare individuals for senior leadership in technology and informational services in K-12 education. The demand for technology-supported teaching and learning continues to grow, while K-12

leadership seeks more effective technologies, software and hardware to complete operational tasks. The need continues to increase at all educational levels for improved data collection and management to more effectively present information for reporting, forecasting and decision-making.

Fiscal year 2006-07 witnessed the launch of the CTO Mentor Project. Partners in the CTO Mentor Project are FCMAT, the California County Superintendents Educational Services Association (CCSESA), and as lead agency, the California Educational Technology Professionals Association (CETPA). Representatives of these agencies serve as the Steering Committee for the project.

The California Department of Education (CDE) is supportive and engaged in the project, providing the keynote address at the launching ceremony as well as expert guest instruction. The inaugural cohort consisted of 22 candidates, each teamed with a personal mentor. Candidates received intensive instruction delivered in eight 12-hour segments packaged into Friday evening and all-day Saturday sessions. Candidates must complete assignments, a final thesis and an oral examination. Instructors and mentors are current CTOs from across California, each with extensive K-12 experience and expertise.

### **Facilities Leadership Academy**

The Coalition for Adequate School Housing (CASH) partnered with FCMAT in 2006-07 to provide the School Facilities Leadership Academy, a 10-month, nine-session professional development program.

The 24 members of the first cohort represented a cross-section of the professional disciplines that help design, build and maintain the facilities serving California's public schools: superintendents, chief business officers, facility directors, planners, and maintenance and operations supervisors from both the public and private sectors.

Each participant was paired with a mentor from the ranks of today's school facilities experts, and attended two-day classes each month in Sacramento interspersed with homework assignments taken from real-world challenges. The curriculum covered, both in theory and practical detail, the entire field of public school facilities: site selection, architectural design, facility financing, program management, maintenance and operations and modernization. The challenges, responsibilities and responses that arise in each of these areas were addressed. The classes were taught by a combination of core academy faculty and guest experts.

## FCMAT Operations

### California School Information System (CSIS)

CSIS maintains the largest known K-12 educational data collection system, with its client LEAs and 6.3 million students, far exceeding the extent of any system in North America. This system is vital in building comprehensive information that offers LEAs direct benefits, in part through improved knowledge of student entry into receiving LEAs. This has resulted in more accurate completion and dropout rates, and has enabled student truancy tracking and remediation. Accurate and timely Statewide Student Identifier (SSID) maintenance also facilitates more efficient and effective records transfer and state reporting functionalities that CSIS provides to LEAs and the California Department of Education (CDE).

SSID services will be provided for the fourth year in 2007-08 to a community of almost 1,300 agencies including charter schools. The California School Information Services (CSIS) program has continued to provide online services and support to each local educational agency (LEA) in maintaining the integrity of the SSIDs, which continue to be the key element in building a comprehensive statewide system based on detailed data. In fall 2007, CSIS will again collect individual data to report California's official enrollment, and will for the first time collect individual data for official graduation and dropout reports.

The state's accountability system and data-informed K-12 education policy decisions will be based on individual level data for years to come. The CDE can begin to meet the reporting requirements of the federal No Child Left Behind (NCLB) Act of 2001 via its forthcoming California Longitudinal Pupil Achievement Data System (CALPADS). The CDE and CSIS continue their close collaboration to address the need that LEAs, the CDE, and policy makers have for better data about educational progress over time. Improved data management practices will contribute to providing insight to local and statewide academic progress.

CSIS first scaled to statewide presence in 2004-05, completing the assignment of SSIDs to more than 6.3 million students who were actively enrolled during that school year. Service techniques are geared to clients' needs, from very large districts with sophisticated systems and organizational structures to very small districts without electronic student records and few human resources. CSIS provides data and file format standards to LEAs and the student information system vendors that support LEA work, and provides Web clients for use by LEAs with small student populations that do not warrant investment in full student systems.

The budget bills for 2006-07 provided an additional \$31 million of local assistance funding to extend full CSIS program involvement, on a voluntary basis, to each of California's LEAs, including charters. In consultation with the CDE, CSIS devised a revised set of deliverables and submitted a plan to extend services to approximately 1,000 remaining LEAs. During fiscal year 2006-07 244 LEAs started work on the "best practices cohort," and together with the 260 LEAs that fully participate in CSIS, they will be poised for fast and efficient

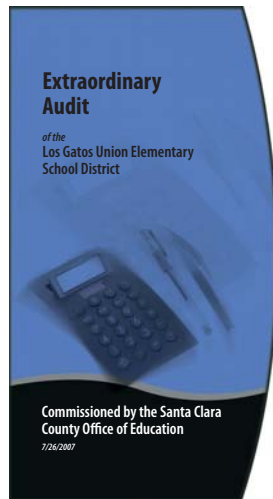
transition to CALPADS. The capability of the remaining LEAs to participate may be best measured by the extent to which local software systems are capable of interfacing with CSIS. Some 90% of all LEAs and 85% of the state's K-12 student enrollment are already served by CSIS-capable student information systems. LEAs that choose to work with CSIS over the next fiscal year will focus on establishing sustainable local practices for collecting, maintaining, reporting and using accurate individual-level data from their CSIS-capable student information systems. The plan was approved by the Department of Finance and the Office of the Secretary for Education in consultation with the Legislative Analyst's Office.

CSIS's engagement in data transfer activities continues to expand within K-12 and from K-12 to California's postsecondary community. 2007-08 will be the third year that student data can be electronically submitted by California high schools to the University of California system for use in the Eligibility in the Local Context (ELC) admission process. Other data transfer activity includes support for data sharing by K-12 and postsecondary participants in the California Partnership for Achieving Student Success (Cal-PASS). Cal-PASS is an initiative that collects, analyzes and shares student data to track performance and improve student success from elementary school through university.

### CSIS Student Friendly Services

CSIS continues to work with California's higher education segments to build postsecondary systems that will receive authorized electronic transcripts for K-12 students via linkage through CSIS. Student Friendly Services through Technology was developed from a concept articulated by the California Education Round Table, representing all of the state's educational segments, to operate an Internet portal ([www.californiacolleges.edu](http://www.californiacolleges.edu)) to California higher education. The project is intended to improve outreach and admission services to prospective higher education students by making the college preadmission and admission processes easier for students, their families and counselors.

### AB 139 Extraordinary Audits



AB 139 added Section 1241.5(b) to the Education Code. This code section provides that the county superintendent of schools may review or audit the expenditures and internal controls of any school district in his or her county if he or she has reason to believe that fraud, misappropriation of funds, or other illegal fiscal practices may have occurred that merit examination.

AB 139, which was codified in Education Code Section 1241.5, continues to be used by the county offices of education. During 2006-07, several extraordinary audits were conducted, some of them involving charter

school and community college operations. AB 139 audits were conducted for Placerville Union School District at the request of the El Dorado County Office of Education, the Los Gatos Elementary School District at the request of the Santa Clara County Office of Education, and the Compton Community College District at the request of the State Trustee. An AB 139 audit was completed for the Albor Charter School, which was requested by the Orange County Office of Education, and initiated during 2005-06. A follow-up of the Options For Youth/ Opportunities For Learning Charter School audit report was also completed, as an addendum to the comprehensive OFY/OFL report that was completed in 2005-06.

### **Fiscal Advisor Assignments**

FCMAT continued to serve as the Fiscal Advisor or Fiscal Expert in several school districts at the request of county offices of education. These assignments included serving as Fiscal Advisor in Trona Joint Unified, Pond Elementary, and Emery Unified school districts, and as Fiscal Expert in Victor Valley Union High School District.

### **Regional Teams**

AB 2756 was enacted by the Legislature and signed by the Governor on June 21, 2004, to strengthen the provisions of AB 1200 by making substantive changes to the financial accountability and oversight process of a school district's financial position. It also established the formation of regional teams to provide fiscal assistance on a local level. In December 2004, the Superintendent of Public Instruction announced the selection of County Office Service Regions 1, 4, 9, and 10 as regionalized service teams to provide training and technical expertise to school districts and county offices of education facing fiscal difficulty.

Each of the four teams is funded on a calendar year basis through an AB 2756 allocation of \$62,500. Fees from services to districts and workshop presentations help supplement the operating costs of the regional teams, in addition to in-kind contributions from their county offices.

With two years of experience now behind them, each of the four teams is concentrating its services in a manner that best responds to the needs of its area school districts. Services and support may include training for new chief business officials and superintendents, conducting management assistance reviews, bringing high quality workshop presentations to remote areas, developing an Attendance Improvement Resource Kit, and offering a CBO/ Superintendent Academy and CBO Forum.

In the past, workshop topics such as GASB 43/45 or School Closure, which were developed as projects within one of the regions, have been presented in the other regional team locations upon request. Recent activities include workshops on Payroll Concepts, Collective Bargaining, Management of Employee Benefits as well as services to districts with new superintendents or CBOs. Because of the high number of declining enrollment districts, discussions are under way to provide CSR Mobility Management and Attendance Strategies workshops.

Requests from districts located within Regional Team areas interested in participating in training opportunities or receiving regional team services may be submitted online or via telephone and e-mail.

## **AB 1200 Reimbursements**

In the event a county superintendent of schools determines that a school district may be unable to meet its financial obligations, the county superintendent may take certain actions as deemed necessary. For example, the superintendent may assign a fiscal expert to advise the district on its financial problems or conduct a study of the financial and budgetary conditions of the district. As provided for in AB 1200, the county superintendent may be reimbursed for a portion of the costs it incurs associated with these actions. Claims for reimbursements are processed through FCMAT and are approved by the Departments of Education and Finance.

## **Education Audit Appeals Panel**

In July 1999, AB 1115 (Strom-Martin) added Education Code Section 41344, which provides an opportunity for a Local Education Agency (LEA) to appeal a finding contained in a final audit report. This code section, with further provisions added in Section 41344.1 in 2002, established an audit appeals panel consisting of the Superintendent of Public Instruction, the Director of the Department of Finance, and the Chief Executive Officer of the Fiscal Crisis and Management Assistance Team, or their designees. Thomas Dithridge (Chairperson) represents the Director of Finance, Joel Montero serves in his capacity as CEO of the Fiscal Crisis and Management Assistance Team, and Susie Lange represents the Superintendent of Public Instruction. The panel usually meets once each month; its meeting schedule and other information may be found on its Web site: [www.eaap.ca.gov](http://www.eaap.ca.gov).

In fiscal year 2006-07 the panel completed action on six formal appeals, adopting two proposed decisions of administrative law judges, approving settlements proposed by the parties in two, and writing its own decision in two. The panel updated the Audit Guide as applicable to 2006-07.

## **Web Page**

Other services provided by FCMAT to the educational community are found on FCMAT's Web site, [www.fcmat.org](http://www.fcmat.org). The site is visited hundreds of thousands of times each year and is continuously updated to remain current. A popular feature is our K-12 News Headlines, a service in which daily education news articles from major news sources are posted. Other online services include a help desk to answer questions about AB 1200 as well as topics ranging from financial to facilities management, from food to transportation services, and from staffing to technology requirements.

## **Help Desk**

The FCMAT Help Desk is an online resource designed to answer questions related to school business throughout California. Questions cover a wide range of school business topics. The use of this resource continues to increase and is clearly an

important tool to our colleagues in the field, increasing from a total of 92 questions and answers in 2004-05, to 180 in 2005-06, and 369 in 2006-07. FCMAT's goal is to answer all questions within 24 hours, and in most cases that goal is reached. All questions receive answers, even if extensive research is required.

The responses provided by the Help Desk are intended to share the expertise of FCMAT staff and are not intended as legal advice. Each answer includes a statement that if the topic involves interpretation of laws, regulation or court precedent or otherwise calls for legal advice, the person asking the question should also consult legal counsel before acting on the FCMAT answer or any other information.

The 369 responses provided in 2006-07 covered the following topic areas:

- Chief Business Official: 61
- Associated Student Body Organizations: 249
- Accounting/Budget: 20
- Technology/CSIS: 4
- Facilities: 10
- Child Nutrition: 3
- Miscellaneous:\* 22

\*In the Miscellaneous category, FCMAT assisted the individual in finding information using another source, such as FCMAT's listserves, EdData, copies of past management assistance reports, and workshop schedules.

## Mailing Lists

FCMAT maintains a confidential mail list for various agencies. These mail lists are a vital, confidential communication link between professional colleagues. FCMAT's statewide, special interest e-mail discussion groups offer district and county office chief business officials (CBOs) and human resources administrators a fast, free and secure method for sharing information. Counties may link their CBOs or human resource administrators on a local or countywide-only basis.

The mailing lists continue to expand and remain an important service that FCMAT provides for the educational community. Currently, FCMAT maintains five active mailing lists for various job-alike groups.

## Job Management System (JMS)

FCMAT's internal operations are managed using Job Management System (JMS) software developed by FCMAT. The JMS software is used by all FCMAT staff and consultants and tracks all current jobs, the professional consultants assigned to each job, the costs incurred by the staff and consultants on each job, and the status of the work completed and reports generated. It provides time line information and due dates, and triggers when a job should be closed and billed to the client. The system is continually modified to include data on the work in progress, and is an invaluable tool to the staff in managing the status of the multiple jobs and contracts being conducted by FCMAT at any given point in time.

## Client Evaluations

FCMAT receives requests for services ranging from fiscal crisis intervention to management consultation and assistance in a wide range of operational areas.

The Kern County Superintendent of Schools, as FCMAT's administrative/fiscal agent, the FCMAT Board of Directors and the FCMAT staff have developed an evaluation process to determine the efficiency and cost effectiveness of the services provided to California's educational agencies. A form to determine the client's satisfaction with the services provided by FCMAT is sent to the client LEA upon the conclusion of FCMAT's work. The results are reviewed, and any client not completely satisfied with FCMAT's services receives follow-up contact from the deputy CEO to determine how FCMAT's services might be improved.

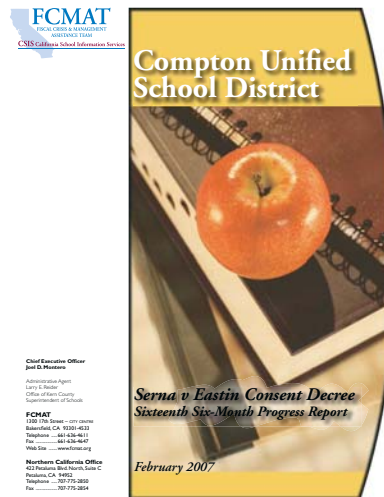
The client evaluation results for 2006-07 are included in the section of this report titled FCMAT Studies.

## Special Study Assignments

### Compton USD – Termination of State Oversight, June 2003

The Compton Unified School District Board of Trustees surrendered its governance powers under the terms and conditions prescribed by the state when the district required two state emergency loans in 1993. Under the provisions of AB 52 (Washington) enacted in 1997, the legislature stated its desire to restore governance powers to the Compton Board of Trustees once the board and the district demonstrated significant improvement in five operational areas: pupil achievement, financial management, facilities management, personnel management, and governance/community relations.

AB52 required FCMAT to conduct a comprehensive assessment and develop a recovery plan in the five designated areas, and to monitor the district's progress in these areas. The assessment and recovery plan was issued on February 1, 1999. FCMAT issued six-month reports on the district's progress in the five designated operational areas in February and August since 1999. Full powers were restored to the governing board by the Superintendent of Public Instruction in December 2001, under a State Trustee. The SPI terminated the oversight of the State Trustee in June 2003 and the district became free of state oversight for the first time in more than ten years.



### FCMAT Responsibility Under Serna v Eastin Consent Decree for Compton USD

FCMAT continues to be involved in the Compton Unified School District as the monitoring agent named in the Serna v. Eastin Consent Decree.

In July 1997, the American Civil Liberties Union and the attorneys for the plaintiffs filed a class action lawsuit against the State Department of Education in the Los Angeles Superior Court. This lawsuit (Serna v Eastin, Case No. BC 174282) claimed that the children attending public schools in the Compton Unified School District were deprived of basic educational opportunities that were available to children elsewhere in California.

The judgment approving the Consent Decree was entered on February 7, 2000. The Consent Decree requires continued improvement in school facilities/sites and the classroom environment. Additionally, the Consent Decree used the FCMAT recovery plan developed for the district under AB 52 and identified specific standards, from among the legal and professional standards developed by FCMAT in the operational areas of pupil achievement and facilities management, that must meet a rating of 8 or better (on a scale of 1 to 10) for the standard to be determined as implemented and sustained.

The Consent Decree places FCMAT in a monitoring role and requires semiannual reports on the district's progress in complying with the requirements of the decree. As six-month progress reports were also a requirement under AB 52, the

six-month progress reports, beginning with the August 2000 report, reflected the progress of recovery under both AB 52 and the Consent Decree. Since FCMAT's monitoring role under AB 52 concluded upon the return of powers to the district governing board in December 2001, FCMAT's six-month progress reports, beginning with the February 2002 report, reflected only the district's progress on those standards and stipulations identified in the Consent Decree.

FCMAT continues to monitor the district's progress under the Consent Decree until the conditions for its termination have been met. The parties to the Consent Decree in 2005-06 agreed to develop alternate criteria for possible earlier disengagement. FCMAT has continued to report in six-month intervals on the district's progress in meeting the alternate criteria for termination of the Consent Decree.

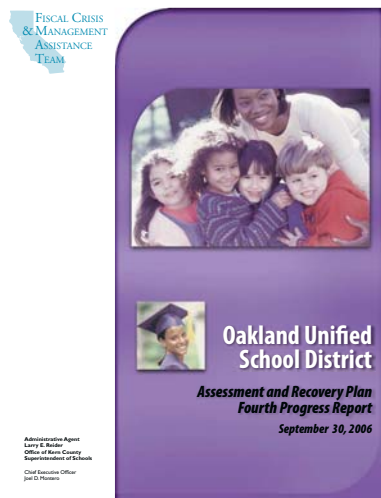
## Emery Unified School District

On October 2, 2000, the Superintendent of Public Instruction and the Alameda County Superintendent of Schools requested the FCMAT board to declare a fiscal emergency at Emery Unified School District. On October 22, 2000 the FCMAT board formally declared under Education Code Section 42127.8(e) that a fiscal emergency existed at the district. In July 2001, AB 96 appropriated a \$1.3 million loan and a \$1 million line of credit to the district, and a State Administrator was appointed.

Full governance powers were restored to the Emery board on July 1, 2004 and a superintendent was hired. The State Administrator became the State Trustee effective July 1, 2004. FCMAT continues as Fiscal Advisor to the district as needed.

## Oakland Unified School District

In April 1999 FCMAT was invited by the Oakland Unified School District Governing Board to develop a comprehensive assessment and recovery plan for the district. The FCMAT Assessment and Recovery Plan for the Oakland Unified School District was completed in January 2000.



In October 2002, the FCMAT Board of Directors declared Oakland USD a fiscal emergency and the Alameda County Superintendent assigned FCMAT as Fiscal Advisor to the district. FCMAT determined that the district would require an emergency loan to continue operations.

In May 2003, Senate Bill 39 authorized a state loan of \$100 million, authorized the Superintendent of Public Instruction to appoint a State Administrator, and assigned FCMAT to update the January 2000 FCMAT Assessment and Recovery Plan for the Oakland USD. The bill further required FCMAT to prepare six-month progress reports through September 2004 on the district's implementation of the

recommendations made in the Recovery Plan. FCMAT's role as the Fiscal Advisor in the district ceased with the appointment of the State Administrator.

FCMAT updated the January 2000 Assessment and Recovery Plan in a report dated September 30, 2003. SB 39 required two six-month progress reports, which were issued in March 2004 and September 2004. As SB 39 required only the two six-month monitoring reports, subsequent legislation was required to authorize FCMAT to conduct subsequent annual progress reports for the district. Reports were issued in September 2005 and September 2006.

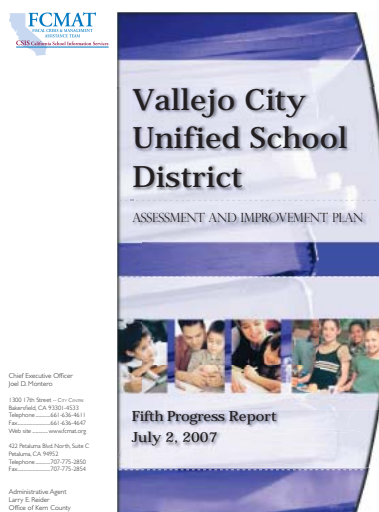
A new State Administrator was appointed in September 2006. In July 2007 the SPI returned one of the five operational areas, community relations/governance, to local governance of the Oakland Board. Much work continues to be required to move the district toward fiscal solvency.

## Vallejo City Unified School District

In June 2004, Senate Bill 1190 authorized a state loan in the amount of \$60 million and authorized the Superintendent of Public Instruction to appoint a State Administrator to the district. FCMAT was required by the legislation to conduct a comprehensive assessment of the district, develop a recovery plan, and provide three six-month monitoring reports of the district's progress through May 2006.

FCMAT issued the comprehensive Assessment and Recovery Plan on November 1, 2004. Six-month progress reports were issued in May 2005, November 2005 and May 2006. Subsequent legislation was required to authorize FCMAT to provide additional progress reports for the district, which were issued in November 2006 and July 2007.

In July 2007 the SPI returned three of the five operational areas to the local governance of the Vallejo Board, with the State Administrator serving as State Trustee for those areas returned to the Board, and as State Administrator for those areas remaining under state administration. The district has made good progress toward regaining its fiscal solvency.

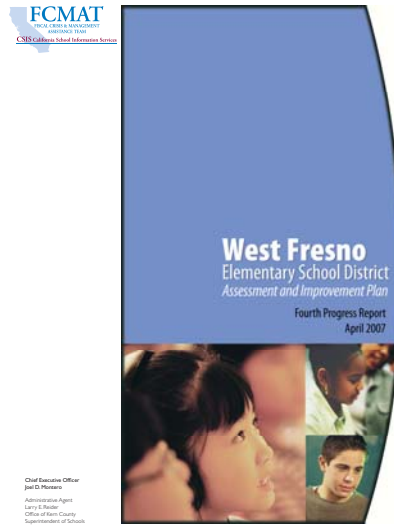


## West Fresno Elementary School District

FCMAT was asked by the Fresno County Superintendent to conduct a review of the West Fresno Elementary School District budget in 2001. In November 2002, the Fresno COE again requested FCMAT's assistance to close the district's books for 2001-02 and develop the district's 2002-03 budget. FCMAT determined that the district was insolvent and required an emergency state loan.

In March 2003, Assembly Bill 38 provided an emergency state loan of \$2 million to the West Fresno Elementary School District and authorized the appointment of a State Administrator. The legislation required FCMAT to conduct a comprehensive assessment of the West Fresno Elementary School District in five major operational areas: community relations, personnel management, pupil achievement, financial management and facilities management. The bill further required FCMAT to file status reports for two six-month periods through June

2004 on the school district's progress in meeting the recommendations of the improvement plans.



FCMAT issued six-month progress reports in January 2004 and July 2004 on the district's progress in implementing the recommendations of the improvement plans. The State Administrator appointed by the SPI in March 2003 retired in June 2005 and the SPI appointed a new State Administrator.

As AB 38 required only two six-month monitoring reports through July 2004, subsequent legislation was required to authorize FCMAT to provide additional progress reports for the district. These progress reports were issued in July 2005 and April 2007. To date, none of the five operational areas has been

recommended for return to the local governance of the district board.

## Compton Community College District

In June 2006, the Compton Community College District required a \$30 million state emergency loan. AB 318 provided the emergency funds and appointed a State Trustee to administer the college district. The district also lost its accreditation in summer 2006, but is able to provide educational programs through its partnership with El Camino Community College as a satellite campus, the El Camino Community College Compton Center.



In summer and fall 2006 FCMAT conducted an extraordinary audit of the college district. The audit report issued in November 2006 called attention to a number of inappropriate operational practices and the lack of internal controls and procedures to guide operations effectively. In addition, FCMAT conducted a comprehensive assessment of the district's operations in the areas of community relations and governance, academic achievement, personnel, facilities, financial and technology management. FCMAT related its legal and professional standards in these areas to the standards of the Accrediting Commission for Community and Junior Colleges to assist

the Compton Community College to not only return to fiscal solvency and local governance, but to also reestablish its accreditation. FCMAT issued its comprehensive report and recovery plan in April 2007, and will continue to monitor the district every six months in January and July until local governance is returned to the district.

## FCMAT Studies 2006-07

### AB 1200 / AB 2756 in Action

Assembly Bill 1200 was created out of the need to ensure that local educational agencies throughout California adequately prepare to meet their financial obligations. The law was based on concerns arising from the bankruptcy of the Richmond School District and the fiscal collapse of other districts that were preparing to seek emergency loans from the state.

Through the passage of AB 1200 in 1991, the Legislature officially notified California's school districts that they should not expect to be saved by the state when they exhibit a pattern of unacceptable fiscal management. The enactment of AB 1200 sent a strong message to local educational agencies to put and keep their finances in order.

AB 1200 is a statewide plan for county offices of education and school districts to work together on the local level to improve fiscal procedures, standards, and accountability. AB 1200 expands the role of county offices of education in monitoring school districts and mandates intervention, under certain circumstances, to ensure that districts can meet their financial obligations. AB 1200 provisions also apply to the state in its role as monitor of county offices of education. Every publicly funded K-12 school operation has been affected by this innovative effort to ensure fiscal solvency throughout school systems in the state.

Those who contributed to the content of AB 1200 recognized the importance of expanding the responsibility and authority of the intermediate agency, the county superintendent of schools office. Additionally, they recognized the need for an independent, external entity. Thus the Legislature, through AB 1200, created the Fiscal Crisis and Management Assistance Team (FCMAT). A statewide resource, FCMAT provides fiscal and management guidance to assist monitoring agencies in the performance of their tasks and assists educational agencies requesting help in school business management and related areas.

The procedures to form FCMAT were spelled out by the provisions of AB 1200. In spring 1992, all county offices of education were notified of the opportunity to apply to be the administrative agent for FCMAT. Four county offices submitted responses. As required by law, the decision of which county office would be selected was made by the Superintendent of Public Instruction and the Secretary of Child Development and Education. The office of Dr. Kelly F. Blanton, Kern County Superintendent of Schools, was chosen to administer FCMAT, and entered into a contract in June 1992 with the governor's office and the California Department of Education. The current Administrative Agent is Kern County Superintendent of Schools Dr. Larry Reider.

The Kern County Superintendent of Schools provides supervision to the team's chief executive officer. Assisting FCMAT in a variety of ways is a 25-member Board of Directors, comprised of county and district superintendents representing the 11 county office of education service regions, a community college representative and a community college board member, and an administrator from the Department of Education. An important function of the

FCMAT board is the authority to declare that a fiscal emergency exists in a local educational agency.

The mission of FCMAT is to help local educational agencies fulfill their financial and management responsibilities by providing fiscal advice, management assistance, training, and other related school business services. To this end, the team provides expedient, professional service to any K-12 local educational agency in a cooperative, non-confrontational manner.

FCMAT's services can be contracted under several different circumstances. For example, if a county office reviews and disapproves a school district's annual budget, that county office may ask FCMAT to examine the district's financial records, develop a budget and/or provide other recommendations to ensure fiscal stability. In addition, FCMAT can respond directly to the request of any school district, county office or charter school seeking advice to improve management.

Two emergency loans to the Oakland Unified School District (2003) and the Vallejo City Unified School District (2004), prompted the state Legislature to author additional fiscal oversight legislation in the form of AB 2756 (Daucher). AB 2756, an urgency measure, took effect upon the signing of the bill by the Governor on June 21, 2004. The bill made substantive changes to the financial accountability and oversight process of a school district's fiscal condition, and clarified the process for the oversight and monitoring of districts that obtain emergency loans.

Various state and local agencies were assigned added responsibilities through AB 2756. The State Board of Education was charged with adopting and updating the state's standards and criteria. It also was required to adopt a comprehensive list of professional and legal standards to be used as a guide for good educational programs and fiscal and management practices. FCMAT's comprehensive assessment and monitoring role with emergency loan districts was clarified and enhanced. The role of the county superintendent of schools was clarified relative to the emergency loan districts. AB 2756 makes it clear that the appointment of a State Administrator to an emergency loan district does not remove any statutory rights, duties, or obligations from the county superintendent. A number of added responsibilities were assigned to local school districts relative to AB 2756. One key change was the requirement for the district superintendent and chief business official to certify in writing that the costs incurred by the school district under a contractual agreement can be met by the district during the term of the agreement.

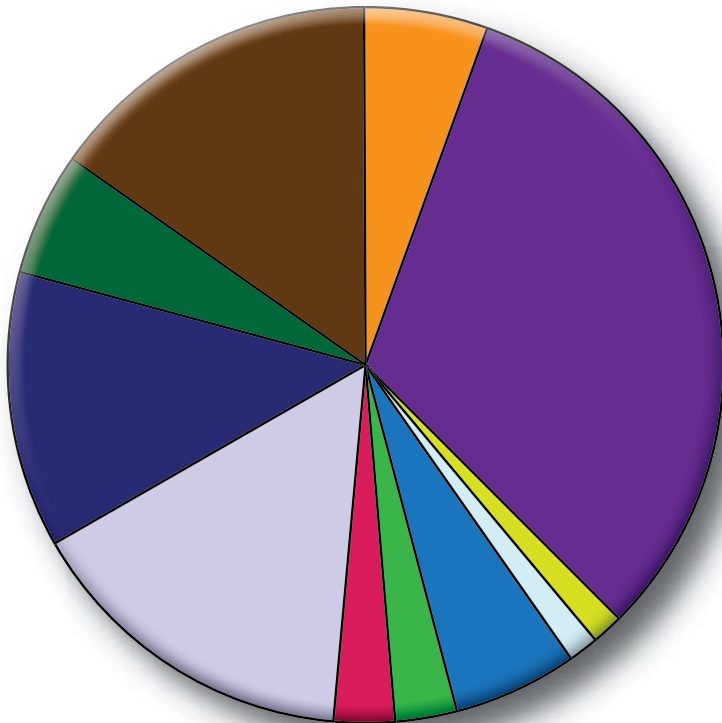
AB 2756 also provided for the development of regional teams to provide training and technical expertise to school districts and county offices of education facing fiscal difficulties. Four regional teams in 2004-05 were awarded funding to assist with the development and deployment of assistance. These four teams were awarded continued funding for 2005-06 and 2006-07.

A summary of the studies completed by FCMAT during the 2006-07 fiscal year is provided on the next several pages.

## Types of Reviews for Fiscal Year 2006-07

### 72 Total Studies

	AB139 Extraordinary Audit:	4
	Business, Fiscal:	23
	Comprehensive	1
	District Reorganization:	1
	Facilities, Maintenance:	4
	Fiscal Crisis/Emergency:	2
	Food Service:	2
	Organization, Staffing:	11
	Technology:	9
	Transportation:	4
	Special Education:	11



## Client Evaluation Results

The Kern County Superintendent of Schools, as FCMAT’s administrative agent, the FCMAT Board of Directors and the FCMAT staff have established an evaluation program to determine the efficiency of the services provided to California’s educational agencies.

Upon completion of each study, the client receives a User Evaluation Form requesting feedback for the services provided and requests that the form be completed and returned to FCMAT. This evaluation assists FCMAT in meeting the needs of the client, as well as documenting areas that may need improvement.

During 2006-07, FCMAT received 48 completed evaluations. An analysis of the evaluations is submitted to the Kern County Superintendent of Schools, as the Administrative Agent and the 25-member FCMAT Board of Directors.

The following is a breakdown of responses from the User Evaluation Forms received during 2006-07.

*1. Did the FCMAT team complete the objective of the study as requested?*

1. Yes	48
2. No	0

*2. Was the time line satisfactory?*

1. Yes	43
2. No	5

*3. Types of Management Assistance Requests*

1. Fiscal Review / Budget Development	10
2. Technology	7
3. Transportation	6
4. Special Education	7
5. Organizational & Staffing	7
6. Maintenance/Operations/Facilities	6
7. Food Services	2
8. Attendance	0
9. Child Development	0
10. Curriculum & Instruction	1
11. AB 139	2
12. Unification	2
13. Reorganization	1

4. *Type of Local Educational Agencies who have completed the User Evaluation Form:*

1. K-12 School Districts	35
2. County Offices of Education	10
3. Community Colleges	2
4. Charter Schools	1

Clients were asked to rate FCMAT's assistance on a scale of 1 to 5, with 1 being of no assistance, 2 slight assistance, 3 average assistance, 4 a great deal of assistance, and 5 excellent assistance.

5. *How would you rank FCMAT's overall assistance?*

5.	34
4.	13
3.	1
2.	0
1.	0

6. *How would you rank your level of satisfaction with the entire process?*

5.	34
4.	12
3.	2
2.	0
1.	0

This client evaluation summary does not reflect the ongoing fieldwork in school districts, nor does it include extensive work performed by FCMAT in response to legislative assignments to conduct comprehensive assessments.

The FCMAT Deputy Executive Officer makes personal contact with all clients who provide a performance evaluation score of 3 or lower. FCMAT maintains written documentation as to the nature of the call, the contact, issues raised and the ultimate resolution.

## Study Summaries

### **Alameda Unified School District (No. 568)**

FCMAT recommended improvements in policies and procedures, communication, and staff development in its special education program. Strategies were also provided for implementing standards to improve services while reducing high NPA/NPS and legal costs.

### **Alameda Unified School District (No. 573)**

The district's technology needs had begun to exceed the technology department's resources. FCMAT provided recommendations and strategies for a new department structure under the educational services division, increased staffing, user support policies and procedures, improved communication, and a technology lead teacher program.

### **Amador County Office of Education (No. 566)**

The study recommended one of two options to allay concerns prompted by the fact that teachers were covered by two separate collective bargaining agreements, one for the county office and one for the district.

### **Anderson Union School District (No. 635)**

A management letter reviewed the district's Associated Student Body (ASB) accounts and internal controls and provided recommendations for improvements.

### **Antioch Unified School District (No. 538)**

An improved technology direction and structure was needed to adequately serve this growing district. FCMAT recommended an updated department structure, policies and procedures, closer communication and coordination with instructional technology services; and improved network security.

### **Banta Elementary School District (No. 610)**

This small district anticipated increasing its enrollment by as many as 6,000 students because of a 5,000-acre development inside its boundaries. Assistance was sought with regard to the fiscal, facilities and staffing challenges that would arise from rapid and substantial growth.

### **Berkeley Unified School District (No. 596)**

Many of the district's practices and processes related to purchasing functions were inefficient and did not adhere to industry standards, according to a FCMAT review.

### **Berkeley Unified School District (No. 631)**

More efficient and cost-effective methods were sought for transporting special education students. FCMAT made a number of specific recommendations in this regard. Speech and language service contracts also were reviewed.

### **Central Unified School District (No. 611)**

The district's technology services were not centralized, contributing to organizational, network and other technical challenges. Recommendations were made to help unify services, improve network infrastructure and implement consistent policies and procedures.

**Clovis Unified School District (No. 628)**

A fiscal analyst position was recommended to assist with the special education program budget. Special education identification rates were much lower than the state average. Better coordination of technology, curriculum and professional development services with the special education program was recommended.

**Colusa County Office of Education (No. 585)**

A review of the county office special education programs resulted in recommendations to assist the county and the SELPA in updating guiding documents, improving communication and collaboration, clarifying roles and procedures and providing additional alternatives for preschool students.

**Compton Community College (comprehensive) (No. 600)**

The initial comprehensive report was completed utilizing both FCMAT and Accrediting Commission of Community and Junior Colleges standards. The conversion of the college to El Camino College Compton Center prompted recommendations to implement processes and procedures to stabilize operations and begin financial and academic recovery.

**Compton Community College District (No. 601)**

FCMAT completed an AB 139 extraordinary audit, finding significant flaws in the district's processes in many areas of operations.

**Compton Unified School District (No. 419)**

FCMAT made various recommendations in the 15th (August 2006) and 16th (February 2007) six-month progress reports pertaining to the functional areas of community relations/governance, personnel management, pupil achievement, facilities management and financial management to address the new criteria in the Consent Decree amendments.

**Corning Union Elementary School District (No. 558)**

Two reports covering staffing, food services and transportation suggested that the district consider merging its Transportation Department with that of the Corning Union High School District and make changes to the current district office organization.

**Davis Joint Unified School District (No. 595)**

A multiyear financial forecast was performed and a thorough review of business office practices and procedures was conducted. Facility/building funds and special education costs were reviewed. A fiscal health risk analysis was completed, with the district's score placing it in the category of high fiscal risk.

**Dos Palos-Oro Loma Joint Unified School District (No. 622)**

A staffing review concluded that the Grounds/Landscaping Department should add two part-time positions and should implement an automated work-order system.

**El Dorado County Office of Education (No. 599)**

FCMAT reviewed district technology and recommended a change of leadership and increased strategic planning and implementation, along with concentrated communications improvement at all operational levels.

**El Monte Union High School District (No. 536)**

The district's transportation program was reviewed and recommendations made to help improve fiscal accountability and efficiency, update the department structure and implement technology solutions to improve tracking and data management.

**Esparto Unified School District (No. 594)**

This small rural district's student transportation operations and staffing were reviewed and recommendations made to improve the efficiency of staffing assignments through combined duty positions. Replacement equipment and the consolidation and/or elimination of some bus routes were also recommended.

**Fallbrook Union Elementary School District (No. 571)**

An analysis of the district's transportation program showed that it was very well run although the department director had too large a span of supervisory responsibilities. The continued use of school bus passes did not appear to be necessary. Full computerization of the vehicle maintenance and bus routing data was recommended.

**Fallbrook Union Elementary School District (No. 587)**

The student transportation routing methodology was reviewed. The practice of shuttling students between "sister schools" was both unusual and expensive, and a review of that practice and its costs was recommended.

**Fresno Unified School District (No. 598)**

Technology, special education, and purchasing/warehouse services were reviewed. The technology infrastructure was in serious need of repair and updating. Special education services were found to be unevenly distributed across the district. Additional training and efficiencies were recommended for purchasing and the warehouse.

**Golden Plains Unified School District (No. 588)**

A budget review and Fiscal Health Risk Analysis found that the district would not meet the 3% required reserve level in the current and two subsequent fiscal years without a detailed plan to reduce expenditures and cease deficit spending.

**Golden Valley Unified School District (No. 553)**

The district's food services department had significant general fund contributions. FCMAT provided strategies to reduce costs and increase revenues through improved technology, changed breakfast service times, and more centralized food preparation.

**Golden Valley Unified School District (No. 581)**

FCMAT reviewed the district's budget, assisted the district in addressing issues with the current budget, and provided ongoing assistance with budget development.

**Golden Valley Unified School District (No. 624)**

This growing district's maintenance and operations/facilities, warehouse and transportation, and purchasing departments were reviewed. An organization and staffing analysis was also provided. FCMAT's recommendations included additional staff and some realignment of duties and assignments to improve efficiency in a number of departments. A facilities plan and a revised master scheduling process were also recommended.

**Hacienda La Puente Unified School District (No. 548)**

Significant declining enrollment had necessitated several million dollars in budget cuts over the past two fiscal years. The use of multiple business software systems presented challenges in reconciling the data. The position control system was not found to be completely reliable. Better communication was recommended with all stakeholders in addressing budgetary issues.

**Heber Elementary School District (No. 623)**

The district's maintenance and operations, facilities and transportation programs were reviewed and recommendations made to increase the efficiency and adequacy of staffing and assignments, update documentation and procedures, and implement more consistent standards and policies.

**Hughson Unified School District (No. 609)**

FCMAT reviewed the district's master schedule and its staffing in several departments. A master schedule plan and procedures were recommended, including the development of optimum sizes for many classes. Many business office positions and duties had changed over time, so a review and update was recommended, along with a position control system and staff cross training. Reduced food service staffing and centralized purchasing were needed to reduce costs, while the MOT department was found to need more lead positions and more consistent procedures.

**Kerman Unified School District (No. 506)**

A transportation review found that the pupil transportation program's encroachment on the general fund was substantially higher than the state average and related to salaries, benefits and supplies.

**Kern County Superintendent of Schools (No. 597)**

A fiscal feasibility study of a potential school district reorganization of the Kernville Union and South Fork Union school districts focused on the fiscal effects of unification.

**Lafayette School District (No. 602)**

FCMAT reviewed the district's administrative organization and staffing, technology department and maintenance and operations services. Strategies were provided to realign some management positions to better delineate roles and meet needs. Updated job descriptions, streamlined procedures and increased cross training of staff were also recommended. Technology recommendations included a more efficient organizational structure, consistent equipment standards and improved network services.

**Las Virgenes Unified School District (No. 608)**

Technology was the focus of a study that analyzed the district's wide-area network, infrastructure and security needs.

**Lucia Mar Unified School District (No. 615)**

A review of the district's special education programs resulted in recommendations to update the department's organizational structure, assume direct control of some programs and services, align job duties, reduce overidentification and take other measures to improve both services to students and cost-effectiveness.

**Menlo Park City Elementary School District (No. 604)**

FCMAT reviewed the feasibility of implementing a home-to-school transportation program and provided the district with an analysis of several possible options for transportation services, including both district-provided and contractor-provided services.

**Nuview Union Elementary School District (No. 576)**

The management review concluded that the proposed unification of three school districts was not fiscally feasible, but it might be feasible for parts of some districts to unify.

**Oakland Unified School District (No. 385)**

The functional areas of community relations/governance, personnel management, pupil achievement, facilities management and financial management were the focus of FCMAT's fourth progress report for the district, issued September 2006.

**Oakley Union Elementary School District (No. 644)**

Although district enrollment had been growing, staffing for the maintenance, operations and grounds functions appeared to need only minor adjustments. Salary comparisons for the job positions in these areas were conducted and the data included in the report.

**Options for Youth/Opportunities for Learning Charter Schools (No. 499)**

Various financial reporting issues existed. Key recommendations included the strengthening of existing conflict-of-interest policies, review and quality control of board minutes and contracts, measures to better ensure the independence of board members, and review of existing management fees for reasonableness.

**Options for Youth/Opportunities for Learning Charter Schools Phase II (No. 636)**

A follow-up audit was conducted to include the financial calculations and pupil-to-teacher ratios for fiscal year 2001-02. A response from the OFY/OFL organizations to the earlier audit, along with the audit team's rebuttal to the response, was included in the report.

**Orange County Department of Education/Albor Charter School (No. 563)**

The charter closed abruptly on or about March 25, 2006, without notice to employees or students. Numerous issues were found with its operations and financial transactions. Most financial transactions were between related parties. Evidence indicated that students may have been charged tuition or fees to attend the school, especially the vocational programs.

**Pomona Unified School District (No. 612)**

A significant decline in enrollment that began in 2003-04 had necessitated approximately \$30 million in cuts to allow the district to maintain a balanced budget. More thorough budget development processes to include all stakeholders were recommended. The position control system needed to be fully integrated with the payroll, personnel and budget modules. A Fiscal Health Risk Analysis placed the district in the low-risk range.

**Poway Unified School District (No. 641)**

The district's fee-based pupil transportation system was found to serve students well, but some services lacked cost efficiency or might not be essential. Recommendations were made to help reduce costs and improve operational efficiency while maintaining an appropriate level of service.

**Sacramento City Unified School District (No. 574)**

A fiscal review focused on budgeting practices and included an analysis of the district's 2005-06 budget assumptions and projections to help the district maintain its required 2% reserve at year end.

**Sacramento County Office of Education (No. 618)**

A special education review suggested that the Sacramento County Special Education Local Plan Area (SELPA) take several measures to prepare for the possibility that the Folsom-Cordova Unified School District would leave that entity to form its own SELPA.

**San Benito High School District (No. 580)**

Recommendations to improve the district's technology services included regular equipment replacement, implementation of acceptable usage and technology support policies, a strict password policy, reconfiguration of computer labs, and a new five-year strategic technology plan.

**San Bernardino COE/Bear Valley USD/CEE Charter (No. 449)**

The charter began operating in mid-2002 and its charter was revoked by the district on September 1, 2004, because of numerous operational and compliance issues. FCMAT conducted a 100% audit of student attendance and disallowed approximately 59% of the ADA claimed. Irregular hiring practices and apparent duplicity in accounting practices also were found. The charter did not follow good business practices.

**San Bernardino County Superintendent of Schools / Victor Valley Union High School District (No. 577)**

The district requested a budget analysis to help determine the impact of a proposed salary increase. FCMAT performed a preliminary fiscal analysis, at which time the district requested a further study to include a multiyear financial projection.

**San Diego County Office of Education (No. 505)**

The district's existing administrative technology systems, information processing needs and technology organizational structures were the focus of a FCMAT study.

**San Mateo-Foster City School District (No. 560)**

Technology was the subject of a review that recommended the district take appropriate measures to secure its wireless networks.

**San Mateo Union High School District (No. 630)**

A report that included a multiyear financial projection concluded that unless preventative measures were taken, the district would not meet its 3% reserve requirement in the 2006-07 and 2007-08 fiscal years.

**Santa Clara County Office of Education (No. 621)**

A special education review of Bullis Charter School found that most of the charter's special education reimbursement claims for the 2005-2006 fiscal year were not valid under state and federal laws and regulations related to special education.

**Santa Monica-Malibu Unified School District (No. 614)**

A financial review and multiyear projection indicated that the district could meet its obligations and maintain its required reserve in the current and two subsequent years through careful financial management, but that fiscal solvency in years beyond the projection would likely require additional measures.

**Simi Valley Unified School District (No. 589)**

Development of an Internet protocol-only environment and an upgrade to the latest Novell operating system were among the suggestions made by FCMAT in this technology study.

**Simi Valley Unified School District (No. 590)**

The review identified the procedural and fiscal impacts to all staff of changing to a drop shipment ordering and delivery process for school site and department materials and supplies.

**Siskiyou County Office of Education (No. 605)**

Special education programs and services were reviewed and recommendations provided to improve communication and organization to increase efficiency of services and programs. FCMAT also made recommendations to assist the SELPA in achieving a more equitable distribution of funding.

**South San Francisco Unified School District (No. 603)**

The district's food service and warehouse operations were reviewed. Recommendations were made to streamline food service staffing and operations while increasing revenue to reduce general fund contributions. The warehouse's interior design hampered efficiency and needed remodeling. Standard delivery procedures and schedules were suggested for this department.

**Temple City Unified School District (No. 578)**

FCMAT reviewed the district's business office staffing and operations, compared it with similar districts, and recommended updated job descriptions, improved data entry and clerical efficiency, and implementation of an integrated position control system.

**Temple City Unified School District (No. 613)**

FCMAT reviewed the Personnel Department and suggested the district add a partial or full-time clerical support position as well as initiate cross-training between department positions.

**Trona Joint Unified School District (No. 583)**

Steady enrollment decline and diminishing royalty payments from a local business had forced the district to make substantial budgetary cuts. FCMAT helped to identify possible future staff reductions should enrollment continue to decline. Curricular issues and special education services also were reviewed.

**Vallecito Union School District (No. 625)**

The district had entered basic aid status and was in contract negotiations, prompting a request for a fiscal review. FCMAT provided a management letter and board presentation with a thorough analysis of basic aid funding and issues. FCMAT confirmed the district's calculations and provided recommendations for improved communication, contingency agreements with bargaining units and other procedures to ensure continued fiscal solvency.

**Victor Valley Union High School District (No. 570)**

The district's Centralized Enrollment Center and technological systems were reviewed. Better procedures were needed to ensure the timely delivery of student enrollment information to the sites. Realignment of technology staff was recommended. Additional technology-related training was suggested for site administrators and teaching staff.

**Victor Valley Union High School District (No. 606)**

A fiscal analysis was provided to help the district determine the feasibility of proposed salary increases. Recommendations were made to help ensure fiscal solvency and to improve position control, staffing assignments and scheduling.

**Victor Valley Union High School District (No. 617)**

The district faced multiple challenges compounded by tense contract negotiations. FCMAT's report provided strategies for implementing systems, policies and standard procedures in the areas of master scheduling, staffing, categorical funding and programs. Communication, leadership and staff morale issues were also addressed and strategies provided to assist the district in implementing effective change and reforms.

**West Valley – Mission Community College District (No. 593)**

The district lacked budget tracking and projection, and there was little standardization of financial procedures. A fiscal review and multiyear financial projection resulted in recommendations to help clarify board and administrative roles, standardize procedures, and strengthen budget updating, development, and forecasting.

**Woodland Joint Unified School District (No. 616)**

Maintenance and operations, purchasing, food and technology services were reviewed. Hiring a purchasing director and centralization of purchasing contracts and risk management were recommended. The maintenance and operations department appeared understaffed, and newly purchased work order software needed implementation. Food Services needed to further automate its data handling and consider moving breakfast service later in the morning to increase participation. The technology department lacked clear leadership and needed additional desktop support staff and an equipment replacement plan.

# Appendices

- A. FCMAT Study Chronology**
- B. FCMAT Professional Development Projects and Products, 2005-06**
- C. FCMAT Governing Board Meeting Minutes for 2005-06**



## Appendix A

# FCMAT Study Chronology

## Number and Type of Studies Annual Comparison

Type of Study	Number of Studies by Fiscal Year															
	92/93	93/94	94/95	95/96	96/97	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06	06/07	Total
Fiscal Crisis/Emergency	6	3	4	3	2	1	1	2	2	4	2	1	1	1	2	33
Management Assistance																
Comprehensive	0	0	0	0	0	0	0	0	0	2	2	5	0	0	1	9
Business, Fiscal	2	9	7	8	12	7	9	10	14	15	11	20	31	31	23	186
Transportation	0	2	6	4	5	4	7	5	7	11	6	6	9	6	4	78
Attendance	1	0	0	1	0	1	1	0	0	1	0	0	2	2	0	9
Technology	1	1	1	1	1	3	4	11	10	10	9	9	11	16	9	88
Organization, Staffing	0	1	3	0	4	7	3	8	7	4	4	14	7	7	11	69
Special Education, SELPA	0	0	0	2	1	0	1	2	1	3	1	2	3	7	11	23
Food Service	0	0	0	1	0	2	1	0	2	1	0	5	0	4	2	16
Facilities, Maintenance	0	0	0	0	1	0	1	5	3	4	0	4	4	2	4	2
Alternative Education, ROP	0	0	0	1	0	0	1	0	0	0	0	0	0	0	0	2
External Evaluator	0	0	0	0	0	0	0	2	2	0	0	0	0	0	0	4
District Reorganization	0	0	2	3	1	2	0	0	0	0	0	0	0	0	1	8
Other Services or Training	0	0	0	6	0	0	0	3	1	1	0	3	1	0	0	15
AB139 Extraordinary Audits	0	0	0	0	0	0	0	0	0	4	0	3	7	2	4	16
<b>Total Studies</b>	<b>10</b>	<b>16</b>	<b>23</b>	<b>30</b>	<b>27</b>	<b>27</b>	<b>29</b>	<b>48</b>	<b>49</b>	<b>60</b>	<b>35</b>	<b>72</b>	<b>76</b>	<b>79</b>	<b>72</b>	<b>653</b>

### Ongoing reports monitoring the progress of districts assigned a comprehensive review by the Legislature:

	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06	06/07	Total
Berkeley Unified SD	0	0	0	0	1	1	1	1	0	4
Compton Unified SD	0	2	2	2	2	2	2	2	2	16
Oakland Unified SD	0	0	0	0	0	2	1	1	1	5
Vallejo City USD	0	0	0	0	0	0	1	2	1	4
W. Contra Costa USD	0	0	0	1	2	1	0	0	0	4
West Fresno ESD	0	0	0	0	0	1	1	1	1	4
<b>Total</b>	<b>0</b>	<b>2</b>	<b>2</b>	<b>3</b>	<b>5</b>	<b>7</b>	<b>6</b>	<b>7</b>	<b>5</b>	<b>37</b>

Study No.	Education Agency	Study Type	Study Topics	Assigned/Invited by	Date Study Requested	Final Report Issued
655	Enterprise Elementary School District	M.A.	Maint & Oper/Facilities	Invited by District	May 22, 2007	Ongoing
654	Contra Costa County Office of Education	M.A.	Purch./Warehouse/Tech.	Invited by COE	May 14, 2007	Ongoing
653	San Lorenzo Valley Unified School District	M.A.	Budget Development	Invited by District	June 4, 2007	Ongoing
652	Emery Unified School District	M.A.	Facilities	Invited by District	May 30, 2007	Ongoing
651	Oakland Unified School District	M.A.	Special Education	Invited by District	March 26, 2007	Ongoing
650	Hamilton Elementary School District	M.A.	Budget Development	Invited by District	April 26, 2007	Ongoing
649	Fresno County Office of Education	M.A.	Special Education	Invited by COE	March 27, 2007	Ongoing
648	Rowland Unified School District	M.A.	Technology	Invited by District	January 8, 2007	Ongoing
647	Livermore Valley Charter School	M.A.	Fiscal Review	Invited by Charter, SBE	April 5, 2007	Ongoing
646	Ocean View School District	M.A.	Technology	Invited by District	March 14, 2007	Ongoing
645	Atascadero Unified School District	M.A.	Maint/Oper/Facilities	Invited by District	November 21, 2006	Ongoing
644	Oakley Union Elementary School District	M.A.	Org & Staffing	Invited by District	December 13, 2006	June 4, 2007
643	Evergreen School District	M.A.	Special Education	Invited by District	March 3, 2007	Ongoing
642	Cotati Rohnert Park Unified School District	M.A.	Fiscal Review	Invited by District	March 12, 2007	Ongoing
641	Poway Unified School District	M.A.	Transportation	Invited by District	March 5, 2007	May 23, 2007
640	Glendale Community College District	M.A.	Fiscal Review	Invited by District	March 12, 2007	Ongoing
639	El Dorado COE/Placerville USD	AB 139	Extraordinary Audit	Invited by COE	March 27, 2007	Ongoing
638	Kern Co. Supt. of Schools/Pond Union School District	M.A.	Fiscal Advisory	Invited by COE	March 29, 2007	Ongoing
637	Black Oak Mine Unified School District	M.A.	Fiscal Review	Invited by District	March 5, 2007	Ongoing
636	Options for Youth/Opp for Learning Charter Schools	AB 139	Extraordinary Audit II	Invited by SPI/COEs	January 29, 2007	April 11, 2007
635	Anderson Union High School District	M.A.	Fiscal Review	Invited by District	January 24, 2007	April 12, 2007
634	Amador County Office of Education	M.A.	Fiscal Review	Invited by District	March 6, 2007	April 11, 2007
633	Scotts Valley Unified School District	M.A.	Special Ed/Transp.	Invited by District	December 7, 2006	Ongoing
632	San Ysidro School District	M.A.	Technology	Invited by District	January 15, 2007	Ongoing
631	Berkeley Unified School District	M.A.	Special Ed/Transp.	Invited by District	February 6, 2007	June 7, 2007
630	San Mateo COE/San Mateo Union High School District	M.A.	Fiscal Review	Invited by COE	February 15, 2007	Ongoing
629	Santa Clara COE/Los Gatos Union School District	AB 139	Extraordinary Audit	Invited by COE	December 4, 2006	Ongoing
628	Clovis Unified School District	M.A.	Special Education	Invited by District	December 1, 2006	June 13, 2007
627	Perris Union High School District	M.A.	Technology	Invited by District	December 14, 2006	Ongoing
626	Victor Valley Union High School District	M.A.	Org. & Staffing	Invited by District	December 18, 2006	Ongoing
625	Vallecito Union Elementary School District	M.A.	Fiscal Review	Invited by District	January 18, 2006	February 22, 2007
624	Golden Valley Unified School District	M.A.	Maint./Fac./Org&Staff/ Warehouse	Invited by District	December 12, 2006	April 18, 2007
623	Heber Elementary School District	M.A.	Maint & Operations	Invited by District	January 9, 2007	May 7, 2007
622	Dos Palos-Oro Loma Unified School District	M.A.	Maint./Facilities	Invited by District	November 27, 2006	April 30, 2007
621	Santa Clara COE/Bullis Charter School	M.A.	Special Education	Invited by COE	December 4, 2006	June 1, 2007
620	New West Charter School	F.C.	Fiscal Crisis	Invited by Charter	October 3, 2006	Ongoing
619	Alpine County Unified School District	M.A.	Fiscal Review	Invited by COE	November 20, 2006	February 26, 2007
618	Sacramento County Office of Education	M.A.	Special Education	Invited by COE	November 7, 2006	May 4, 2007
617	Victor Valley Union High School District	M.A.	Curriculum & Instruction	Invited by District	November 27, 2006	March 6, 2007
616	Woodland Jt. Unified School District	M.A.	Food Svc/Purch/Warehouse	Invited by District	October 25, 2006	April 18, 2007
615	Lucia Mar Unified School District	M.A.	Special Education	Invited by District	September 26, 2006	March 16, 2007
614	Santa Monica Malibu Unified School District	M.A.	Fiscal Crisis	Invited by District	November 5, 2006	February 8, 2007
613	Temple City Unified School District	M.A.	Human Resources	Invited by District	October 5, 2006	April 2, 2007
612	Pomona Unified School District	M.A.	Fiscal Review	Invited by District	September 14, 2006	March 13, 2007
611	Central Unified School District	M.A.	Technology	Invited by District	August 25, 2006	March 20, 2007
610	Banta Elementary School District	M.A.	Org. & Staffing	Invited by District	September 8, 2006	March 6, 2007
609	Hughson Unified School District	M.A.	Org. & Staffing	Invited by District	September 6, 2006	March 1, 2007
608	Las Virgenes Unified School District	M.A.	Technology	Invited by District	September 1, 2006	March 26, 2007
607	Twin Ridges Elementary School District	M.A.	Fiscal Review	Invited by District	August 30, 2006	June 12, 2007
606	Victor Valley Union High School District	M.A.	Fiscal Review	Invited by District	September 19, 2006	Ongoing
605	Siskiyou County Office of Education	M.A.	Special Education	Invited by COE	August 15, 2006	January 10, 2007

Study No.	Education Agency	Study Type	Study Topics	Assigned/Invited by	Date Study Requested	Final Report Issued
604	Menlo Park City Elementary School District	M.A.	Transportation	Invited by District	July 25, 2006	December 15, 2006
603	South San Francisco Unified School District	M.A.	Food Svc/Purch/Warehouse	Invited by District	June 23, 2006	December 20, 2006
602	Lafayette School District	M.A.	Org. & Staffing	Invited by District	July 17, 2006	January 5, 2007
601	Compton Community College District	AB 139	Extraordinary Audit	Assigned by AB 318	July 1, 2006	November 2006 March 12, 2007
600	Compton Community College District	M.A.	Comprehensive	Assigned by AB 318	July 1, 2006	April 18, 2007
599	El Dorado County Office of Education	M.A.	Technology	Invited by COE	June 19, 2006	January 12, 2007
598	Fresno Unified School District	M.A.	Purch/Sp. Ed/Tech	Invited by District	May 26, 2006	Jan. 19, 2007 (Sp Ed) Jan. 19, 2007 (Tech) Jan. 23, 2007 (P&W)
597	Kern County Supt. of Schools	M.A.	Reorganization	Invited by COE	May 17, 2006	December 5, 2006
596	Berkeley Unified School District	M.A.	Purchasing & Warehouse	Invited by District	June 28, 2006	November 8, 2006
595	Davis Jt. Unified School District	M.A.	Fiscal Review	Invited by District	July 7, 2006	December 14, 2006
594	Esparto Unified School District	M.A.	Transportation	Invited by District	July 11, 2006	November 16, 2006
593	West Valley-Mission Comm. College	M.A.	Budget Development	Invited by District	June 23, 2006	November 22, 2006
592	Lassen Community College	M.A.	Fiscal Review	Invited by District	July 1, 2006	March 31, 2007
591	Santa Ana Unified School District	M.A.	Fiscal Review	Invited by District	July 1, 2006	Ongoing
590	Simi Valley Unified School District	M.A.	Org. & Staffing	Invited by District	May 15, 2006	September 21, 2006
589	Simi Valley Unified School District	M.A.	Technology	Invited by District	February 8, 2006	January 5, 2007
588	Golden Plains Unified School District	M.A.	Multiyear Forecast	Invited by District	June 13, 2006	January 31, 2007
587	Fallbrook School District	M.A.	Transportation	Invited by District	May 31, 2006	January 25, 2007
586	West Fresno Elementary School District	M.A.	Fiscal Review/HR	Invited by District	July 7, 2006	March 28, 2007
585	Colusa County Office of Education	M.A.	Special Education	Invited by COE	May 24, 2006	January 9, 2007
584	Novato Unified School District	M.A.	Technology	Invited by District	June 13, 2006	February 28, 2007 (services only)
583	Trona Joint Unified School District	M.A.	Fiscal Review	Invited by District	March 23, 2006	April 20, 2007 (services only)
582	Orchard Elementary School District	M.A.	Fiscal Review	Invited by District	June 15, 2006	April 30, 2007 (services only)
581	Golden Valley Unified School District	M.A.	Budget Development	Invited by District	June 22, 2006	Ongoing
580	San Benito High School District	M.A.	Technology	Invited by District	March 6, 2006	Ongoing
579	Cypress Grove Charter High School	M.A.	Organizational & Staffing	Invited by District	May 30, 2006	June 26, 2006
578	Temple City Unified School District	M.A.	Organizational & Staffing	Invited by District	May 30, 2006	Ongoing
577	San Bernardino Co. Supt of Schools/Victor Valley USD	M.A.	Fiscal Expert	Invited by COE	June 7, 2006	Ongoing
576	Nuvview Union Elementary School District	M.A.	Reorganization	Invited by District	March 17, 2006	Ongoing
575	Monterey COE/Chualar Union School District	M.A.	Fiscal Review	Invited by COE	April 12, 2006	June 6, 2006
574	Sacramento City Unified School District	M.A.	Fiscal Review	Invited by District	March 20, 2006	Ongoing
573	Alameda Unified School District	M.A.	Technology	Invited by District	April 13, 2006	Ongoing
572	San Joaquin COE/Stockton Unified School District	M.A.	Fiscal Review	Invited by COE	April 19, 2006	June 29, 2006
571	Fallbrook School District	M.A.	Transportation	Invited by District	April 19, 2006	Ongoing
570	Victor Valley Union High School District	M.A.	Organizational & Staffing	Invited by District	March 20, 2006	Ongoing
569	Compton Community College District	M.A.	Budget Development	Invited by District	April 2, 2006	Ongoing
568	Alameda Unified School District	M.A.	Special Education	Invited by District	February 7, 2006	Ongoing
567	Valley Center-Pauma Unified School District	M.A.	Fiscal Review	Invited by District	March 9, 2006	June 2, 2006
566	Amador County Office of Education	M.A.	Special Education	Invited by COE	March 6, 2006	Ongoing
565	Hartnell Community College	M.A.	Fiscal Review	Invited by District	January 20, 2006	May 24, 2006
564	Placer COE/Newcastle Charter School	M.A.	Attendance	Invited by COE	March 27, 2006	June 30, 2006
563	Orange CDE/Albor Charter School	AB 139	Extraordinary Audit	Invited by COE	January 11, 2006	Ongoing
562	Merced City School District	M.A.	Fiscal Review	Invited by District	February 8, 2006	June 14, 2006
561	Ramona City Unified School District	M.A.	Fiscal Review	Invited by District	March 8, 2006	June 22, 2006
560	San Mateo-Foster City School District	M.A.	Technology	Invited by District	February 3, 2006	Ongoing

Study No.	Education Agency	Study Type	Study Topics	Assigned/Invited by	Date Study Requested	Final Report Issued
559	Golden Valley Unified School District	M.A.	Budget Development	Invited by District	March 14, 2006	June 8, 2006 (services only)
558	Corning Union Elementary School District	M.A.	Org/Staffing /Transp.	Invited by District	February 2, 2006	Ongoing
557	Pacific Grove Unified School District	M.A.	Food Services	Invited by District	January 30, 2006	June 6, 2006
556	Berkeley Unified School District	M.A.	Attendance	Invited by District	March 2, 2006	May 25, 2006
555	Tehama COE/ Sacramento River Discovery Charter School	M.A.	Fiscal Review	Invited by District	February 6, 2006	April 7, 2006
554	Lassen Community College	M.A.	Fiscal Review	Invited by District	January 18, 2006	Ongoing
553	Golden Valley Unified School District	M.A.	Food Services	Invited by District	January 30, 2006	July 7, 2006
552	Travis Unified School District	M.A.	Budget Development	Invited by District	January 12, 2006	May 15, 2006
551	Mendocino Unified School District	M.A.	Fiscal Review	Invited by District	January 10, 2006	June 2, 2006
550	King City School Districts	M.A.	Fiscal Review	Invited by District	January 18, 2006	May 30, 2006
549	West Fresno Elementary School District	M.A.	Transportation	Invited by District	January 17, 2006	April 11, 2006
548	Hacienda La Puente Unified School District	M.A.	Budget Development	Invited by District	January 10, 2006	Ongoing
547	Siskiyou COE/Willow Creek Elem. School District	M.A.	Fiscal Review	Invited by COE	January 5, 2006	March 23, 2006
546	Jefferson School District	M.A.	Fiscal Review	Invited by District	January 11, 2006	June 19, 2006
545	Contra Costa/West Contra Costa Unified SD	AB 139	Extraordinary Audit	Invited by COE	December 8, 2005	June 20, 2006
544	Yreka Union Elementary School District	M.A.	Food Services	Invited by District	January 10, 2005	March 28, 2006
543	San Mateo-Foster City School District	M.A.	Technology	Invited by District	November 3, 2005	April 25, 2006
542	Alum Rock Union Elementary School District	M.A.	Fiscal Review	Invited by District	November 1, 2005	April 6, 2006
541	Centralia School District	M.A.	Special Education	Invited by District	November 1, 2005	June 8, 2006
540	Alameda Unified School District	M.A.	Fiscal Review	Invited by District	October 31, 2005	March 29, 2006
539	Buena Park School District	M.A.	Technology	Invited by District	September 21, 2005	April 27, 2006
538	Antioch Unified School District	M.A.	Technology	Invited by District	May 18, 2005	July 27, 2006
537	Thermalito Union School District	M.A.	Maint/Facilities	Invited by District	October 25, 2005	February 27, 2006
536	El Monte Union High School District	M.A.	Transportation	Invited by District	September 22, 2005	July 11, 2006
535	Tahoe Truckee Unified School District	M.A.	Transportation	Invited by District	October 26, 2005	March 27, 2006
534	Washington Unified School District	M.A.	Budget Development	Invited by District	September 19, 2005	April 27, 2006
533	Novato Unified School District	M.A.	Technology	Invited by District	October 31, 2005	June 30, 2006 (work only)
532	Ross School District	M.A.	Technology	Invited by District	September 28, 2005	June 30, 2006
531	Golden Valley Unified School District	M.A.	Fiscal Review	Invited by District	September 30, 2005	February 22, 2006 April 5, 2006
530	Carlsbad Unified School District	M.A.	Technology	Invited by District	June 23, 2005	February 24, 2006
529	Clovis Unified School District	M.A.	Technology	Invited by District	September 20, 2005	February 6, 2006
528	San Dieguito Union High School District	M.A.	Special Ed/Transp.	Invited by District	July 20, 2005	March 13, 2006
527	Fresno Unified School District	M.A.	Fiscal Review	Invited by District	August 19, 2005	February 14, 2006
526	Santa Ynez Valley Union High School District	M.A.	Organizational & Staffing	Invited by District	August 9, 2005	January 12, 2006
525	Yolo County Office of Education	M.A.	Organizational & Staffing	Invited by COE	September 2, 2005	March 2, 2006
524	New Haven Unified School District	M.A.	Technology	Invited by District	August 18, 2005	December 6, 2005
523	Santa Rosa City Schools	M.A.	Special Education	Invited by COE	April 20, 2005	December 14, 2005
522	Sierra-Plumas Jt. Unified School District	M.A.	Fiscal Review	Invited by District	August 15, 2005	February 8, 2006
521	Guadalupe Union School District	M.A.	Organizational & Staffing	Invited by District	August 24, 2005	December 12, 2005
520	Culver City Unified School District	M.A.	Child Development	Invited by District	July 29, 2005	January 23, 2006
519	Culver City Unified School District	M.A.	Fiscal Review	Invited by District	July 29, 2005	March 3, 2006 (ML)
518	Novato Unified School District	M.A.	Fiscal Review	Invited by District	July 13, 2005	November 14, 2005
517	Lassen Community College	M.A.	Fiscal Review	Invited by COE	June 23, 2005	January 6, 2006
516	Gridley Unified School District	M.A.	Organizational & Staffing	Invited by District	June 15, 2005	November 29, 2005
515	Chico Unified School District	M.A.	Fiscal Review	Invited by District	July 13, 2005	November 28, 2005
514	Placer County Office of Education	M.A.	Special Education	Invited by COE	May 24, 2005	December 20, 2005
513	Orange CDE/No. Orange SELPA	M.A.	SELPA	Invited by COE	September 9, 2005	June 12, 2006

Study No.	Education Agency	Study Type	Study Topics	Assigned/Invited by	Date Study Requested	Final Report Issued
512	Fillmore Unified School District	M.A.	Fiscal Review	Invited by District	June 30, 2005	October 3, 2005
511	Riverside County Office of Education	M.A.	Technology	Invited by COE	May 31, 2005	January 10, 2006
510	Novato Unified School District	M.A.	Technology	Invited by District	July 5, 2005	April 24, 2006 (services only)
509	Berkeley Unified School District	M.A.	Technology	Invited by District	July 1, 2005	March 31, 2006
508	Silver Valley Unified School District	M.A.	Food Services	Invited by District	April 26, 2005	November 28, 2005
507	Shasta County Office of Education	M.A.	Special Education	Invited by COE	March 29, 2005	October 28, 2005
506	Kerman Unified School District	M.A.	Transportation	Invited by District	June 3, 2005	Ongoing
505	San Diego County Office of Education	M.A.	Technology	Invited by COE	April 21, 2005	Ongoing
504	West Sonoma County Union High School District	F.C.	Fiscal Crisis	Invited by COE	June 1, 2005	September 9, 2005
503	Sutter COE/CTEC	M.A.	Technology	Invited by COE	June 9, 2005	August 29, 2005
502	Cloverdale Unified School District	M.A.	Child Development	Invited by District	June 7, 2005	August 16, 2005
501	Grossmont Union High School District	M.A.	M & O	Invited by District	November 8, 2005	June 26, 2006
500	New West Charter School	AB 139	Extraordinary Audit	Invited by COE	June 30, 2005	December 5, 2005
499	Options for Youth/Opp for Learning Charter Schools	AB 139	Extraordinary Audit	Invited by COE's	March 28, 2005	Ongoing
498	Plumas Unified School District	M.A.	Fiscal Review	Invited by District	April 27, 2005	October 2, 2005
497	Lucia Mar Unified School District	M.A.	Fiscal Review	Invited by District	May 18, 2005	September 9, 2005
496	Ventura County Office of Education	AB 139	Extraordinary Audit	Invited by COE	May 10, 2005	May 25, 2006
495	Clovis Unified School District	M.A.	Curriculum & Instruction	Invited by District	March 7, 2005	September 1, 2005
494	Monterey County SELPA	M.A.	Transportation	Invited by COE	March 11, 2005	November 2, 2005
493	Dry Creek Joint Elementary School District	M.A.	Technology	Invited by District	March 30, 2005	November 3, 2005
492	Butte COE/Biggs Unified School District	M.A.	Fiscal Review	Invited by COE	March 25, 2005	July 28, 2005
491	Konocti Unified School District	M.A.	Fiscal Review	Invited by District	March 24, 2005	September 9, 2005
490	Contra Costa COE/Mt. Diablo Unified School District	M.A.	Technology	Invited by COE	April 8, 2005	March 14, 2006
489	Salinas City Elementary School District	M.A.	Transportation	Invited by District	March 23, 2005	November 29, 2005
488	Sonoma COE/Cloverdale Unified School District	M.A.	Budget Development	Invited by COE	April 5, 2005	July 14, 2005
487	Contra Costa COE/Mt. Diablo Unified School District	AB 139	Extraordinary Audit	Invited by COE	March 31, 2005	April 26, 2005
486	San Joaquin COE/New Hope Elem. School District	M.A.	Fiscal Review	Invited by COE	April 15, 2005	June 6, 2005
485	Lake Tahoe Unified School District	M.A.	Fiscal Review	Invited by District	March 16, 2005	August 22, 2005
484	Mono County Office of Education	M.A.	Technology	Invited by COE	March 9, 2005	August 12, 2005
483	Trona Unified School District	M.A.	Business Office	Invited by District	March 11, 2005	June 30, 2006 (work only)
482	San Bernardino COE/Chino Valley USD	F.C.	Fiscal Crisis	Invited by COE	January 1, 2005	April 19, 2006 (work only)
481	Cucamonga School District	M.A.	Transportation	Invited by District	March 3, 2005	June 8, 2005
480	Tamalpais Union High School District	M.A.	Payroll	Invited by District	February 8, 2005	November 30, 2005
479	Cotati Rohnert Park Unified School District	M.A.	Organizational & Staffing	Invited by District	February 1, 2005	May 31, 2005
478	Tehama COE/Los Molinos Unified School District	M.A.	Fiscal Review	Invited by COE	February 16, 2005	May 12, 2005
477	Jurupa Unified School District	M.A.	Transportation	Invited by District	January 5, 2005	July 14, 2005
476	Trinity Union High School District	M.A.	Organizational & Staffing	Invited by District	November 5, 2004	June 30, 2005
475	Cloverdale Unified School District	M.A.	Fiscal Review	Invited by District	January 24, 2005	June 30, 2005
474	Clovis Unified School District	M.A.	Organizational & Staffing	Invited by District	November 29, 2004	May 10, 2005
473	Pasadena Unified School District	M.A.	Fiscal Review	Invited by District	December 12, 2004	October 24, 2005
472	San Bernardino City Unified School District	M.A.	Facilities	Invited by District	October 14, 2004	July 27, 2005
471	Berkeley Unified School District	M.A.	Attendance/MYP	Invited by District	January 13, 2005	February 9, 2005
470	New Hope Elementary School District	M.A.	Organizational & Staffing	Invited by District	November 18, 2004	April 8, 2005
469	Sonoma COE/Healdsburg Unified School District	M.A.	Fiscal Review	Invited by COE	November 22, 2004	May 31, 2006
468	Pasadena Unified School District	M.A.	Transp/Special Ed.	Invited by District	October 15, 2004	April 26, 2005
467	Elk Grove Unified School District	M.A.	Technology	Invited by District	November 3, 2004	June 3, 2005
466	Orcutt Union School District	M.A.	Technology	Invited by District	December 8, 2004	May 25, 2005
465	Capistrano Unified School District	M.A.	Fiscal Review	Invited by District	September 29, 2004	January 20, 2005

Study No.	Education Agency	Study Type	Study Topics	Assigned/Invited by	Date Study Requested	Final Report Issued
464	Placer COE/Auburn Union School District	M.A.	Fiscal Review	Invited by COE	December 13, 2004	April 21, 2005(Fiscal) June 3, 2005 (Sp. Ed)
463	Oceanside Unified School District	M.A.	Organizational & Staffing	Invited by District	November 12, 2004	March 31, 2005
462	Nevada COE/Twin Ridges Elem. School District	M.A.	Attendance Accounting	Invited by COE	September 14, 2004	February 17, 2005
461	Los Molinos Unified School District	M.A.	Budget Development	Invited by District	November 22, 2004	February 16, 2005
460	Pleasant Valley School District	M.A.	Transportation	Invited by District	July 26, 2004	May 13, 2005
459	Sacramento City Unified School District	M.A.	Transportation	Invited by District	September 22, 2004	March 17, 2005
458	Las Virgenes Unified School District	M.A.	Technology	Invited by District	October 19, 2004	February 8, 2005
457	Rincon Valley Union Elem School District	M.A.	Maint/Facilities	Invited by District	October 15, 2004	June 13, 2005
456	Trinity Union High School District	M.A.	Budget Development	Invited by District	November 1, 2004	February 8, 2005
455	Gold Oak Union School District	M.A.	Budget Development	Invited by District	November 1, 2004	February 3, 2005
454	Stony Creek Jt. Unified School District	M.A.	Organizational & Staffing	Invited by District	October 20, 2004	April 7, 2005
453	Oak Grove Elementary School District	M.A.	Transportation	Invited by District	September 3, 2004	March 23, 2005
452	Brea Olinda Unified School District	M.A.	Technology	Invited by District	September 3, 2004	Ongoing
451	East Side Union High School District	M.A.	Fiscal Review	Invited by District	September 22, 2004	February 25, 2005
450	Santa Barbara School Districts	M.A.	Fiscal Review	Invited by District	October 7, 2004	June 14, 2005
449	San Bernardino COE/Bear Valley USD	AB 139	Extraordinary Audit	Invited by COE	October 7, 2004	Ongoing
448	San Juan Unified School District	M.A.	Fiscal Review	Invited by District	October 8, 2004	January 12, 2005
447	Grossmont Union High School District	M.A.	Scheduling	Invited by District	October 14, 2004	March 11, 2005
446	Monterey COE/Salinas Union High SD	M.A.	Fiscal Review	Invited by COE	October 12, 2004	January 21, 2005
445	Glenn County Office of Education	M.A.	Technology	Invited by COE	September 13, 2004	March 31, 2005
444	Chaffey Jt Union High School District	M.A.	Transportation	Invited by District	September 7, 2004	March 1, 2005
443	Vantage Point Charter School	M.A.	Curriculum & Instruction	Invited by COE	September 15, 2004	January 3, 2005
442	Keyes School District	M.A.	Fiscal Review	Invited by District	September 15, 2004	January 12, 2005
441	Tuolumne County Office of Education	M.A.	Fiscal Review	Invited by COE	September 30, 2004	Nov. 24, 2004
440	Marin County Office of Education	M.A.	Special Education	Invited by COE	August 20, 2004	January 28, 2005
439	Yolo County Office of Education	M.A.	Special Education	Invited by COE	July 31, 2004	December 2, 2004
438	Rim of the World School District	M.A.	Fiscal Review	Invited by District	July 9, 2004	February 2, 2005
437	Berkeley Unified School District	M.A.	Technology	Invited by District	September 9, 2004	April 1, 2005 (services only)
436	Berkeley Unified School District	M.A.	Technology	Invited by District	September 9, 2004	June 30, 2005 (services only)
435	Ontario-Montclair School District	M.A.	Technology	Invited by District	July 23, 2004	December 7, 2004
434	Stanislaus Union School District	M.A.	MYP	Invited by District	August 2, 2004	October 22, 2004
433	Milpitas Unified School District	M.A.	Special Education	Invited by District	July 6, 2004	December 7, 2004
432	Fresno COE/Fresno Unified SD	F.C.	Fiscal Review	Invited by COE	July 28, 2004	Nov. 23, 2004
431	Planada School District	M.A.	Transp./M&O/Facilities	Invited by District	July 22, 2004	April 4, 2005
430	Chawanakee Unified School District	M.A.	Fiscal Review	Invited by District	July 21, 2004	February 8, 2005
429	California Charter Academy	AB 139	Extraordinary Audit	Invited by COE's	July 1, 2004	April 14, 2005
428	Palm Springs Unified School District	M.A.	Business/Facilities	Invited by District	May 12, 2004	April 1, 2005
427	Round Valley Unified School District	M.A.	ASB Review	Invited by District	June 22, 2004	August 12, 2004
426	Vallejo City Unified School District	E.L.	Comprehensive		June 21, 2004	Ongoing
425	Muroc Unified School District	M.A.	Technology	Invited by District	June 7, 2004	August 16, 2004
424	Morgan Hill Unified School District	M.A.	Budget Development	Invited by District	March 30, 2004	November 4, 2004
423	Ojai Unified School District	M.A.	Technology	Invited by District	June 2, 2004	December 3, 2004
422	Needles Unified School District	M.A.	Organizational & Staffing	Invited by District	May 18, 2004	August 17, 2004
421	Compton Community College District	M.A.	Fiscal Review	Invited by COE	May 5, 2004	Dec. 30, 2004
420	Latrobe School District	M.A.	Organizational & Staffing	Invited by District	April 29, 2004	June 9, 2004 (ML)
419	Compton Unified School District	M.A.	Consent Decree	Consent Decree	February 1, 2000	Ongoing
418	San Bernardino County Office of Education	M.A.	Human Resources	Invited by COE	April 14, 2004	July 30, 2004
417	Colusa County Office of Education	M.A.	Child Development	Invited by COE	April 27, 2004	Sept. 15, 2004

Study No.	Education Agency	Study Type	Study Topics	Assigned/Invited by	Date Study Requested	Final Report Issued
416	Sebastopol Union Elementary School District	M.A.	Fiscal Review	Invited by District	April 27, 2004	Sept. 9, 2004
415	Nevada Joint Union High School District	M.A.	Technology	Invited by District	April 23, 2004	June 30, 2004
414	Santa Clara COE/ Morgan Hill Unified SD	AB 139	Extraordinary Audit	Invited by COE	December 18, 2003	May 6, 2004
413	Berkeley Unified School District	F.C.	Comprehensive	Assigned by AB 2859	September 29, 2002	Ongoing
412	Contra Costa County Office of Education	M.A.	Organizational & Staffing	Invited by COE	April 14, 2004	July 26, 2004
411	Mineral Elementary School District	M.A.	Fiscal Review	Invited by District	April 14, 2004	Sept. 13, 2004
410	San Lorenzo Valley Unified School District	M.A.	Food Services	Invited by District	April 6, 2004	June 22, 2004
409	LeGrand Union High School District	M.A.	Organizational & Staffing	Invited by District	April 14, 2004	October 14, 2004
408	Marysville Joint Unified School District	M.A.	Maint./Facilities	Invited by District	April 16, 2004	May 21, 2004
407	Rowland/Walnut Unified School Districts	M.A.	Transportation	Invited by District	April 2, 2004	August 2, 2004
406	Shasta County Office of Education	M.A.	Technology	Invited by COE	April 2, 2004	May 18, 2005
405	Palos Verdes Peninsula Unified School District	M.A.	Technology	Invited by District	April 12, 2004	Sept. 3, 2004
404	Dry Creek Joint Elementary School District	M.A.	Technology	Invited by District	March 18, 2004	April 15, 2005 (services only)
403	Santa Cruz COE/Santa Cruz City Schools	M.A.	Fiscal Review	Invited by COE	February 25, 2004	October 28, 2004
402	Roseville Joint Union High School District	M.A.	Facilities/Accounting	Invited by District	March 10, 2004	April 13, 2004
401	Kerman Unified School District	M.A.	Business Support	Invited by District	March 18, 2004	Sept. 1, 2004
400	Clovis Unified School District	M.A.	Organizational & Staffing	Invited by District	March 8, 2004	June 14, 2004
399	Bend Elementary School District	M.A.	Fiscal Review	Invited by District	March 2, 2004	May 6, 2004
398	Nevada Union High School District	M.A.	Fiscal Review	Invited by District	February 20, 2004	April 20, 2004
397	Kings County Office of Education	M.A.	Transportation	Invited by District	February 23, 2004	June 2, 2004
396	Wm. S. Hart Unified School District	M.A.	Special Education	Invited by District	February 10, 2004	April 20, 2004
395	East Side Union High School District	M.A.	Maint./Facilities	Invited by District	January 22, 2004	June 30, 2004
394	North Region SELPA	M.A.	SELPA	Invited by District	January 12, 2004	February 18, 2004
393	Rio School District	M.A.	Fiscal Review	Invited by District	January 30, 2004	June 30, 2004
392	Upland Unified School District	M.A.	Transportation	Invited by District	January 30, 2004	May 11, 2004
391	East Side Union High School District	M.A.	Fiscal Review	Invited by District	January 30, 2004	May 9, 2005
390	Esparto Unified School District	M.A.	Technology/Maintenance	Invited by District	January 27, 2004	February 26, 2004 June 17, 2004(M&O)
389	Las Virgenes Unified School District	M.A.	Fiscal Review	Invited by District	January 12, 2004	April 13, 2004
388	Williams Unified School District	M.A.	Food Services	Invited by District	January 8, 2004	April 23, 2004
387	Summerville Union High School District	M.A.	Food Services	Invited by District	December 16, 2003	March 25, 2004
386	Nevada Union High School District	M.A.	Technology	Invited by District	December 11, 2003	March 8, 2004
385	Oakland Unified School District	E.L.	Comprehensive	SB 39	June 2, 2003	Ongoing
384	West Fresno Elementary School District	E.L.	Comprehensive	AB 38	March 6, 2003	Ongoing
383	Silicon Valley JPTA	M.A.	Transportation	Invited by District	November 6, 2003	May 13, 2004
382	Antelope Valley SELPA	M.A.	Fiscal Review	Invited by District	November 5, 2003	February 2, 2004
381	Grossmont Union High School District	M.A.	Sp. Ed./ Transp/M&O/ROP	Invited by District	October 24, 2003	May 6, 2004 (I) May 25, 2004 (II)
380	Adelanto School District	M.A.	Fiscal Review	Invited by District	November 7, 2003	February 17, 2004
379	Siskiyou County Office of Education	M.A.	Human Resources	Invited by COE	October 17, 2003	March 4, 2004
378	Sutter County Office of Education	M.A.	Organizational & Staffing	Invited by COE	October 17, 2003	March 24, 2004
377	Ravenswood City Elementary	M.A.	Human Resources	Invited by District	March 26, 2003	March 16, 2004 April 20, 2004
376	San Francisco Unified School District	M.A.	Charter School	Invited by COE	July 10, 2003	August 18, 2004
375	Westside Union School District	M.A.	Budget Development	Invited by District	September 29, 2003	March 2, 2004
374	Riverside County Office of Education	M.A.	Human Resources	Invited by COE	September 23, 2003	April 5, 2004
373	Amador County Office of Education	M.A.	Human Resources	Invited by COE	August 26, 2003	May 5, 2004
372	Golden Valley Unified School District	M.A.	Fiscal Review	Invited by District	September 15, 2003	February 20, 2004
371	Hanford Joint Union High School District	M.A.	Transportation	Invited by District	September 25, 2003	Dec. 15, 2003
370	Chowchilla Union High School District	M.A.	Food Services	Invited by District	September 19, 2003	January 15, 2004

Study No.	Education Agency	Study Type	Study Topics	Assigned/Invited by	Date Study Requested	Final Report Issued
369	Gateway Unified School District	M.A.	Technology	Invited by District	September 16, 2003	April 7, 2004
368	Alameda COE/Berkeley Unified SD	AB 139	Extraordinary Audit	Invited by COE	April 1, 2003	January 31, 2002
367	Alameda COE/Hayward Unified School District	AB 139	Extraordinary Audit	Invited by COE	November 19, 2002	October 14, 2003
366	Carlsbad Unified School District	M.A.	Organizational & Staffing	Invited by District	August 6, 2003	June 14, 2004
365	Westminster School District	M.A.	Budget Development	Invited by District	July 1, 2003	October 4, 2004
364	Riverside County Office of Education	M.A.	Curriculum & Instruction	Invited by COE	June 24, 2003	Nov. 21, 2003
363	Alameda COE/Hayward Unified School District	M.A.	Fiscal Expert	Invited by District	June 25, 2003	October 14, 2003
362	Berkeley Unified School District	M.A.	Food Services	Invited by District	June 11, 2003	January 29, 2004
361	Santa Ana Unified School District	F.C.	Fiscal Review	Invited by District	July 24, 2003	Ongoing
360	Carmel Unified School District	M.A.	Organizational & Staffing	Invited by District	August 30, 2003	Sept. 12, 2003
359	Novato Unified School District	M.A.	Fiscal Review	Invited by District	August 5, 2003	Sept. 10, 2004
358	Monterey COE/Greenfield Union School District	F.C.	Fiscal Review	Invited by COE	August 6, 2003	Dec. 17, 2003
357	Atwater Elementary School District	M.A.	Transportation	Invited by District	June 30, 2003	October 10, 2003
356	Corning Union Elementary School District	F.C.	Fiscal Review	Invited by District	July 29, 2003	December 4, 2003
355	Fremont Unified School District	M.A.	Technology	Invited by District	July 17, 2003	Sept. 15, 2003
354	Siskiyou COE/Etna Union School District	F.C.	Fiscal Review	Invited by COE	June 6, 2003	December 4, 2003
353	Tamalpais Union High School District	M.A.	Technology	Invited by District	June 13, 2003	See #350
352	Surprise Valley Jt. Unified School District	M.A.	Budget Development	Invited by District	May 30, 2003	August 19, 2003
351	Alameda Unified School District	M.A.	Technology	Invited by District	April 29, 2003	July 7, 2003
350	Tamalpais Union High School District	M.A.	Technology	Invited by District	April 28, 2003	August 25, 2003
349	San Mateo-Foster City School District	M.A.	Transportation	Invited by District	March 18, 2003	May 6, 2003
348	Grant Union High School District	M.A.	Transportation	Invited by District	September 23, 2002	October 1, 2003
347	Tuolumne County Office of Education	M.A.	Organizational & Staffing	Invited by District	March 28, 2003	July 19, 2003
346	Sacramento COE/Natomas Unified SD	M.A.	Fiscal Review	Invited by COE	February 5, 2003	May 7, 2003
345	Denair Unified School District	M.A.	Fiscal Review/Sp. Ed.	Invited by District	February 6, 2003	April 28, 2003
344	Lake County Office of Education	M.A.	Transportation	Invited by COE	January 17, 2003	March 6, 2003
343	San Carlos Elementary School District	M.A.	Budget Development	Invited by District	March 3, 2003	May 7, 2003
342	Fallbrook School District	M.A.	Technology	Invited by District	November 22, 2002	March 3, 2003
341	Fresno COE/West Fresno SD	M.A.	Fiscal Review	Invited by COE	November 15, 2002	January 17, 2003
340	Pleasant Valley School District	M.A.	Transportation	Invited by District	February 11, 2003	February 25, 2003
339	Ontario-Montclair School District	M.A.	Fiscal Review	Invited by District	January 22, 2003	June 19, 2003
338	Holtville Unified School District	M.A.	Fiscal Review	Invited by District	February 4, 2003	February 26, 2003
337	Palm Springs Unified School District	M.A.	Technology	Invited by District	January 24, 2003	Sept. 5, 2003
336	Pollock Pines Elementary School District	M.A.	Comprehensive	Invited by District	October 28, 2002	May 9, 2003
335	Amador COE/Amador Unified School District	M.A.	Budget Development	Invited by COE	November 15, 2002	March 20, 2003
334	Gridley Unified School District	M.A.	Transportation	Invited by District	October 28, 2002	April 15, 2003
333	Moreno Valley Unified School District	M.A.	Organizational & Staffing	Invited by District	October 3, 2002	August 1, 2003
332	Central Union School District	M.A.	Curriculum/ Technology	Invited by District	October 16, 2002	July 1, 2003
331	San Bernardino COE/Victor Valley UHSD	M.A.	Budget Development	Invited by COE	October 11, 2002	Nov. 12, 2002
330	San Bernardino COE/Trona Jt. USD	M.A.	Fiscal Advisor	Invited by COE	August 16, 2002	Dec. 8, 2003 - C&I June 30, 2005 - FA
329	Placerville Union Elementary School District	M.A.	Comprehensive	Invited by District	November 5, 2002	April 22, 2003
328	Hart (Wm S.) Union High School District	M.A.	Special Education	Invited by District	April 8, 2002	July 9, 2003
327	Alameda COE/Oakland Unified School District	F.E.	Fiscal Emergency	Invited by COE	October 11, 2002	August 2, 2004
326	Inglewood Unified School District	M.A.	Business Services	Invited by District	September 26, 2002	June 25, 2003 July 1, 2003
325	Mendota Unified School District	M.A.	Technology	Invited by District	November 4, 2002	July 1, 2003
324	Stanislaus COEM.A.		Technology	Invited by COE	August 28, 2002	February 21, 2003
323	El Dorado Union High School District	M.A.	Organizational & Staffing	Invited by COE	October 11, 2002	February 5, 2003
322	Anderson Union High School District	M.A.	Technology	Invited by District	September 16, 2002	December 2, 2002

Study No.	Education Agency	Study Type	Study Topics	Assigned/Invited by	Date Study Requested	Final Report Issued
321	Riverside County Office of Education	M.A.	Organizational & Staffing	Invited by COE	August 9, 2002	Nov. 21, 2003
320	Coachella Valley Unified School District	M.A.	Transportation	Invited by District	September 16, 2002	Nov. 21, 2002
319	Stockton Unified School District	M.A.	Transportation	Invited by District	May 22, 2002	June 11, 2002
318	Gilroy Unified School District	M.A.	Technology	Invited by District	June 13, 2002	August 26, 2002
317	Jurupa Unified School District	M.A.	Fiscal Review	Invited by District	June 19, 2002	Sept. 25, 2002
316	Siskiyou COE/Weed Elementary	M.A.	Fiscal Review	Invited by COE	June 7, 2002	August 15, 2002
315	San Dieguito Union High School District	M.A.	Transportation	Invited by District	February 1, 2002	April 11, 2003
314	Pajaro Valley School District	M.A.	Fiscal Review	Invited by District	June 19, 2002	October 25, 2002
313	Lompoc Unified School District	M.A.	Fiscal Review	Invited by District	June 17, 2002	Sept. 23, 2002
312	Sutter COE	M.A.	Transportation (SELPA)	Invited by COE	May 22, 2002	June 26, 2002
311	Inyo COE/Bishop UHSD	AB 139	Extraordinary Audit	Invited by COE	May 22, 2002	April 16, 2002
310	Placer COE/Prosser Creek	AB 139	Extraordinary Audit	Invited by COE	April 22, 2002	October 23, 2002
309	Carlsbad Unified School District	M.A.	Food Services	Invited by District	May 6, 2002	July 14, 2003
308	Contra Costa COE/Pittsburg	AB 139	Extraordinary Audit	Invited by COE	April 24, 2002	June 15, 2003
307	Contra Costa COE/Antioch	AB 139	Extraordinary Audit	Invited by COE	April 24, 2002	April 30, 2002
306	Santa Barbara Elementary and High School Districts	M.A.	Fiscal Review	Invited by District	April 24, 2002	June 25, 2002
305	Lucia Mar Unified School District	M.A.	Organizational & Staffing	Invited by District	May 2, 2002	Sept. 3, 2002
304	Lakeside Union School District	M.A.	MOT	Invited by District	April 16, 2002	May 9, 2002
303	Amador County Office of Education	M.A.	Transportation	Invited by COE	April 16, 2002	Sept. 10, 2002
302	Shasta Union High School District	M.A.	Network	Invited by District	April 15, 2002	Sept. 24, 2002
301	Gateway Unified School District	M.A.	Technology	Invited by District	April 12, 2002	July 29, 2002
300	Pacific Grove Unified School District	M.A.	Special Education	Invited by District	March 13, 2002	May 23, 2002
299	Pacific Grove Unified School District	M.A.	M & O	Invited by District	March 1, 2002	May 13, 2003
298	Red Bluff Union Elementary School District	M.A.	Fiscal Review	Invited by COE/District	March 5, 2002	May 21, 2002
297	Ukiah Unified School District	M.A.	Technology	Invited by District	January 28, 2002	June 28, 2002
296	Gateway Unified School District	M.A.	Technology	Invited by District	March 6, 2002	May 24, 2002
295	Inyo COE/Big Pine	M.A.	Fiscal Review	Invited by COE	February 28, 2002	May 15, 2002
294	Milpitas Unified School District	M.A.	Network	Invited by District	February 1, 2002	February 26, 2002
293	Capistrano Unified School District	M.A.	Transportation	Invited by District	January 28, 2002	May 8, 2002
292	Santa Cruz County Office of Education	M.A.	Personnel	Invited by COE	January 28, 2002	October 22, 2002
291	Rescue Union School District	M.A.	Personnel	Invited by District	February 5, 2002	June 5, 2002
290	Menifee Union Elementary School District	M.A.	Transportation	Invited by District	January 28, 2002	May 17, 2002
289	Nevada COE	M.A.	Charter School Attendance	Invited by COE		January 7, 2002 January 28, 2002
288	Lake Elsinore Unified School District	M.A.	Sp. Ed./ Technology	Invited by District	December 19, 2001	Sept. 6, 2002 Sept. 30, 2002
287	Inglewood Unified School District	M.A.	Purchasing	Invited by District	December 18, 2001	July 16, 2002
286	Riverside Unified School District	M.A.	Purchasing/ Warehouse	Invited by District	December 14, 2001	April 18, 2002
285	Solano COE	M.A.	Transportation	Invited by COE	October 19, 2001	February 14, 2002
284	San Luis Obispo COE	M.A.	SELPA	Invited by COE	December 21, 2001	May 14, 2002
283	Milpitas Unified School District	M.A.	Technology	Invited by District	December 6, 2001	January 18, 2002
282	Nuview Union School District	M.A.	Transportation	Invited by District	December 19, 2001	May 31, 2002
281	Santa Clara COE/Orchard School District	F.C.	Comprehensive	Invited by COE	November 16, 2001	Sept. 20, 2002
280	Alum Rock Union Elementary	M.A.	Fiscal Review	Invited by District	July 9, 2001	May 21, 2003
279	Fullerton Jt. Union School District	M.A.	Transportation	Invited by District	October 3, 2001	June 27, 2002
278	Mill Valley Elementary School District	M.A.	Facilities	Invited by District	October 16, 2001	April 16, 2002
277	Ceres Unified School District	M.A.	Comprehensive	Invited by District	July 27, 2001	January 30, 2002
276	Merced COE/Planada Elem School District	M.A.	Fiscal Review	Invited by COE	October 1, 2001	February 26, 2002
275	Berkeley Unified School District	F.C.	Fiscal Review/ Advisor	Invited by COE	October 9, 2001	(Ongoing)
274	Moreno Valley Unified School District	M.A.	Fiscal Review	Invited by District	October 17, 2001	Nov. 17, 2001
273	Guadalupe Union School District	M.A.	Other Services	Invited by District	September 1, 2001	Sept. 11, 2002

Study No.	Education Agency	Study Type	Study Topics	Assigned/Invited by	Date Study Requested	Final Report Issued
272	Belridge School District	M.A.	Fiscal Review	Invited by COE	September 4, 2001	February 8, 2002
271	So. Humboldt Unified School District	M.A.	Management Review	Invited by District	August 29, 2001	December 3, 2001
270	Kings County Office of Education	M.A.	Transportation	Invited by COE	September 18, 2001	October 4, 2001
269	Madera Unified School District	M.A.	Comprehensive	Invited by District	July 30, 2001	April 2, 2002
268	Benicia Unified School District	M.A.	Technology	Invited by District	November 17, 2000	Sept. 14, 2001
267	Muroc Unified School District	M.A.	Maint./Transp/Food Svc.	Invited by District	August 27, 2001	January 10, 2002
266	San Mateo COE/Burlingame Elementary SD	M.A.	Budget Development	Invited by COE	July 19, 2001	March 13, 2002
265	Ravenswood City Elementary	F.C.	Comprehensive	Invited by COE	August 16, 2001	March 1, 2002
264	Trona Unified School District	M.A.	Fiscal Review	Invited by District	August 2, 2001	November 6, 2001
263	Gilroy Unified School District	M.A.	Technology (E-rate)	Invited by District	July 26, 2001	April 10, 2002
262	Fullerton Jt. Union School District	M.A.	Transportation	Invited by District	June 28, 2001	July 20, 2001
261	Siskiyou COE/Weed Elem.	F.C.	Fiscal Crisis	Invited by COE	July 2, 2001	July 13, 2001
260	Shasta Union High School District	M.A.	Technology	Invited by District	July 5, 2001	October 9, 2001
259	Bass Lake Jt. USD (Eastern Madera)	M.A.	Transportation	Invited by District	July 9, 2001	February 25, 2002
258	Yolo County Office of Education	M.A.	Bus/Org. & Staffing	Invited by COE	June 26, 2001	January 22, 2002
257	Lancaster School District	M.A.	Fiscal Review	Invited by District	June 21, 2001	October 2, 2001
256	Gilroy Unified School District	M.A.	Technology	Invited by District	May 24, 2001	October 1, 2001
255	Sonoma COE/Cloverdale Unified School District	M.A.	Staffing/Fiscal Review	Invited by COE	May 1, 2001	July 16, 2001
254	Merced COE/Planada Elem School District	M.A.	Fiscal Advisor	Invited by COE	February 1, 2002	May 23, 2002
253	Madera Unified School District	M.A.	M & O	Invited by District	May 10, 2001	Sept. 19, 2001
252	Fresno COE/West Fresno School District	M.A.	Fiscal Review	Invited by COE	May 7, 2001	Nov. 19, 2001
251	Humboldt COE/Eureka City Schools	M.A.	Fiscal Review	Invited by COE	May 3, 2001	June 21, 2001
250	Solano County Office of Education	M.A.	Transportation (SELPA)	Invited by COE	April 24, 2001	August 27, 2001
249	Poway Unified School District	M.A.	Organizational & Staffing	Invited by District	April 4, 2001	October 23, 2001
248	Santa Maria Joint High School District	M.A.	Organizational & Staffing	Invited by District	December 29, 2000	January 9, 2002
247	Santa Maria-Bonita School District	M.A.	Organizational & Staffing	Invited by District	December 12, 2000	January 7, 2002
246	Chico Unified School District	M.A.	Fiscal Review - MYP	Invited by District	March 19, 2001	May 26, 2001
245	Kernville Union Elementary School District	M.A.	Food Services	Invited by District	March 2, 2001	October 22, 2001
244	Tehachapi Unified School District	M.A.	SELPA	Invited by District	February 26, 2001	June 8, 2001
243	Santa Clara County Office of Education	M.A.	Technology	Invited by District	March 6, 2001	Sept. 11, 2001
242	Santa Barbara Elementary and High School Districts	M.A.	Organizational & Staffing	Invited by District	February 1, 2001	June 28, 2001
241	West Contra Costa Unified School District	E.L.	Comprehensive	Assigned by AB 2265	September 22, 2000	July 2, 2001
240	Riverside County Office of Education	M.A.	M & O	Invited by COE	January 9, 2001	May 1, 2001
239	Sierra Sands Unified School District	M.A.	Transportation	Invited by District	November 28, 2000	April 18, 2001
238	Lindsay Unified School District	M.A.	MOT	Invited by District	November 28, 2000	May 23, 2001
237	Albany Unified School District	M.A.	Fiscal Review	Invited by District	December 6, 2000	April 24, 2001
236	Madera Unified School District	M.A.	Transportation	Invited by District	December 11, 2000	April 25, 2001
235	San Luis Coastal Unified School District	M.A.	MYP	Invited by COE and DO	December 12, 2000	April 4, 2001
234	Contra Costa County Office of Education	M.A.	Personnel	Invited by COE	November 30, 2000	May 11, 2001
233	Lompoc Unified School District	M.A.	External Evaluation Study	Invited by District	November 30, 2000	May 3, 2001
232	Benicia Unified School District	M.A.	Technology	Invited by District	November 3, 2000	Sept. 13, 2001
231	Tuolumne County Office of Education	M.A.	Fiscal Review	Invited by COE	November 7, 2000	May 14, 2001
230	Oakdale Joint Unified School District	M.A.	Fiscal Review	Invited by District	November 7, 2000	March 20, 2001
229	Menifee Union Elementary School District	M.A.	Food Services	Invited by District	November 3, 2000	February 6, 2001
228	East Side Union High School District	M.A.	Fiscal Review	Invited by District	November 3, 2000	May 11, 2001
227	Lucia Mar Unified School District	M.A.	Fiscal Advisory	Invited by District	October 24, 2000	Dec. 31, 2000 (services only)
226	Mill Valley Elementary School District	M.A.	Fiscal Review	Invited by District	October 24, 2000	Nov. 14, 2000
225	Redlands Unified School District	M.A.	Transportation	Invited by District	October 18, 2000	June 26, 2001
224	Guadalupe Elementary School District	M.A.	External Evaluation Study	Invited by District	October 13, 2000	August 31, 2001

Study No.	Education Agency	Study Type	Study Topics	Assigned/Invited by	Date Study Requested	Final Report Issued
223	Capistrano Unified School District	M.A.	Technology	Invited by District	August 1, 2000	March 23, 2001
222	Lake Elsinore Unified School District	M.A.	Transportation	Invited by District	June 30, 2000	January 30, 2001
221	Benicia Unified School District	M.A.	Technology	Invited by District	October 6, 2000	October 30, 2000
220	Ross Valley School District	M.A.	Organizational & Staffing	Invited by District	October 3, 2000	February 2, 2001
219	Emery Unified School District	E.L.	Fiscal Advisor	Assigned by AB 96	October 2, 2000	Ongoing
218	Palm Springs Unified School District	M.A.	Technology	Invited by District	September 21, 2000	May 1, 2001
217	Benicia Unified School District	M.A.	Technology	Invited by District	September 13, 2000	January 5, 2001
216	Marin COE/Mill Valley Elementary School District	M.A.	Fiscal Review - MYP	Invited by COE and Dist.	September 8, 2000	Nov. 14, 2000
215	Etna Union Elementary School District	M.A.	Fiscal Review - MYP	Invited by District	September 5, 2000	Nov. 14, 2000
214	Solano County Office of Education	M.A.	Technology	Invited by COE	July 25, 2000	January 23, 2001
213	Hemet Unified School District	M.A.	Transportation	Invited by District	July 3, 2000	March 21, 2001
212	San Luis Obispo County Office of Education	M.A.	Technology Survey	Invited by COE	July 26, 2000	February 22, 2001
211	Lompoc Unified School District	M.A.	Technology	Invited by District	July 24, 2000	Sept. 12, 2001
210	Chowchilla Union High School District	M.A.	Technology	Invited by District	June 29, 2000	August 2, 2000 (services only)
209	Oakdale Joint Unified School District	M.A.	Eval. Grand Jury Findings	Invited by District	June 30, 2000	July 26, 2000
208	Pioneer Union School District	M.A.	Transportation	Invited by District	June 16, 2000	Sept. 13, 2000
207	Roseville City Elementary School District	M.A.	Technology	Invited by District	May 12, 2000	July 26, 2000
206	Ojai Unified School District	M.A.	Transportation	Invited by District	May 11, 2000	August 4, 2000
205	Banning Unified School District	M.A.	Transportation	Invited by District	May 3, 2000	Sept. 5, 2000
204	Mount Diablo Unified School District	M.A.	M & O	Invited by District	May 3, 2000	August 22, 2000
203	Anderson Union High School District	M.A.	Transportation	Invited by District	May 3, 2000	Sept. 20, 2000
202	Gold Trail Union School District	M.A.	Organizational & Staffing	Invited by District	May 1, 2000	August 11, 2000
201	Sutter COE	M.A.	Fiscal Review	Invited by COE	April 28, 2000	August 2, 2000
200	San Pasqual Union School District	M.A.	Fiscal Review	Invited by District	April 13, 2000	June 23, 2000
199	National School District	M.A.	Technology	Invited by District	April 11, 2000	Dec. 21, 2000
198	San Luis Obispo COE	M.A.	Technology	Invited by COE	April 3, 2000	June 28, 2000
197	Napa COE/Calistoga Unified School District SELPA	M.A.	SELPA	Invited by COE	March 27, 2000	August 28, 2000
196	Lindsay Unified School District	M.A.	Food Service	Invited by District	March 17, 2000	October 17, 2000
195	Guerneville School District	M.A.	Fiscal Review	Invited by District	March 9, 2000	May 22, 2000
194	Oakland Unified School District	M.A.	SELPA	Invited by District	March 2000	Sept. 13, 2000
193	Camino Union School District	M.A.	Organizational & Staff	Invited by District	March 6, 2000	June 12, 2000
192	Esparto Unified School District	M.A.	Organizational & Staffing	Invited by District	March 2, 2000	Sept. 19, 2000
191	Hanford Joint Union High School District	M.A.	M & O	Invited by District	February 23, 2000	June 28, 2000
190	Madera County Office of Education	M.A.	Technology	Invited by COE	February 16, 2000	May 5, 2002
189	Thermalito Union School District	M.A.	Technology	Invited by District	January 28, 2000	August 3, 2000
188	Lompoc Unified School District	M.A.	Technology	Invited by District	January 12, 2000	July 25, 2000
187	San Francisco Unified School District	M.A.	Staffing	Invited by District	January 4, 2000	March 3, 2000
186	Larkspur Elementary School District	M.A.	Organizational & Staffing	Invited by District	December 15, 1999	April 26, 2000
185	Chowchilla Union High School District	M.A.	Technology	Invited by District	December 15, 1999	July 26, 2000
184	Stanislaus COE	M.A.	Budget and Staffing	Invited by COE	December 8, 1999	March 20, 2000
183	Monterey COE/Monterey Peninsula SD	F.C.I.	Fiscal Review	Assigned by COE	December 7, 1999	March 30, 2000
182	Shasta COE	M.A.	Technology	Invited by COE	December 1, 1999	June 15, 2000
181	Glendale Unified School District	M.A.	Organizational & Staffing	Invited by District	December 1, 1999	May 11, 2000
180	West Sonoma County Union High School District	M.A.	Transp./Custodial	Invited by District	November 24, 1999	August 14, 2000
179	Chowchilla Elementary School District	M.A.	Technology	Invited by District	November 23, 1999	February 2000
178	San Marcos Unified School District	M.A.	Organizational & Staffing	Invited by District	November 14, 1999	October 2, 2000
177	Dos Palos-Oro Loma Unified School District	M.A.	District Services	Invited by District	November 9, 1999	June 6, 2000
176	Lucia Mar Arroyo Grande	M.A.	Fiscal Advisory	Invited by District	November 8, 1999	March 2000 (services only)
175	Pleasant Valley Joint Union School District	M.A.	Fiscal Review	Invited by District	November 3, 1999	Dec. 14, 1999

Study No.	Education Agency	Study Type	Study Topics	Assigned/Invited by	Date Study Requested	Final Report Issued
174	Ross Valley School District	M.A.	Fiscal Review	Invited by District	November 3, 1999	March 27, 2000
173	Waterford Unified School District	M.A.	External Evaluation Study	Invited by District	November 1999	April 2000
172	Guadalupe School District	M.A.	External Evaluation Study	Invited by District	November 1999	April 2000
171	Jamul-Dulzura Union Elementary School District	M.A.	Fiscal Review	Invited by District	October 12, 1999	June 18, 2000
170	Kings COE	M.A.	M & O	Invited by District	October 6, 1999	January 26, 2000
169	Golden Plains Unified School District	M.A.	Comprehensive	Invited by District	October 6, 1999	February 8, 2000
168	Sutter COE/Live Oak Unified School District	M.A.	Fiscal Review	Invited by COE	October 1, 1999	Dec. 29, 1999
167	Rosedale Union Elementary School District	M.A.	Transportation	Invited by District	September 23, 1999	January 6, 2000
166	Nevada Joint Union High School District	M.A.	Technology	Invited by District	August 16, 1999	February 2000
165	San Rafael City Schools	M.A.	M & O	Invited by District	August 10, 1999	Nov. 11, 1999
164	Contra Costa COE/John Swett Unified School District	F.C.I.	Fiscal Advisor	Invited by COE	July 19, 1999	July 30, 2000 (services only)
163	Paso Robles Joint Unified School District	M.A.	Accounting	Invited by District	July 14, 1999	October. 19, 1999
162	Ontario-Montclair School District	M.A.	Transportation	Invited by District	June 29, 1999	January 12, 2000
161	Sonoma COE SELPA	M.A.	Transportation	Invited by COE	June 18, 1999	October 19, 1999
160	Los Banos Unified School District	M.A.	Budget and Staffing	Invited by District	June 9, 1999	Dec. 17, 1999
159	Inyo County Office of Education	M.A.	SELPA	Invited by COE	May 17, 1999	June 22, 2000
158	Yolo County Office of Education	M.A.	ROP & Court Comm.	Invited by COE	May 13, 1999	August 2, 2000
157	San Francisco Unified School District	F.C.I.	Fiscal Review	Assigned by SPI	April 28, 1999	April 17, 2000
156	Burlingame Elementary School District	M.A.	Bldg Fund Records Audit	Invited by COE	April 21, 1999	June, 1999
155	San Mateo County Office of Education	M.A.	Transportation	Invited by COE	April 21, 1999	October 5, 1999
154	Oceanside Unified School District	M.A.	Transportation	Invited by District	April 19, 1999	August 18, 1999
153	Oakland Unified School District	M.A.	Fiscal Review	Invited by District	April 14, 1999	January 31, 2000
152	Berkeley Unified School District	M.A.	Technology	Invited by District	April 14, 1999	Sept. 30, 1999
151	Fairfax Elementary School District	M.A.	Food Services	Invited by District	March 19, 1999	May 3, 1999
150	Hemet Unified School District	M.A.	Special Education	Invited by District	March 10, 1999	Feb. 16, 2000
149	Plumas COE/Plumas Unified SD	M.A.	Technology	Invited by District	February 19, 1999	July 26, 1999
148	Mt. Shasta Union School District	M.A.	Enrollment	Invited by District	February 10, 1999	April 26, 1999
147	Bassett Unified School District	M.A.	Organizational & Staffing	Invited by District	February 3, 1999	July 22, 1999
146	Grossmont Union High School District	M.A.	Technology	Invited by District	February 2, 1999	August 13, 1999
145	Orland Unified School District	M.A.	Financial Projection	Invited by District	January 28, 1999	Feb. 19, 1999
144	Hemet Unified School District	M.A.	M & O	Invited by District	January 25, 1999	July 12, 1999
143	Sutter County Office of Education	M.A.	Technology	Invited by COE	January 14, 1999	May 15, 1999
142	Tehama County Office of Education	M.A.	Transportation	Invited by COE	December 21, 1998	Completed
141	Vallecito Union Elementary School District	M.A.	MYP	Invited by District	December 16, 1998	January 12, 1999
140	El Dorado County Office of Education	M.A.	Bus./Org. & Staffing	Invited by COE	November 1998	June 23, 1999
139	San Joaquin County Office of Education	M.A.	Organizational & Staffing	Invited by COE	November 17, 1998	October 12, 1999
138	Tahoe-Truckee Unified School District	M.A.	Fiscal/Org. & Staffing	Invited by District	September 26, 1998	Nov. 19, 1998
137	Ukiah Unified School District	M.A.	Transportation	Invited by District	September 21, 1998	Feb. 17, 1999
136	Potter Valley Unified School District	M.A.	Transportation	Invited by District	September 21, 1998	July 8, 1999
135	Tamalpais Union High School District	M.A.	Fiscal Review	Invited by District	September 8, 1998	October 13, 1998
134	Vallejo City Unified School District	M.A.	Personnel	Invited by District	August 25, 1998	March 25, 1999
133	Golden Valley Unified School District	M.A.	Reorganization	Invited by District	June 29, 1998	April 19, 1999
132	Orland Unified School District	M.A.	Fiscal Review	Invited by District	June 3, 1998	July 23, 1998
131	Big Oak Flat-Groveland Unified School District	M.A.	District Services, MYP	Invited by District	April 22, 1998	June 25, 1998
130	San Rafael City Schools	M.A.	Technology	Invited by District	April 21, 1998	July 30, 1998
129	Lost Hills Elementary School District	M.A.	District Reorganization	Invited by District	April 20, 1998	August 26, 1998
128	Capistrano Unified School District	M.A.	Technology Review	Invited by District	April 10, 1998	March 13, 1998
127	Val Verde Unified School District	M.A.	Fiscal Review	Invited by District	March 27, 1998	June 30, 1998
126	astern Sierra Unified School District	M.A.	District Services	Invited by District	March 27, 1998	August 7, 1998
125	Sacramento City Unified School District	M.A.	Transportation	Invited by District	March 20, 1998	Sept. 22, 1998

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124	Mount Diablo Unified School District	M.A.	Technology	Invited by District	February 18, 1998	June 29, 1998
123	Contra Costa COE/Antioch Unified School District	F.C.	Fiscal Review	Assigned by COE	January 29, 1998	August 5, 1998
122	National School District	M.A.	Transportation	Invited by District	December 12, 1997	May 11, 1998
121	Camptonville Elementary School District	M.A.	Attendance Accounting	Assigned by Yuba COE	December 2, 1997	Completed
120	Cuyama Jt. Unified School District	M.A.	District Services	Invited by District	November 7, 1997	May 26, 1998
119	Sweetwater Union High School District	M.A.	Staffing	Invited by District	October 28, 1997	June 30, 1998
118	Klamath-Trinity Joint Unified School District	M.A.	Budget Development	Invited by District	October 24, 1997	June 30, 1998
117	Santa Monica Malibu Unified School District	M.A.	Transportation	Invited by District	October 24, 1997	April 3, 1998
116	North Monterey County Unified School District	M.A.	Food Service	Invited by District	October 24, 1997	May 28, 1998
115	Roseville City Elementary School District	M.A.	Purchasing	Invited by District	October 23, 1997	February 27, 1998
114	Pittsburg Unified School District	M.A.	Organizational & Staffing	Invited by District	October 10, 1997	June 26, 1998
113	Lamont Elementary School District	M.A.	Fiscal Review	Invited by District	October 6, 1997	February 27, 1998
112	Laton Unified School District	M.A.	District Services	Invited by District	September 23, 1997	Dec. 30, 1997
111	River Delta Unified School District	M.A.	Food Service	Invited by District	September 19, 1997	February 6, 1998
110	Blochman Union Elementary School District	M.A.	Fiscal Review	Invited by District	September 17, 1997	June 5, 1998
109	Hughes-Elizabeth Lakes Elementary School District	M.A.	Organizational & Staffing	Invited by District	September 12, 1997	Nov. 17, 1997
108	Cloverdale Unified School District	M.A.	Fiscal Review	Assigned by Sonoma COE	September 2, 1997	January 15, 1998
107	Capistrano Unified School District	M.A.	Technology	Invited by District	July 3, 1997	March 13, 1998
106	Santa Clara Unified School District	M.A.	Transportation	Invited by District	June 11, 1997	May 22, 1998
105	Delano Union Elementary School District	M.A.	Staffing	Invited by District	May 27, 1997	November 7, 1997
104	Shoreline Unified School District	M.A.	District Services	Invited by District	May 9, 1997	October 1, 1997
103	Modesto City Schools	M.A.	Purchasing	Invited by District	May 9, 1997	Nov. 19, 1997
102	Solano County Office of Education	M.A.	Transportation	Invited by COE	April 30, 1997	January 27, 1998
101	Mammoth Unified School District	M.A.	Fiscal Review	Invited by District	April 29, 1997	Sept. 22, 1997
100	Waterford Elementary School District	M.A.	District Reorganization	Invited by District	April 25, 1997	October 24, 1997
99	Sausalito Elementary School District	M.A.	Fiscal Review	Invited by District	April 25, 1997	Sept. 17, 1997
98	Hemet Unified School District	M.A.	Transportation	Invited by District	April 24, 1997	Sept. 8, 1997
97	Lone Pine Unified School District	M.A.	Fiscal Review	Invited by District	March 20, 1997	October 15, 1997
96	Butte County Office of Education	M.A.	SELPA	Invited by COE	March 14, 1997	October 10, 1997
95	Vallejo City Unified School District	M.A.	Facilities	Invited by District	March 13, 1997	June 30, 1998
94	Travis Unified School District	M.A.	Bus. Services, Personnel	Invited by District	March 3, 1997	Dec. 1, 1997 April 17, 1998
93	Yosemite High School District	M.A.	Business Services	Invited by District	February 26, 1997	June 30, 1998
92	Sierra Sands Unified School District	M.A.	Fiscal Review	Invited by District	February 12, 1997	May 12, 1997
91	San Dieguito Union High School District	M.A.	Transportation	Invited by District	February 9, 1997	Dec. 12, 1997
90	San Bernardino COE/Chino Unified SD	F.C.	Long-term debt	Assigned by COE	January 31, 1997	June 30, 1997
89	Grant Jt. Union High School District	M.A.	Technology	Invited by District	January 30, 1997	July 7, 1997
88	Compton Unified School District	E..L.	Comprehensive	Assigned by AB 52	January 1, 1998	December 1, 2001
87	Acalanes Union High School District	M.A.	New Business Processes	Invited by District	January 28, 1997	May 6, 1997
86	Somis Union School District	M.A.	Organizational & Staffing	Invited by District	December 13, 1996	April 18, 1997
85	Mill Valley Elementary School District	M.A.	Staffing	Invited by District	November 1, 1996	February 7, 1997 (services only)
84	North Monterey County Unified School District	M.A.	Transportation	Invited by District	November 1, 1996	Dec. 12, 1996
83	Mount Diablo Unified School District	M.A.	Business, Personnel	Invited by District	October 16, 1996	March 14, 1997
82	Contra Costa County Office of Education	M.A.	Business Services	Invited by COE	September 26, 1996	April 25, 1997
81	Dixie Elementary School District	M.A.	Business Services, Staffing	Invited by District	September 5, 1996	March 6, 1997
80	Marin County Office of Education	M.A.	Fiscal Review	Invited by COE	September 4, 1996	August 8, 1997
79	El Dorado County Office of Education	M.A.	Transportation	Invited by COE	June 20, 1996	Dec. 20, 1996 June 30, 1997
78	Marin County Office of Education	M.A.	Alternative Ed/ ROP	Invited by COE	June 19, 1996	January 10, 1997 May 12, 1999
77	Mendocino COE/Point Arena Jt. UHSD-Arena SD	M.A.	Reorganization	Assigned by COE	May 31, 1996	October 29, 1996

Study No.	Education Agency	Study Type	Study Topics	Assigned/Invited by	Date Study Requested	Final Report Issued
76	Lemoore Union High School District	M.A.	Vehicle Maintenance JPA	Invited by District	May 16, 1996	January 2, 1997
75	Nevada COE/Ready Springs Union SD	M.A.	Attendance Accounting	Assigned by COE	May 7, 1996	June 12, 1996
74	Centinela Valley Union High School District	F.E.	Business, Personnel, Facilities, Board Relations	Assigned by FCMAT Board at request of LACOE	April 4, 1996	January 15, 1997
73	Monterey COE/Salinas Union High SD	F.C.	Business Services	Assigned by COE	March 25, 1996	June 11, 1996
72	Fort Sage Unified School District	M.A.	MYP Training	Invited by District	February 6, 1996	Completed (services only)
71	Paso Robles Public Schools	M.A.	Purchasing	Invited by District	March 12, 1996	Sept. 24, 1996
70	Orange COE/Laguna Elementary School District	M.A.	Fiscal Review	Assigned by COE	March 12, 1996	Sept. 12, 1996
69	Calaveras COE/Vallecito UESD	F.C.	SELPA	Invited by COE	February 1, 1996	Sept. 27, 1996
68	Cupertino Union School District	M.A.	Transportation	Invited by District	January 31, 1996	February 19, 1997
67	El Dorado County Office of Education	M.A.	Routing Training	Invited by COE	January 20, 1996	Dec. 20, 1996
66	Panama-Buena Vista Union School District	M.A.	MYP Training	Invited by District	January 19, 1996	March 13, 1996
65	Sonora Union High School District	M.A.	Technology, Budget	Invited by District	January 4, 1996	April 12, 1996
64	Saugus Union School District	M.A.	Transportation	Invited by District	January 3, 1996	May 31, 1996
63	Sonoma County Office of Education	M.A.	SELPA	Invited by COE	December 11, 1995	March 3, 1997
62	Calexico Unified School District	M.A.	Business Services	Invited by District	November 27, 1995	July 12, 1996
61	Visalia Unified School District	M.A.	MYP Training	Invited by District	November 22, 1995	Completed
60	Acalanes Union High School District	M.A.	Business Services	Invited by COE	November 15, 1995	January 30, 1996
59	Santa Cruz County Office of Education	M.A.	Business Services	Invited by COE	November 13, 1995	July 18, 1996
58	Kings County Office of Education	M.A.	MYP Training	Invited by COE	October 27, 1995	December 1, 1995
57	Hemet Unified School District	M.A.	Curr., Bus., Technology	Invited by District	October 9, 1995	June 18, 1996
56	Santa Cruz County Office of Education	M.A.	District Reorganization	Invited by COE	September 22, 1995	October 9, 1995
55	Solano County Office of Education	M.A.	AB 1200 Oversight	Invited by COE	September 11, 1995	Nov. 20, 1995
54	Riverside County Office of Education	M.A.	SELPA	Invited by COE	September 1, 1995	February 2, 1996
53	Madera COE/Minarets JUHSD	M.A.	Reorganization	Assigned by Madera COE	August 25, 1995	April 22, 1996 May 19, 1997
52	Fort Sage Unified School District	M.A.	Fiscal Review	Invited by District	August 18, 1995	October 18, 1995
51	Novato Unified School District	M.A.	Food Services	Invited by District	July 10, 1995	Sept. 15, 1995
50	San Luis Obispo County Superintendent of Schools	M.A.	Business Services	Invited by COE	June 29, 1995	December 15, 1995
49	South Bay Union Elementary School District	M.A.	Technology	Invited by District	June 26, 1995	October. 13, 1995
48	San Jose Unified School District	M.A.	Organizational & Staffing	Invited by District	May 8, 1995	Sept. 15, 1995
47	Riverside County Office of Education	M.A.	District Reorganization	Invited by COE	May 8, 1995	March 25, 1996
46	Corning Union Elementary School District	M.A.	Organizational & Staffing	Invited by District	May 8, 1995	October 4, 1995
45	Mesa & Somis Union Elementary School Districts	M.A.	Transportation	Invited by Districts	May 5, 1995	July 20, 1995
44	Susanville Elementary School District	F.C.	Fiscal Review	Assigned by Lassen COE	May 4, 1995	July 21, 1995
43	Lemoore Union High School District	M.A.	Budget Development	Invited by District	April 19, 1995	June 28, 1996
42	West Fresno Elementary School District	F.C.	Fiscal Review	Assigned by Fresno COE	March 15, 1995	July 5, 1995
41	Mendota Unified School District	F.C.	Fiscal Review	Assigned by Fresno COE	March 15, 1995	July 6, 1995
40	Lemoore Union High School District	M.A.	Transportation	Invited by District	February 7, 1995	December 4, 1995
39	San Luis Obispo County Superintendent of Schools	M.A.	Transportation	Invited by COE	February 3, 1995	April 6, 1995
38	Sutter County Office of Education	M.A.	AB 1200 Oversight	Invited by COE	January 23, 1995	June 8, 1995
37	Shasta County Office of Education	M.A.	Classification Study	Invited by COE	January 23, 1995	Nov. 17, 1995
36	Firebaugh-Las Deltas Unified School District	M.A.	Transportation	Invited by District	January 21, 1995	May 11, 1995
35	Calaveras COE/Vallecito Union Elementary SD	F.C.	Long-term debt	Assigned by COE	December 15, 1994	April 3, 1995
34	Atwater Elementary School District	M.A.	Fiscal Review	Invited by District	December 14, 1994	April 7, 1995
33	Mojave Unified School District	M.A.	Transportation	Invited by District	December 7, 1994	March 3, 1995
32	Madera County Office of Education	M.A.	District Reorganization	Invited by COE	October 27, 1994	June 22, 1995
31	Standard Elementary School District	M.A.	Organizational & Staffing	Invited by District	October 24, 1994	Nov. 21, 1994
30	Amador County Unified School District	M.A.	Business Services	Invited by District	October 21, 1994	March 15, 1995
29	Gateway Unified School District	M.A.	Transportation	Invited by District	October 14, 1994	February 27, 1995

Study No.	Education Agency	Study Type	Study Topics	Assigned/Invited by	Date Study Requested	Final Report Issued
28	Tehama County Office of Education	M.A.	AB 1200 Oversight	Invited by COE	July 27, 1994	Nov. 15, 1994
27	Sacramento City Unified School District	M.A.	Fiscal Review	Invited by District	July 5, 1994	Dec. 6, 1994
26	Santa Clara County Office of Education	M.A.	Organizational & Staffing	Invited by COE	May 11, 1994	February 1, 1995
25	Sonora Union High School District	M.A.	Business Services	Invited by District	May 6, 1994	August 18, 1994
24	Red Bluff Union Elementary School District	M.A.	Business Services	Invited by District	May 2, 1994	August 23, 1994
23	LaHonda-Pescadero Unified School District	F.C.	Fiscal Review	Invited by COE	April 13, 1994	June 8, 1994
22	Raymond-Knowles Union School District	M.A.	Fiscal Review	Invited by District	March 25, 1994	July 27, 1994
21	Mark Twain Union Elementary School District	M.A.	Budget Development	Invited by District	March 23, 1994	August 16, 1994
20	Sacramento City Unified School District	M.A.	Organizational & Staffing	Invited by District	February 9, 1994	July 5, 1994
19	Shoreline Unified School District	M.A.	Budget Development	Invited by District	January 27, 1994	March 14, 1994
18	Calaveras County Office of Education	M.A.	Business Services	Invited by COE	January 21, 1994	April 14, 1994
17	Sweetwater Union High School District	M.A.	Transportation	Invited by District	December 10, 1993	February 14, 1994
16	Shasta County Office of Education	M.A.	Technology	Invited by COE	November 8, 1993	Dec. 19, 1993
15	Dos Palos-Oro Loma Unified School District	M.A.	Fiscal Review	Invited by District	November 4, 1993	April 13, 1994
14	Eureka City Schools	F.C.	Fiscal Review	Assigned by COE	November 1, 1993	Dec. 21, 1993
13	San Lorenzo Valley Unified School District	M.A.	Fiscal Review	Invited by District	August 23, 1993	Sept. 15, 1993
12	Paso Robles Public Schools	M.A.	Transportation	Invited by District	July 19, 1993	October 26, 1993 Dec. 13, 1993
11	Mendocino County Office of Education	F.C.	Fiscal Review	Assigned by CDE	July 16, 1993	January 7, 1994
10	Modesto City Schools	M.A.	Technology	Invited by District	May 18, 1993	Sept. 7, 1993
9	Sonoma COE/Bennett Valley Union Elementary SD	F.C.	Budget Development	Assigned by COE	May 6, 1993	June 4, 1993
8	Sutter County Office of Education	M.A.	Business Services	Invited by COE	Mar. 23, 1993	June 21, 1993
7	Plumas Unified School District	F.C.	Fiscal Review	Invited by District	February 3, 1993	May 28, 1993
6	Pajaro Valley Unified School District	F.C.	Budget Development	Invited by District	January 21, 1993	April 7, 1993 May 20, 1993
5	Reef-Sunset Unified School District	F.C.	Financial Projection	Assigned by Kings COE	January 8, 1993	June 18, 1993
4	Val Verde Unified School District	M.A.	Organizational & Staffing	Invited by District	December 15, 1992	February 9, 1993
3	Visalia Unified School District	F.C.	Fiscal Review	Assigned by Tulare COE	December 14, 1992	March 26, 1993
2	Butte Valley Unified School District	M.A.	Attendance Accounting	Invited by District	October 19, 1992	Nov. 18, 1992
1	Hayward Unified School District	F.C.	Fiscal Review	Invited by Dist & COE	July 30, 1992	Nov. 13, 1992



## Appendix B

# Professional Development

## 2006-07 Project/Product List

### Training/Workshops

#### **Project: Accounts Payable Workshop**

*Target Audience:* Chief business officials, county office and district business staff

*Description:* Participants will receive information to help them understand the complexities that govern many of the internal procedures that exist in accounts payable. They will learn the importance of accounts payable as it relates to budget, overall financial reporting, federal and state categorical compliance, and the annual audit of district funds. Each participant will receive comprehensive materials that will include a copy of the California School Accounting Manual.

#### **Project: Pupil Attendance for School Site & District Personnel**

*Target Audience:* Chief business officials, business office staff, site level staff

*Partners:* California Association of School Business Officials (CASBO), Business and Administration Steering Committee (BASC), County Offices of Education

*Description:* FCMAT supports CASBO's attendance workshops and recently funded the revision of the "World of Attendance Accounting" manual. The project offers the attendance accounting training on a regional basis in several of California's county offices of education. Participants will understand the need to evaluate their attendance record-keeping procedures to ensure they are in compliance and are maximizing ADA.

#### **Project: Associated Student Body Accounting: Ensuring Financial Integrity**

*Target Audience:* Chief business officials, site administrators and staff, other business office staff, school leadership team members

*Description:* The workshop will provide pertinent information and valuable instruction to the participants on ASB fund accounting. Each workshop will cover the following subject areas during a six-hour training period.

- a. Introduction to ASB accounting
- b. State requirements and regulations
- c. ASB audit exceptions and problem areas
- d. Examples of accounting records and procedures
- e. Income control and cash receipts
- f. Disbursements
- g. Internal control

**Project: The Audit Challenge: Minimizing the Pain, Maximizing the Benefits**

*Target Audience:* Chief business officials, county office and district business staff, superintendents, board members, internal auditors

*Description:* This workshop has as its major focus state and federal compliance requirements that are subject to annual change, resolution of audit findings, building a system of good internal controls, internal audits and fraud audits. Participants will also receive information on audit administration, including how to select external auditors and manage audit activities.

**Project: SACS – The Standard Account Code Structure Basics**

*Description:* This half-day workshop, co-sponsored by FCMAT, California Debt & Investment Advisory Commission and CASBO, is designed to assist business office staff in the details of implementing SACS. It offers an introduction to school accounting and the use of the Standardized Account Code Structure. It covers the components of the standardized structure, valid account combinations, changes to the California School Accounting Manual (CSAM), an examination of accounting issues unique to schools and common problems and how to avoid them.

**Project: SACS – Advanced Topics, Hot Topics and Cool Tools**

*Description:* This full-day workshop is co-sponsored by FCMAT, California Debt & Investment Advisory Commission and CASBO. It is designed for those who are already familiar with SACS and prepare, analyze or communicate accounting information used in management and decision making.

**Project: Budget Explorer Training**

*Target Audience:* Chief business officials, other business office staff

*Description:* The training provides attendees with an in-depth understanding of Budget Explorer as a multiyear financial forecasting, planning, and communication tool. Each training session covers the following subject areas during a three-hour training period.

- a. Introduction to multiyear financial forecasting
- b. Creating a multiyear financial forecast
- c. Working with projection rules and assumptions
- d. Working with projected enrollment, ADA, and teacher staffing data
- e. Creating multiyear salary forecasts
- f. Fine-tuning the revenue limit calculation
- g. Printing reports
- h. Exporting data to Excel or PDF
- i. Documenting your protection
- j. Using Budget Explorer as a planning tool
- k. Using Budget Explorer to create Board Reports

**Project: CBO Boot Camp**

*Target Audience:* Veteran and aspiring chief business officials, superintendents, site principals and staff

*Partner:* CASBO

*Description:* This is an intensive, three-and-a-half-day program designed to assist aspiring chief business officials and superintendents. This unique program will guide participants through the everyday battles and sometimes conflicting responsibilities that CBOs must deal with. Practicing experts are utilized to present in each area. Areas of focus include overview of school finance, making budget presentations, special education issues, SACS accounting structures, working with oversight agencies, school facilities, risk management, the CBO and collective bargaining, and much more. Participants will have a very hands-on experience and will receive information that can be immediately utilized in their school or district.

**Project: Beyond Boot Camp**

*Partner:* CASBO

*Description:* This one and a half day program builds on the basics provided in the highly acclaimed CBO Boot Camp program by focusing on the myriad of legal issues that confront CBOs daily. Presented by the top practitioners in the field, participants are offered key strategies in areas ranging from liability to special education law, as well as model documents and case studies of legal challenges faced by other CBOs.

**Project: Managing Charter Schools – New Rules, New Challenges**

*Target Audience:* District and county administrators and staff, charter school staff, attorneys and other legal staff, board members and other policy makers

*Description:* Co-sponsored by SSC and FCMAT. Recently enacted legislation subjects school agencies to a higher level of liability than before. This same legislation requires school agencies to increase their oversight of charter schools, and also reduces the amount they can charge as oversight fees. This workshop will help school agencies understand how to actively oversee existing charter schools, evaluate and improve proposals for new and renewal charter schools and respond to requests for facilities from both existing and proposed charter schools.

**Project: Community College Chief Financial Officer Institute**

*Target Audience:* Community college CFOs and business office staff

*Partners:* Association of Community College Business Officials (ACBO)

*Description:* The Community College Chief Financial Officer Institute provides an ongoing opportunity for college CFOs and other business office personnel to come together during four separate training sessions throughout the year to receive instruction, information and training on a variety of topics related business office operations. Presentations are provided by both public and private sector individuals and organizations and cover topics ranging from generally accepted accounting practices to facilities financing and monitoring, and other business functions.

### **Project: Debt Financing Training**

*Target Audience:* Chief business officials, superintendents, board members, business office staff

*Partner:* Governmental Financial Strategies

*Description:* The workshop is intended to provide an in-depth overview of public debt financing, including all varieties of bond sales and their considerations. The curriculum for this program was co-developed by FCMAT and Governmental Financial Strategies Inc. The program is a full eight hours and focuses on decision-making teams representing each entity.

### **Project: Evaluating Special Education Expenditures**

*Target Audience:* District and county special education administration and staff, SELPA administration and staff, other site and district administrators, superintendents

*Description:* Under the AB 602 special education finance model, opportunities to reduce special education encroachment have shifted from revenue maximization to expenditure controls. This workshop provides participants with clear benchmarks for evaluating their own special education programs focusing specifically on cost containment and expenditure control.

### **Project: Fiscal Oversight Conference**

*Target Audience:* County office business staff

*Partners:* California County Superintendent Educational Services Association (CCSESA); Business and Administration Steering Committee (BASC)

*Description:* This is an annual event co-sponsored by CCSESA, BASC and FCMAT to provide up to date information and training related to the role of the county office of education as cited in Education Code Sections 42127.6-8. Sessions relate to emerging oversight issues, new legislations, the utilization of tools and techniques and general information sharing related to the implementation of AB 1200 and AB 2456. Presentations are offered by both public and private sector individuals including representatives from the California Department of Education.

### **Project: Building a Better Budget - Making Categoricals Serve Your District • Optimal Program Implementation (OPI) for Principals and District Administrators**

*Target Audience:* Principals and district administrators, school leadership team members

*Description:* With the innumerable new state programs and complex continuing initiatives, it has become increasingly difficult for the administrator to effectively implement the program at the site level and make wise resource allocation decisions. This workshop provides a framework for use in program design and optimal implementation. Optimal Program Implementation of state budget allocations for new and highly visible continuing programs will be discussed. Among those are: Public School Accountability; High School Exit Examination; Class Size Reduction; Remedial Summer School; Peer Review; and others.

**Project: The Money and Muscle of Facilities Maintenance**

*Target Audience:* Chief Business Officials, county office and district business staff, Superintendents, Board Members, construction management staff

*Description:* With increasing interest in the Legislature and other governmental agencies in fully funding deferred maintenance and other facility related issues, school districts and county offices of education need accurate inventories of their facilities and a specific process to document receipt and expenditure of state funds. This workshop focuses on creating a financial accounting system that meets the needs of facilities planning for the district's governing board, administration and staff. The workshop includes information related to estimating and containing building costs, working with the Office of Public School Construction (OPSC), building a capital facilities budget, avoiding errors on the SAB 184's, and a range of other topics.

**Project: Conquering District Budgets in these Tough Times**

*Description:* Co-sponsored by SSC and FCMAT. With the current state of the economy and the state budget, grappling with the district's budget is more challenging than ever for school district administrators and the entire management team. This workshop provides hints, tips and methods for budget analysis, budget reductions and budget communications.

**Project: Best Practices—Purchasing**

*Target Audience:* District and county office CBOs and purchasing staff

*Partner:* California County Superintendent Educational Services Association (CCESSA)

*Description:* The Best Practices - Purchasing workshop is intended to assist and inform business office employees regarding all aspects of procurement, bidding, and contracting for products and services in the education industry environment. The curriculum is co-developed by CCSESA, BASC and FCMAT. The presentation is seven hours long and focuses on the latest research and development in purchasing.

**Project: Risky Business – Technology Use and Abuse**

*Target Audience:* School board members, superintendents, administrators, CBOs, HR staff, technology staff, instructional staff, first responders

*Description:* This one-day workshop on computer use and abuse touches on a variety of business, HR, risk management, and liability reduction issues. This is not a "techie" conference! How should you respond if a member of your staff is accused of accessing inappropriate content? What should you do if an employee discipline matter suddenly becomes a criminal issue such when child pornography is involved? This workshop is intended to help participants learn to respond to their next computer crisis and protect against the continued occurrence of technology related issues.

## Products and Services

### **Project: Business Services Guide**

*Target Audience:* Chief business officials, county office and district business staff, superintendents, board members

*Description:* The San Diego COE provides the rights to publish and disseminate (electronically and otherwise) the Business Services Guide. The guide is a compendium of business related information, processes and guidelines developed to support chief business officials and all other business related staff and administration.

### **Project: Certificated Salaries and Benefits Project, J-90**

*Target Audience:* Chief business officials, county office and district business staff, superintendents, negotiations staff

*Description:* School Services of California, together with the California Department of Education, the California Federation of Teachers and the California Teachers Association, designs a survey form to collect and publish salary and benefits information for certificated employees. Improvements are continually made to enhance the quality of district information. SSC and the partners perform a series of steps following the data entry for all school districts. Issues to be evaluated and reported include average salary schedule amount and total salary expense - prior vs. current year; total health benefit expense as a ratio to total salary expense; total number of service days versus instructional days; and other appropriate and timely data. This is an annual, ongoing publication.

### **Project: Ed-JOIN**

*Target Audience:* Beginning teachers, school districts, human resources professionals

*Partner:* California County Superintendents Educational Services Association (CCSESA)

*Description:* Ed-JOIN is California's premier public education job search web site. Created by the California County Superintendents Educational Services Association and supported by CalTRIP, Ed-JOIN offers a unique tool for school districts and county offices of education to utilize in their efforts to recruit quality staff. This project partners FCMAT and the Ed-JOIN staff to train school district HR professionals in the use of the Ed-JOIN product.

### **Project: Fiscal Oversight Guide**

*Target Audience:* County office and district CBOs, superintendents, and business staff.

*Description:* The Fiscal Oversight Guide outlines the responsibilities of the county offices of education in the budget adoption and approval process, and review of interim reports. Guidance and sample letters are provided for various budget scenarios.

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## **Project: Masters in Governance • Revision of the Finance Module**

*Target Audience:* Board members, superintendents

*Partner:* California School Boards Association (CSBA)

*Description:* The California School Boards Association has developed the Masters of Governance training program to support board members and superintendents. The program contains seven separate training modules focusing on the board's role with respect to setting the direction, establishing structure, providing support, ensuring accountability and acting as community leaders. FCMAT is supporting CSBA in the revision of the finance module in an effort to better prepare board members for their important role in approving, monitoring and implementing the district budget.

## **Project: Procedures Manual—County Offices of Education**

*Target Audience:* County office CBOs, business office staff

*Partner:* Alameda County Office of Education, other county offices of education, BASC

*Description:* This FCMAT project funds the development of a procedures manual for county offices of education. There have been broad variations in the processes county offices utilize in the area of AB 1200 oversight and other particular services. This manual/desk reference provides guidelines and documents the legally required services and oversight that county offices of education provide to the school districts and other entities within the county.

## **Project: Resource Guide • Conferences, Workshops and Training Opportunities for District and County Business Office Staff**

*Target Audience:* Chief business officials, county office and district business staff

*Description:* With the enactment of AB 3141, state-funded school business training services are being facilitated through FCMAT, which operates through the Kern County Superintendent of Schools office. A requirement of AB 3141 is the development of a training calendar, to be disseminated semiannually to each county service region, that publicizes all of the fiscal training services that are being offered at the local, regional and state level. The Resource Guide is posted on the FCMAT web site.

## **Project: User Friendly Budget Training**

*Target Audience:* CBOs, business office staff, other central office administrators

*Partners:* Girard Foundation, FCMAT

*Description:* FCMAT emphasizes the importance of developing policy-focused, user-friendly budget displays for school districts and county offices. With financial support from the Girard Foundation and the involvement of a variety of other agencies, we designed a CD ROM program with accompanying instructions for use by school districts and county offices in displaying budgets in a user-friendly format. A training effort and development of a help desk will accompany the free distribution of the CD ROM.

## Project: CBO Mentor Project

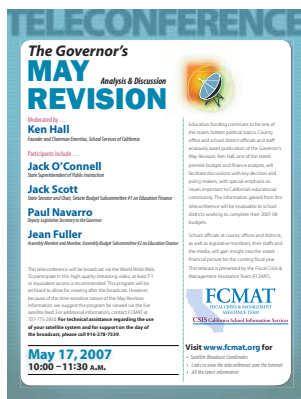
*Description:* The CBO Mentor Project is a one-year program designed to produce qualified district CBOs. It consists of classroom training taking place in eight one-and-a-half-day sessions. In addition, each participant will be assigned a Mentor, who is an experienced CBO and will be available to help the participant as needed. The application process takes place in December for the following year’s program. The program is scheduled to begin in April and conclude in March of the following year. The project is a partnership between CASBO, CCSESA, BASC and FCMAT.

## Project: Regional Teams – Cooperative Ventures With FCMAT

*Target Audience:* Regional staff at district and county office level

*Description:* FCMAT works in cooperation with the regional teams located in regions 1, 4, 9 and 10 to help provide a variety of different local training opportunities to staff who reside in those regions. Regional team and FCMAT resources combine to offer low cost, high quality professional development that does not require travel outside the region. Existing partners such as CASBO, School Services of California and others help bring training to the regions.

## Teleconferencing



## Project: May Revision Teleconference

*Target Audience:* County and district business officials, all administrators, board members, school leadership team members, news media, elected officials

*Presenter:* Ken Hall, School Services of California

*Description:* Each year, the Governor publishes the May Revision of the annual state budget. For school district and county office staff, administration and boards, this revision is a critical indicator that affects budget development, organizational planning, and employee agreements. The May Revision Teleconference provides an analysis and discussion

of this important budget document immediately upon its release.

## Project: Legislative Analyst Office Analysis of the Governor’s Budget

*Presenter:* Ken Hall, School Services of California

*Target Audience:* County and district business officials, all administrators, board members, school leadership team members, news media, elected officials

*Description:* In February, Legislative Analyst Elizabeth Hill prepared the LAO’s analysis of the Governor’s budget. This teleconference featured Ms. Hill in a conversation with legislators and educators regarding the fiscal health of the state and the potential impact of future policy decisions on California’s education system.

## **Appendix C**

### **FCMAT Governing Board Meeting Minutes for 2006-07**

1. October 15, 2006
2. January 24, 2007
3. March 22, 2007
4. June 24, 2007 (Unadopted)



**FISCAL CRISIS AND MANAGEMENT ASSISTANCE TEAM  
 BOARD OF DIRECTORS' QUARTERLY MEETING  
 Ironstone Vineyards, Murphys  
 October 15, 2006  
 Minutes**

**Present:**

Herbert Fischer, San Bernardino COE, Chair ..... RIMS, Region 10  
 Jay N. Hoffman, Nuvview USD..... RIMS, Region 10  
 Paul Tichinin, Mendocino COE..... North Coast, Region 1  
 Richard Holmes, Siskiyou UHSD .....Northeastern, Region 2  
 Terence McAteer, Nevada COE ..... Capitol, Region 3  
 Sherry Smith, El Dorado UHSD ..... Capitol, Region 3  
 Mary Jane Burke, Marin COE ..... Bay, Region 4  
 Sheila Jordan, Alameda COE, Alternate ..... Bay, Region 4  
 Tim Foley, San Benito COE, Vice Chair..... South Bay, Region 5  
 Marc Liebman, Berryessa USD ..... South Bay, Region 5  
 Michael Carey, Amador COE ..... Delta Sierra, Region 6  
 Bill Draa, Banta ESD..... Delta Sierra, Region 6  
 Patrick J. Holland, Mariposa COE ..... Central Valley, Region 7  
 David Miller, Hilmar Unified SD ..... Central Valley, Region 7  
 Julian Crocker, San Luis Obispo COE, Past Chair..... Costa Del Sur, Region 8  
 Amy Enomoto-Perez, Rosemead SD..... Los Angeles, Region 11  
 Darline Robles, Los Angeles COE ..... Los Angeles, Region 11  
 Frederick Harris..... Vice Chancellor, Community Colleges  
 Susie Lange ..... Deputy Superintendent, CDE  
 Erik Skinner ..... Office of Secretary of Education  
 Joel Montero ..... Chief Executive Officer, FCMAT

**Guests and Staff:**

Russ Brawn .....Chief Operations Officer, CSIS  
 Nancy Sullivan ..... Administrator, CSIS  
 Frank Fekete ..... Legal Counsel, FCMAT  
 Christine Frazier..... Associate Superintendent, KCSOS  
 Anthony Bridges..... Deputy Executive Officer, FCMAT  
 Barbara Dean ..... Deputy Administrative Officer, FCMAT  
 Roberta Mayor..... Chief Management Analyst, FCMAT  
 Barbara Smith ..... Executive Secretary, FCMAT  
 Linda Protine ..... BASC Chair  
 Kermith Walters.....Siskiyou COE  
 Michael Ricketts..... CCSESA  
 Sue Burr ..... CCSESA  
 Gary Thomas ..... San Bernardino COE  
 David Long ..... Riverside COE

**Excused:**

Open..... North Coast, Region 1  
 Bob Owens, Lassen COE ..... Northeastern, Region 2  
 Laura Alvarenga, San Rafael City HSD ..... Bay, Region 4  
 Patrick Sayne, Paso Robles USD ..... Costa Del Sur, Region 8  
 Bill Habermehl, Orange COE ..... Southern, Region 9  
 Open..... Southern, Region 9  
 Don Singer..... San Bernardino Community College District  
 Larry Reider..... Administrative Agent, FCMAT

## **I. General Functions**

### **A. Call to Order**

The meeting of the FCMAT Board of Directors was called to order at 10:35 a.m. by Vice Chair Tim Foley, San Benito County Superintendent of Schools.

### **B. Approval of Agenda**

A motion was made by Bill Draa and seconded by Richard Holmes to approve the October 15, 2006 agenda. The motion was approved.

### **C. Minutes of June 25, 2006**

A motion was made by Jay Hoffman and seconded by Marc Liebman to approve the minutes of the June 25, 2006 board meeting. The motion was approved.

### **D. Welcome from FCMAT's Administrative Agent**

Christine Frazier reported that Dr. Reider was in London on business for MOVE International. She welcomed the board and thanked Region 6 for hosting the CCSESA quarterly meetings. Chris introduced the new board member, Sherry Smith from El Dorado Union High School District, Region 3. Sherry is replacing Molly Helms. Laura Alvarenga from San Rafael City High School District, Region 4 who is replacing John Sugiyama was not present. Visitors were introduced: Kermith Walters, the new superintendent at Siskiyou County Office of Education, and Sue Burr and Michael Ricketts from CCSESA. Sue and Michael will begin their new positions November 1, 2006.

### **E. FCMAT Executive Committee Meeting**

Joel reported that the Executive Committee approved the hiring of six new positions for CSIS. CSIS continues to grow with additional responsibilities. The Executive Committee can expect to be asked to approve more new positions before the next board meeting.

### **F. Public Participation**

There were no public comments.

### **G. Report from the California Department of Education**

Susie Lange reported that a committee has been formed to decide how to spend the \$3 billion received in the recent Proposition 98 settlement. The legislation is descriptive but not clear about how the money is to be spent over the next seven years.

Susie stated that the department has sent out an annual letter which is posted on their web site. New funding is available for the before and after school programs. The annual letter addresses how the programs will work. Sue Stickel accepted a position with the Sacramento County Office of Education. Susie encouraged people to apply for Sue's vacant position.

Susie reported that the department is pleased with the progress in Oakland USD. Kimberly Statham has been selected as the new state administrator replacing Randy Ward. Kim has a lot of curriculum experience and has very strong leadership skills. Susie also reported that the department will hold four hearings to receive feedback and recommendations regarding the reauthorization of the No Child Left Behind (NCLB) Act.

### **H. Report from Secretary of Education or Designee**

Erik Skinner reported that the Office of the Secretary of Education is reviewing the legislation enacted and looking to advise the governor on the budget for next year. This year there is a tremendous amount

of new resources. There were significant new initiatives and the Secretary's Office will be closely watching the implementation of new funds for before and after school programs, music programs and the new initiative for middle and high school counselors. The settlement of Proposition 98 presents a great opportunity to begin working with the counties.

Erik reported that CALPADS is making great progress and additional funding has been received for FCMAT/CSIS for CALPADS to assist in preparing student identifiers. GASB 45 is another opportunity to address the unfunded liability of health benefits.

Marc Liebman shared his concern about the fairness of the settlement reached and indicated that his schools are not receiving any part of the settlement funds. Erik responded that the funds have been directed to address the areas of greatest need. Terry McAteer shared his disappointment that none of his schools are eligible to receive funding for before and after school programs. Mary Jane Burke commented that this will continue to be a global conversation and that there has to be some priorities set based not on what we want, but on what we need. It will continue to be a struggle, but we have to keep moving forward because there is a lot more to do.

## **I. Reorganization of FCMAT – Roles & Responsibilities**

Joel reported that he has been working to organize his management team since he became Chief Executive Officer on March 1. He invited the FCMAT management team to attend today's meeting.

Joel introduced Anthony Bridges, the Deputy Executive Officer, who is responsible for the day to day operations in the field. He is also responsible for new product development. In addition to these responsibilities, each team member maintains a case load and they are all working at districts in the field.

Joel introduced Barbara Dean, the Deputy Administrative Officer. As of July 1, all financial aspects of FCMAT Management Assistance are under Barbara's supervision. Tamie Triplett, FCMAT's accountant, is now working solely with CSIS accounts and budgets. Barbara also is the deployment officer and makes the first contact on any new study requests from districts and county offices.

Roberta Mayor, Chief Management Analyst is the coordinator of special projects, community colleges and comprehensive studies. She is the report editor and reviews every report before it goes to the client. FCMAT is working to improve the quality and the timeliness of our reports.

Russ Brawn, the Chief Operations Officer of CSIS, is responsible for the day to day operations of the CSIS office and his responsibilities continue to increase with the added workload for CSIS.

Nancy Sullivan is the Administrator of Special Projects for CSIS. Nancy has worked for the California Department of Education and is second in command under Russ Brawn. She is responsible for instructional outreach and governmental relations.

Frank Fekete, FCMAT's attorney, has been invaluable during the Opportunities for Learning and Options for Youth Charter School audit.

Currently, FCMAT has a vacancy for another Chief Management Analyst position, which hopefully will be filled by the next board meeting.

Recently, FCMAT opened three new positions for a Fiscal Intervention Specialist. This position was created to make the organization more competitive with district CBO positions and to provide an opportunity for promotion within the agency. In addition, we have three writers who are supervised by Roberta. Joel shared that the current organizational structure helps him and makes the agency more efficient. Joel thanked Chris Frazier, the KCSOS Associate Superintendent who supervises FCMAT, for her support in the organizational changes.

Amy Enomoto-Perez asked if FCMAT could provide the board with an organizational chart of FCMAT and CSIS. Julian Crocker asked that the organizational chart include existing staff and the number of posi-

tions of Management Analysts and Fiscal Intervention Specialists. He also inquired about the use of consultants. Joel indicated that at the next board meeting he will provide information about the number of consultants and how they are used.

Tim Foley turned the meeting over to the Chair, Herbert Fischer, who thanked Tim for chairing the meeting as his arrival was delayed.

## **J. Financial Report**

Joel reported that at the last board meeting he discussed FCMAT's fiscal health. For the last few years FCMAT has been deficit spending, and it is FCMAT's goal to be more fiscally responsible and move to a cost containment mode. Since July 1, Barbara Dean has modified the FCMAT financial procedures and has worked hard in getting the management assistance billings up to date. Section J of the board packet provides the new format for budget analysis.

Barbara Dean reviewed the Section J budget documents with the board. She explained that as FCMAT receives revenue, the reports will be revised. Joel reported that FCMAT is required to set aside a reserve of 25-50% of its budget for emergency loans. This amount is reflected in the budget report. Joel stated that Barbara will make the budget presentation at each October board meeting.

## **K. Professional Development Calendar**

Joel reported that annually the board approves the Professional Development Calendar. An annual schedule of the partners and timeline for Professional Development was provided in the board packet. Some of the partners are new this year.

Susie Lange commented that the bill for the CBO Trainings was late and they were unable to use the funds for this project. They will not be able to accommodate any more applications for the second year, but will continue to accept applications and put them on a waiting list. CASBO worked with the legislature to get the bill passed. The program has been very well received.

Joel suggested that the board visit the Ed Data web site. The site has been updated and is now in SACS format. He also reported that BASC is sponsoring a County Office Fiscal Oversight workshop in Ontario on October 25. Board members are welcome to attend. They can contact the FCMAT office for more information.

Joel reported that in addition to the Professional Development Calendar, FCMAT is developing new products. One of the new products is the on-line Budget Explorer software. Anthony Bridges reported that the second version of the Budget Explorer software has been released, and the first training on the software was provided for the CBO Mentor Project and it went very well. Training on the software can be arranged through the county offices and are timely now because they can be provided in connection with the first interim reports. The second version of the Budget Explorer software is for K-12 districts but a third version will be available for county offices and community colleges. These projects are funded through FCMAT's Professional Development budget.

Also in development is the new Fiscal Insight software. This software will upload any type of financial data (e.g. cash flow, revenue) from a district. It will be piloted in several districts that are under state receivership.

A motion was made by Terry McAteer and seconded by Patrick Holland to approve the Professional Development Calendar for 2006-07. The motion was approved.

## **L. CSIS First Quarter Report/Data Dictionary Changes**

Nancy Sullivan reported that CSIS is getting ready for the CBEDS fall submission. There is a relatively short window for the submission and CSIS is trying to get the word out on the requirements. CSIS received additional funding and it will be used to purchase a high level server that will assist in the communication with the county offices, districts and charters.

The charter schools continue to struggle in the assignment of the student identifiers. A survey has been sent to the charters with information on how to submit the data. Also the LEAs that need additional assistance have been identified.

The reports available to the CSIS client have some new features. Student drop-out data is now available. Also the enrollment summary and the census reports have information if the drop-out student is enrolled somewhere else. The report will also show duplicate enrollments, so that two districts cannot claim the same student. There are a number of LEAs submitting data and reviewing the quality of their reports.

Open Data Gate for Information Day is October 4. Last year there was a struggle in meeting the exit date. Submissions should be received by November 16 and Nancy asked the board for their assistance in sharing this information. She also asked that board members check with their districts and refer them to CSIS if they are struggling and need some support. CSIS will start posting the status on the web site for county offices to see the status of their districts.

A motion was made by Amy Enomoto-Perez and seconded by Fred Harris to approve the changes to the Data Dictionary. The motion was approved.

#### **M. Acceptance of FCMAT's Annual Report**

Joel reported that the Annual Report was modified, making it a briefer document and more appropriate for review. The Foreword has been rewritten to reflect the current changes in FCMAT. FCMAT is looking forward to a very healthy year and we appreciate the continued support of the board. This report is distributed to our regular mailing list.

Terry McAteer thanked FCMAT on behalf of his region for their assistance in Sierra County.

A motion was made by Jay Hoffman and seconded by Dave Miller to accept the Annual Report. The motion was approved.

#### **N. Fiscal Oversight Guide**

Joel reported that this document was formally known as the AB 1200 guide. The document has been expanded to include AB 2756 and the fiscal oversight responsibilities of the county offices. FCMAT has started to use the Business and Administrative Steering Committee (BASC) as a forum and they have assisted in the review of this document. The board is the first to receive this new document and it will be distributed at the COE Oversight Workshop on October 25. It will also be available on the FCMAT web site. There was a request to put it on a CD-ROM. Joel thanked Linda Protine, chair of BASC and Debbie Simons for their assistance.

#### **O. OFL/OFY Lawsuit Dismissal of FCMAT**

Frank Fekete reported that the OFL/OFY lawsuit originally included the five county superintendents in which the charters resided, FCMAT, the CDE, the state controller and the State Board of Education. The county superintendents were dismissed from the lawsuit a while ago and now FCMAT has been dismissed from this lawsuit. Frank anticipates it could be a while before the lawsuit is heard. The Audit Appeals board also has been approached to review the issue of the teacher FTE's claimed by the charter schools. There is also the possibility that the lawsuit will be settled out of court and that there would be no resolution to the issue in question.

#### **P. Status of Key FCMAT Assignments**

Roberta Mayor reported that the state budget act provided authority for FCMAT to use its own unexpended funds to continue three annual progress reports for Vallejo, West Fresno and Oakland. FCMAT teams will be in Vallejo in October and November and the report will be issued in December. At the request of the state administrator at West Fresno, FCMAT will not conduct a review there until spring 2007.

An Oakland progress report was issued on September 30, 2006, one year since the last FCMAT report. Oakland has sustained the improvement it made earlier in the area of Community Relations and Governance, but there were no additional operational areas recommended for return to local control. Roberta reported that the Oakland board members are greatly frustrated and are not supportive of the process. They don't believe that the staff is putting forth their best efforts to meet the criteria for the return to local governance. The board inquired about the cost of another review, and voiced their opinion that six-month reviews might be more productive than annual reviews.

Joel reported that the report on the Albor Charter School should be issued in October or November. This study was requested by the Orange County Office of Education. The Albor Charter School is currently out of business and is no longer functioning as a charter.

Roberta reported that FCMAT continues to be involved in Compton Unified School District because of the ACLU Consent Decree. The ACLU has discussed with FCMAT and the district, alternative criteria for a possible early termination of the Consent Decree. The only area that has not been met under the original Consent Decree is the full implementation of the facilities master plan, which may take years to complete. The latest six month August 2006 report is being held until the court approves the alternative criteria, and the report will be issued in a new format.

AB 318 (Dymally) authorized an AB 139 fraud audit and a comprehensive study of Compton Community College. The fieldwork for the AB 139 fraud audit has been completed and the initial report has been received from the auditors. The FCMAT report will be issued to the college soon.

Teams will be conducting their field work for the comprehensive review of the college in November and December. The comprehensive report will be issued at the end of January and will cover the five operational areas of Community Relations and Governance, Academic Achievement, and Personnel, Facilities and Financial Management.

#### **Q. Monthly Review Newsletter**

Joel reported that a FCMAT monthly newsletter was recently developed to keep the board members better informed and provide them with timely information. Submission for articles is the 15th of each month. Board members can submit information if they are interested. The information can be provided to the FCMAT staff for inclusion.

#### **II. Board Members' Comments**

There were no comments from the board.

#### **III. Agenda Items for Next Meeting**

There were no suggestions for agenda items.

#### **IV. Date and Location of Next Meeting**

The next meeting is scheduled for Wednesday, January 24, 2007 from 10:00 – 12:00 at the Hyatt Regency in Monterey.

#### **V. Adjournment**

The meeting was adjourned at 1:35 p.m.

**FISCAL CRISIS AND MANAGEMENT ASSISTANCE TEAM  
 BOARD OF DIRECTORS' QUARTERLY MEETING  
 Hyatt Regency, Monterey  
 January 24, 2007  
 Minutes**

**Present:**

Herbert Fischer, San Bernardino COE, Chair ..... RIMS, Region 10  
 Paul Tichinin, Mendocino COE..... North Coast, Region 1  
 Steve Lund, Fort Bragg USD ..... North Coast, Region 1  
 Bob Owens, Lassen COE .....Northeastern, Region 2  
 Richard Holmes, Siskiyou UHSD .....Northeastern, Region 2  
 Ric Teagarden, Yuba COE ..... Capitol, Region 3  
 Sherry Smith, El Dorado UHSD ..... Capitol, Region 3  
 Mary Jane Burke, Marin COE ..... Bay, Region 4  
 Laura Alvarenga, San Rafael City HSD ..... Bay, Region 4  
 Sheila Jordan, Alameda COE, Alternate ..... Bay, Region 4  
 Tim Foley, San Benito COE, Vice Chair..... South Bay, Region 5  
 Marc Liebman, Berryessa USD ..... South Bay, Region 5  
 Michael Carey, Amador COE ..... Delta Sierra, Region 6  
 Bill Draa, Banta ESD..... Delta Sierra, Region 6  
 Larry Powell, Fresno COE..... Central Valley, Region 7  
 David Miller, Hilmar Unified SD ..... Central Valley, Region 7  
 Julian Crocker, San Luis Obispo COE, Past Chair..... Costa Del Sur, Region 8  
 Patrick Sayne, Paso Robles USD ..... Costa Del Sur, Region 8  
 Marc Ecker, Fountain Valley SD ..... Southern, Region 9  
 Jay N. Hoffman, Nuvview USD..... RIMS, Region 10  
 Amy Enomoto-Perez, Rosemead SD..... Los Angeles, Region 11  
 Darline Robles, Los Angeles COE ..... Los Angeles, Region 11  
 Frederick Harris..... Vice Chancellor, Community Colleges  
 Gavin Payne..... Deputy Superintendent, CDE  
 Larry Reider..... Administrative Agent, FCMAT  
 Joel Montero ..... Chief Executive Officer, FCMAT

**Guests and Staff:**

Russ Brawn ..... Chief Operations Officer, CSIS  
 Nancy Sullivan ..... Administrator, CSIS  
 Frank Fekete ..... Legal Counsel, FCMAT  
 Christine Frazier..... Associate Superintendent, KCSOS  
 Anthony Bridges..... Deputy Executive Officer, FCMAT  
 Roberta Mayor..... Chief Management Analyst, FCMAT  
 Gaye Edwards ..... Executive Secretary, KCSOS  
 Gary Thomas ..... BASC Chair

**Excused:**

Erik Skinner ..... Office of Secretary of Education  
 Bill Habermehl, Orange COE ..... Southern, Region 9  
 Don Singer..... San Bernardino Community College District

## **I. General Functions**

### **A. Call to Order**

The meeting of the FCMAT Board of Directors was called to order at 10:05 a.m. by Chair Herbert Fischer, San Bernardino County Superintendent of Schools.

### **B. Approval of Agenda**

A motion was made by Bob Owens and seconded by Bill Draa to approve the January 24, 2007 agenda. The motion was approved.

### **C. Minutes of October 15, 2006**

A motion was made by Marc Liebman and seconded by Fred Harris to approve the minutes of the October 15, 2006 board meeting. The motion was approved.

### **D. Welcome from FCMAT's Administrative Agent**

Dr. Larry Reider welcomed new board members Ric Teagarden from Yuba County Office of Education, Larry Powell from Fresno County Office of Education, Steve Lund from Fort Bragg Unified School District, and Marc Ecker from Fountain Valley School District. New board members introduced themselves to the board.

Chair Herbert Fischer introduced Gary Thomas, deputy superintendent for the San Bernardino County Office of Education stating that Mr. Thomas has a background in business and is a real force in that county and now at the state level, serving as BASC chair.

### **E. FCMAT Executive Committee Meeting**

Joel Montero reported that the bylaws allow FCMAT to proceed with hiring staff between the meetings of the Executive Committee, and there have been three positions in which action has been taken during the last quarter: 1) CSIS project manager, 2) programmer analyst, and 3) testing analyst. The three positions are in the CSIS Division and are employees of the Kern County Superintendent of Schools Office, and therefore, no action is required at this board meeting. The item is included for informational purposes. One programmer position remains vacant as this is a position that is becoming increasingly difficult to fill due to a competitive marketplace in which salaries have almost doubled.

Dave Miller asked if FCMAT has considered having more than one person to conduct the interviews. Christine Frazier reviewed the process that is followed for hiring personnel under the merit system in the Kern County Superintendent of Schools Office. A panel of several members interviews applicants early in the process and a final interview may be conducted by the administrator.

### **F. Public Participation**

There were no public comments.

### **G. Report from the California Department of Education**

Gavin Payne reported that CALPADS is working through proposals (RFPs) that have been submitted. General indications reveal that these are solid proposals.

The Opportunities for Learning (OFL) charter school audit continues to be litigated. FCMAT is assisting with this issue.

Gavin reported that Jack O'Connell has at the top of his priority list, providing local assistance for CALPADS. Telephone calls were made by the department to receive the last of the necessary information needed on the SSID issue, and the department will continue to push for good data.

Chair Herb Fischer stated that he appreciates the support received from Gavin Payne and Jack O'Connell and also from FCMAT regarding the charter schools. A question was asked if it is appropriate for FCMAT to sponsor a workshop regarding these charters. Joel Montero reported that FCMAT is already working on the process of how to get the information on charters out to the field. Joel requested an item be placed on the next agenda regarding profit-based charters for discussion. Many of the charters are falling into the same pattern.

## **H. Report from Secretary of Education or Designee**

There was no designee present.

## **I. FCMAT Organization**

Joel Montero reported that at the last board meeting the FCMAT organizational structure was discussed. The core staff for representation at board meetings is Christine Frazier, Roberta Mayor, and Anthony Bridges, but an attempt to incorporate other staff members into the meetings that come up will be made so that the board members can meet the staff.

Section I of the board packet shows the current FCMAT and CSIS organizational charts. FCMAT staff consists of eighteen members and the CSIS staff has grown and will continue to grow as CALPADS becomes integrated into the state. Staff is at a total of approximately sixty-four with about six or seven field staff. The structure is unique and is augmented by consultants as needed.

In the FCMAT chart there is a vacant chief management analyst position and FCMAT may have someone to introduce at the next board meeting for this position. Phil Scrivano, management analyst, has taken a position in the private sector at Lightspeed Systems leaving an open position at FCMAT. FCMAT will take this opportunity to look at the organizational structure and make changes as needed. FCMAT wants to support data management in the field for our colleagues. FCMAT has a unique and challenging structure in that some staff is located in the Bakersfield office and others are located throughout the state. It is important for FCMAT to have, for example, someone like Michele McClowry in the area that she is located in so that she can provide the necessary support in that part of the state.

CSIS staff is largely located in Sacramento. There are approximately forty-six staff members and a few of those are contract positions, as for example Charlie Burns. His skills and knowledge are important to CSIS. There are a couple of vacant positions such as the data base administrator and testing analyst. The tech sector is growing by leaps and bounds and it is difficult to compete with the private sector, but CSIS has some of the best and most dedicated staff. The last two months have been the most grueling two months of CSIS' history, and the staff is working seven days a week to support school districts.

Joel reported that the board members received two sheets of letterhead and the changes to the letterhead represent a philosophical change. In the early days of CSIS there was thought that CSIS might not continue to remain a part of FCMAT; but now the conclusion is that because of the funding mechanism, it is most likely to remain a part of FCMAT. It now has become important to find a single identity that combines the FCMAT and CSIS services in one logo. Board members received two sheets of letterhead because one sheet is specifically for FCMAT use which is indicated at the bottom of the page and one is for CSIS.

Joel reported that the third page of Section I is in response to Julian's question about the use of consultants. There were seventy-nine management assistance jobs last year, and FCMAT has always used the management assistance work to determine how busy the flow of work is or how great the penetration into the field is, relevant to the prior year. There were about sixty jobs in the prior year. The number of jobs is increasing and FCMAT will most likely exceed seventy-nine jobs this year. Twenty-five of the jobs

in 2005-06 were in fiscal health analysis and sixteen were in technology. Approximately \$800,000 was spent on consultants, but this cost is over-inflated due to one particularly expensive job and the annual average cost for consultants is usually approximately \$550,000.

At this time Joel asked for questions. Gavin Payne asked if the four regional service delivery teams that have been trained are reflected in these numbers. Joel answered that these personnel are not employed by FCMAT, but are given assistance by FCMAT and so their numbers are not reflected. The regional service teams provide a lot of management assistance and hopefully this will expand as a low cost option for districts to obtain assistance.

A question was asked if it can now be said that more districts have gone through training and are now fiscally stable. Joel answered that FCMAT is still responding to many fiscal requests. There have not been as many emergency fiscal crises, but the number of districts operating right below that level has grown.

Amy Enomoto-Perez reported that she appreciates the organizational charts included in the packet. She also asked Joel to talk about the consolidated application. Joel said to remember this is the year to use the student identifier to count students instead of CBEDS. There are districts that have struggled to meet certification, and the short-term impact is that for those districts that do not have an accurate count, the first sign of struggle will be the consolidated application.

## **J. Governor's Budget Review**

Joel reported that Proposition 98 creates stable funding for education and about 40% of the state's budget goes to fund education. Today a working knowledge of Prop 98 and how it relates to collective bargaining is needed. There are issues related to the three tests of Proposition 98 and it has become important to understand them. The LAO predicts that we are going to move into a test one environment. Test one is the status quo that gives you the minimum guarantee of funding, and is indicated by enrollment growth that is slow and property tax and a state general fund that is strong. Test two is the Holy Grail for education and gives education in excess of 40% of funding and enables the state to fund all of Prop 98. Test three is the maintenance factor test and is a problem because the state's general fund is negative and thus can't afford to fund all of Prop 98. The fourth element is suspension of Proposition 98 and is an option for the Governor.

If a district is in collective bargaining, is in declining enrollment with expenses and health care costs rising, but it is a test two state budget, then the district is in a good position. If a district moves into a test one environment, it will need to be careful especially in doing multi-year bargaining agreements. Because Prop 98 is so impacted by enrollment currently, a district must consider where enrollment is heading in the state. Health care costs will continue to increase. Two other issues related to Prop 98 to be aware of is that in some years Prop 98 can be over or under appropriated and the unallocated portion of Prop 98 comes into contention. Because the state's enrollment is in decline, this makes the Prop 98 base shrink.

Joel reported that two additional issues with the governor's proposed budget are raids on Prop 98: 1) the suggested move of home-to-school transportation which is currently guaranteed under Prop 98, out of Prop 98; and if moved from Prop 98 would have to compete for dollars, and 2) the suggested move of CALWORKs into Prop 98 which will reduce the spending power within Prop 98.

Joel reported that California's economy is rebounding, but the unfortunate issue is that there is a three to four billion dollar deficit in the budget plus state bonds that must be paid off. The Governor has decided that the bonds will be paid off early. If the state's revenue projections are good in May then the revenue limit deficit will not be discussed, but if this doesn't happen then it will.

A question was asked regarding the impact of retirements and the replacement of personnel with less expensive personnel. Joel reported that in many districts there is a shift in the salary schedule structure when less expensive personnel replace retirees, which provides a gain, but it is mitigated by step and column and increased costs in health care. This wipes out what a district would gain by replacing retirees with less expensive people on the salary schedule.

A question was asked if the universal health care proposal will in fact cost more and not save money. Joel reported that this is unknown now. This is the same proposal as seen in the past and basically doesn't reduce costs, but shifts costs to different sectors.

#### **K. California School Information Services (CSIS)**

Russ Brawn reported that the last two months have been the most difficult in the history of CSIS and for CSIS' clients as well. CSIS needed to be on top of software changes and support districts that will be using the system. CSIS staff is taking measures to address any problems that might have occurred. CSIS will narrow the focus to the things that will most benefit the clients.

Nancy Sullivan reviewed a handout that showed the number of LEAs reporting to date and those that were certified. The number of certified districts is rapidly expanding. There were 119 LEAs identified as at risk and 49 of those are charters. The remaining LEAs are small districts. There is money in the budget to provide assistance to districts in best practices. CSIS is looking forward to a best practice cohort and believes this will benefit districts by sharing data collected from the districts that have participated. Nancy reported that CSIS continues to have question and answer sessions posted on the web site.

Concern was voiced that the problem is in lack of funding. This is a great system but funds are needed to run the thing. This is not going to be a priority for districts because of the lack of funding to support this. Nancy reported that CSIS currently has a proposal for budget changes and the state department is doing what they can. Joel reported that CSIS is aware there are issues, and everyone's help is needed to move this budget proposal forward.

#### **L. California Community College Budget Appropriation**

Joel reported that there may be funds available in the budget for FCMAT to support the college district and a copy of a Budget Change Proposal was included in the board packet indicating where funds should be allocated.

#### **M. Status of Key FCMAT Assignments**

Roberta Mayor reported that FCMAT is ready to issue the latest Vallejo six-month progress report and board members should receive their copy in February. Language in the state budget act provided FCMAT authority to use its own money to develop the report. The report recommends a return to local governance of the operational areas of community relations/governance and pupil achievement.

FCMAT will begin field work in West Fresno in February and will issue a report in early April. West Fresno will likely show improvement in all operational areas with the exception of community relations and governance.

Anthony Bridges reported that there are currently two studies in draft for the Compton Community College District. The AB139 fraud audit of the college district has been completed but the report's release date is undetermined due to ongoing investigations by other state and federal agencies. The report of the comprehensive review of the college is still being revised in draft.

### **II. Board Members' Comments**

Chair Herbert Fischer thanked those in attendance and Joel Montero and extended appreciation to Larry Reider for providing the umbrella organization for FCMAT.

### **III. Agenda Items for Next Meeting**

There were no suggestions for agenda items at this time. Joel Montero had requested while discussing agenda item H that the next agenda include an item on profit-based charters for discussion.

**IV. Date and Location of Next Meeting**

The next meeting is scheduled for Thursday, March 22, 2007 from 10 a.m. to 1 p.m. at the Wyndham Hotel in Palm Springs.

**V. Adjournment**

The meeting was adjourned at 11:50 a.m.

**FISCAL CRISIS AND MANAGEMENT ASSISTANCE TEAM  
 BOARD OF DIRECTORS' QUARTERLY MEETING  
 Wyndham Hotel, Palm Springs  
 March 22, 2007  
 Minutes**

**Present:**

Herbert Fischer, San Bernardino COE, Chair ..... RIMS, Region 10  
 Paul Tichinin, Mendocino COE..... North Coast, Region 1  
 Steve Lund, Fort Bragg USD ..... North Coast, Region 1  
 Richard Holmes, Siskiyou UHSD .....Northeastern, Region 2  
 Ric Teagarden, Yuba COE ..... Capitol, Region 3  
 Sherry Smith, El Dorado UHSD ..... Capitol, Region 3  
 Mary Jane Burke, Marin COE ..... Bay, Region 4  
 Laura Alvarenga, San Rafael City HSD ..... Bay, Region 4  
 Tim Foley, San Benito COE, Vice Chair..... South Bay, Region 5  
 Marc Liebman, Berryessa USD ..... South Bay, Region 5  
 Michael Carey, Amador COE ..... Delta Sierra, Region 6  
 Bill Draa, Banta ESD..... Delta Sierra, Region 6  
 Larry Powell, Fresno COE..... Central Valley, Region 7  
 David Miller, Hilmar Unified SD ..... Central Valley, Region 7  
 Julian Crocker, San Luis Obispo COE, Past Chair..... Costa Del Sur, Region 8  
 Patrick Sayne, Paso Robles USD ..... Costa Del Sur, Region 8  
 Marc Ecker, Fountain Valley SD ..... Southern, Region 9  
 Jay N. Hoffman, Nuvview USD..... RIMS, Region 10  
 Amy Enomoto-Perez, Rosemead SD..... Los Angeles, Region 11  
 Darline Robles, Los Angeles COE ..... Los Angeles, Region 11  
 Don Singer..... San Bernardino Community College District  
 Susie Lange ..... Deputy Superintendent, CDE  
 Larry Reider..... Administrative Agent, FCMAT  
 Joel Montero ..... Chief Executive Officer, FCMAT

**Guests and Staff:**

Russ Brawn ..... Chief Operations Officer, CSIS  
 Anthony Bridges..... Deputy Executive Officer, FCMAT  
 Barbara Dean ..... Deputy Administrative Officer, FCMAT  
 Frank Fekete ..... Legal Counsel, FCMAT  
 Christine Frazier..... Associate Superintendent, KCSOS  
 Michele Huntoon ..... Chief Management Analyst, FCMAT  
 Roberta Mayor..... Chief Management Analyst, FCMAT  
 Barbara Smith ..... Executive Secretary, FCMAT  
 Gary Thomas ..... BASC Chair  
 Marta Reyes..... Director, Charter Schools, CDE  
 Gil Navarro ..... San Bernardino County Board of Education  
 Doug Ford..... Solano County Board of Education  
 Francie Heim..... Deputy Superintendent, El Dorado COE

**Excused:**

Bob Owens, Lassen COE ..... Northeastern, Region 2  
 Bill Habermehl, Orange COE ..... Southern, Region 9  
 Sheila Jordan, Alameda COE, Alternate ..... Bay, Region 4  
 Frederick Harris..... Vice Chancellor, Community Colleges

## **I. General Functions**

### **A. Call to Order**

The meeting of the FCMAT Board of Directors was called to order at 10:05 a.m. by Chair Herbert Fischer, San Bernardino County Superintendent of Schools.

### **B. Approval of Agenda**

A motion was made by Larry Powell and seconded by Bill Draa to approve the March 22, 2007 agenda. The motion was approved.

### **C. Minutes of January 24, 2007**

A motion was made by Michael Carey and seconded by Amy Enomoto-Perez to approve the minutes of the January 24, 2007 board meeting. The motion was approved.

### **D. Welcome from FCMAT's Administrative Agent**

Dr. Larry Reider welcomed the participants to the meeting.

### **E. FCMAT Executive Committee**

Joel reported that the Executive Committee approved the filling of two new positions. Information regarding these positions is provided in the board packets. One position was an Acceptance Testing Specialist for CSIS. The second position was a Chief Management Analyst for FCMAT. This position was filled on March 1, 2007 by Michele Huntoon who was introduced to the members. Michele briefly shared her background.

Joel commented on the recent published Compton Community College District fraud audit and its findings. Joel shared that some are taking exception to some of the findings. The report was held in draft for some time to allow other state and Federal agencies an opportunity to conduct their own parallel investigations. The purpose of an AB139 report is not to determine guilt or innocence, but to determine if there is sufficient evidence to move forward to a formal investigation.

Joel requested the board to direct any calls regarding FCMAT reports to Joel, who is the sole responder. Roberta has assisted in fielding calls on the Compton Community College District report.

### **F. Public Participation**

There were no public comments.

### **G. Report from the California Department of Education**

Susie Lange reported that she recently e-mailed the board requesting items that they would like her to address during her FCMAT report. She mentioned that Paul Tichinin asked about EAAP. It was discussed that the executive director of EAAP might be invited to attend the June meeting. She asked the board to prepare questions for the executive director.

Susie commented that CALPADS has had some problems, but the student identifiers are in place. The difficulty continues to be getting the districts to submit the identifiers. There is legislation to request ongoing funds to assist the districts in putting together and maintaining their local systems. This needs to be kept a high priority.

Susie reported that SB352 had some difficulty getting started which delayed the funding. This program will continue and hopefully there will be funds to accommodate the students who want to participate.

Susie asked the board to share any feedback they've received.

Susie reported that Jack O'Connell is focusing on the achievement gap. Students are performing better, but the achievement gap still remains. The gap is not only between socioeconomic groups, but also between the ethnicities.

Susie reported that the new state administrator of Oakland Unified School District, Kim Statham, has a collaborative style and is involving the community and bringing the community together. Vallejo City Unified School District is improving.

Susie stated that the standards and criteria that FCMAT uses for the comprehensive studies needs to be reevaluated and the State Board of Education and the Department of Education will be providing input on how to measure improvement. This item will be brought to the board to discuss at a future meeting.

Joel stated that the board will be engaged in the comprehensive review process and that a preliminary draft of any revisions will be distributed to the board in the future.

Susie distributed the latest list of the districts with negative and qualified certifications.

Patrick Sayne suggested that FCMAT or the board spend some time in addressing the California Adequacy Study. Herb Fischer commented that it needs to be determined what role we want FCMAT to play and that the executive committee will continue this discussion. Joel suggested that possibly Ted Mitchell could attend our next meeting to discuss the Adequacy Study. Julian Crocker commented that the performance reports we are receiving are related to the amount of funding education receives.

Herb asked Susie to share with Jack his appreciation of Jack's willingness to address the achievement gap.

#### **H. Report from the Secretary of Education or Designee**

Herb shared that Erik Skinner has accepted a position with the Chancellor's Office for the California Community Colleges. Scott Himmelstein is the acting Secretary of Education.

#### **I. CBO Mentor Project**

Joel introduced Francie Heim to discuss the CBO Mentor Project. He reported that this is a rigorous program and one must be nominated to be accepted in the program. He shared that this program is being replicated throughout the state and there are a few out of state groups using the financial curriculum. The California Coalition for Adequate School Housing (CASH) and the California Educational Technology Professionals Association (CETPA) has developed a training program modeled after the CBO Mentor Project.

Francie provided an update of the program. Michele Huntoon commented that School Services of California has placed past graduates of the CBO Mentor Project in CBO positions throughout the state. The program is considered a plus on an applicant's resume.

A motion was made by Jay Hoffman and seconded by Bill Draa to approve the fourth cohort of the CBO Mentor Project. The motion was approved.

#### **J. COE Fiscal Procedural Manual**

Joel reported that one of FCMAT's responsibilities is product development. FCMAT has partnered with BASC on the development of the COE Fiscal Procedural Manual. The manual is updated on an annual basis. The 2007 updates were distributed to all county offices and provided for the board members. Gary Thomas shared that the manual has become the operational guide for his staff and for new staff members.

Patrick Sayne shared that it would be helpful to have some guidelines developed for school districts to consider before opening a new school, that includes the costs of opening and running a new school. Gary Thomas said that he would provide this request to the facilities committee and the Office of Public School Construction.

#### **K. California School Information Services (CSIS)**

Russ Brawn reported that there are 119 LEAS in danger of not fulfilling the requirements for the Annual Statewide Student Identifiers Maintenance. There were 34 districts that did not succeed in completing the submission, but CSIS has been given an eleven month window to get the extra 34 districts in. Russ commented that he is very proud of his staff and the work that they have accomplished. He anticipates that the spring submission will go smoothly and at a more reasonable pace.

Russ reported that a summary of the proposed changes to the Strategic Plan are included in the board packets. These changes will be brought back to the board in June for approval.

Russ said that the timeline for the Best Practices rollout is through June 2009 and there have been 300 districts who have attended training.

Mary Jane asked what can be done to obtain funding to update the CSIS equipment. Joel stated that he and Russ have been proactive with the budget committees and have made requests for additional funding. He shared that CSIS does not receive a COLA. Joel encouraged board members to contact their local officials and those who sit on the budget committees to support the need for additional funds.

Richard Holmes commented that the state of Oregon lost all their student data because of inadequate equipment, and it would be catastrophic if California were to lose theirs because of outdated equipment. Paul Tichinin asked Susie if the CDE was working with CSIS and FCMAT on the budget issues. Susie said they were, and that the budget request goes through them. Susie commented that it was important that the boards and the staff understand what can be done with this student data.

#### **L. Regional Team Activity Summary**

Joel reported that the FCMAT board has the responsibility of reviewing the progress of the regional teams. Barbara Dean reported that AB2756 states that the regional teams will receive funding on a calendar basis and that the teams are required to file an annual report. FCMAT evaluates their performance. Gary Thomas commented that the regional team has been a wonderful addition to their region and that they've received very positive feedback. They are looking into providing computer forensics and assisting districts with declining enrollment.

Marc Liebman indicated that he was concerned about approving a budget with the limited information provided. He stated that the summary did not include what the money covered and that more information was needed in the report. Joel shared that in October the board will be asked to vote on the regional team budgets and that at that time the report will be expanded.

Joel reported that FCMAT has been asked when the number of regional teams will be expanded. It was originally discussed that each region would have a team and we are hopeful that each will. Gary Thomas commented that FCMAT has been a tremendous support and has provided many resources.

#### **M. Charter Schools Overview**

Joel introduced Marta Reyes, director of the Charter Schools Division with the California Department of Education. Marta distributed a number of documents for information. She shared that there are regional consultants that are available throughout the state. She provided an overview of the charter schools program.

Larry Powell commented that they had a charter in their county that was denied and then re-applied to the state. He asked if the previous denial was considered in the decision. Herb Fischer commented that the FCMAT reports on the California Charter Academy and the Options for Youth/Opportunities for Learning Charter Schools were given to their local district attorneys and no charges have been filed related to these reports. He stated that currently the same people are opening new charters in the same areas.

Don Singer commented that he has faith in Marta's division to stop the illegal activities. There were comments that there should be a focus on charter school law and the issue of charter renewals. Marta shared that there has been some training workshops provided on charters. Herb thanked Marta for what she does and extended the board's appreciation to her for taking the time to meet with the FCMAT board.

## **N. Status of Key FCMAT Assignments**

Roberta Mayor reported that the next report for Vallejo City Unified School District will be issued in late June or early July. The last report was issued in January 2007. It was recommended that two operational areas, Community Relations/Governance and Pupil achievement, be considered for return to local governance. The district is hopeful that additional areas will be recommended for return during this next review. The team is scheduled to be in the district in late April. If three or more of the five operational areas are recommended for return to local governance, the district will seek the SPI's approval to begin a search for a superintendent. A state administrator/trustee would continue to provide oversight.

The review teams have completed their field work for West Fresno Elementary School District and are preparing the report that will be issued in April. There has been progress made in all operational areas, but the board would benefit from additional training in governance. The last report for West Fresno was issued in July 2005, almost two years ago.

Roberta reported that the next Compton Unified School District report will be issued in April. The last report, dated August 2006, was held until February because the district, FCMAT, and the ACLU were working on amending the stipulations of the Consent Decree. The only area under the original Consent Decree that remains outstanding is the implementation of the Facilities Master Plan. The ACLU has been open to consideration of an amendment that would lead to earlier termination of Consent Decree oversight.

Roberta reported that the Compton Community College District Extraordinary Report was issued March 12, 2007 and that a great deal of feedback has been received, some positive and some negative. The Compton Community College District comprehensive review will be issued in mid April. The Compton CCD is trying to recover fiscally and reestablish its accreditation.

Don Singer commented that he was appalled with the findings in the audit report and he is glad that El Camino Community College has agreed to provide the students with an accredited education.

Anthony Bridges reported that a FCMAT alert will be issued within the next month regarding redevelopment agency fees (RDA's). He reported that prior to the law in January 1994, districts could receive funding from redevelopment areas for facilities and operations. FCMAT is finding that some school districts are not reporting RDA revenues to off-set their revenue limit calculations and may be over-funded by millions of dollars. FCMAT will provide support to the districts on how districts need to handle this.

## **II. Board Members' Comments**

Herb thanked the district superintendents who traveled to attend the board meeting.

**III. Agenda Items for Next Meeting**

There were no agenda items proposed for the next meeting. Suggestions were made earlier in the meeting to invite the executive director of EAAP to attend a meeting, and Ted Mitchell to discuss the Adequacy Study.

**IV. Date and Location of Next Meeting**

The next meeting is scheduled for Sunday, June 24, 2007 from 10:00 a.m. to 1:00 p.m. at the Westin Hotel in San Diego.

**V. Adjournment**

The meeting was adjourned at 1:00 p.m.

**FISCAL CRISIS AND MANAGEMENT ASSISTANCE TEAM  
 BOARD OF DIRECTORS' QUARTERLY MEETING  
 Westin Hotel, San Diego  
 June 24, 2007  
 Minutes (Unadopted)**

**Present:**

Herbert Fischer, San Bernardino COE, Chair ..... RIMS, Region 10  
 Dave Geck, Lake COE, Alternate ..... North Coast, Region 1  
 Steve Lund, Fort Bragg USD ..... North Coast, Region 1  
 Richard Holmes, Siskiyou UHSD ..... Northeastern, Region 2  
 Ric Teagarden, Yuba COE ..... Capitol, Region 3  
 Sherry Smith, El Dorado UHSD ..... Capitol, Region 3  
 Mary Jane Burke, Marin COE ..... Bay, Region 4  
 Tim Foley, San Benito COE, Vice Chair ..... South Bay, Region 5  
 Marc Liebman, Berryessa USD ..... South Bay, Region 5  
 Michael Carey, Amador COE ..... Delta Sierra, Region 6  
 Bill Draa, Banta ESD ..... Delta Sierra, Region 6  
 David Miller, Hilmar Unified SD ..... Central Valley, Region 7  
 Julian Crocker, San Luis Obispo COE, Past Chair ..... Costa Del Sur, Region 8  
 Patrick Sayne, Paso Robles USD ..... Costa Del Sur, Region 8  
 Marc Ecker, Fountain Valley SD ..... Southern, Region 9  
 Jay N. Hoffman, Nuvview USD ..... RIMS, Region 10  
 Amy Enomoto-Perez, Rosemead SD ..... Los Angeles, Region 11  
 Ken Shelton, Los Angeles COE, Alternate ..... Los Angeles, Region 11  
 Don Singer ..... San Bernardino Community College District  
 Susie Lange ..... Deputy Superintendent, CDE  
 Larry Reider ..... Administrative Agent, FCMAT  
 Joel Montero ..... Chief Executive Officer, FCMAT

**Guests and Staff:**

Russ Brawn ..... Chief Operations Officer, CSIS  
 Nancy Sullivan ..... Administrator, CSIS  
 Anthony Bridges ..... Deputy Executive Officer, FCMAT  
 Frank Fekete ..... Legal Counsel, FCMAT  
 Roberta Mayor ..... Chief Management Analyst, FCMAT  
 Barbara Smith ..... Executive Secretary, FCMAT  
 Gary Thomas ..... BASC Chair  
 Anthony Monreal ..... Deputy Superintendent, CDE  
 Michael Ricketts ..... Deputy Executive Officer, CCSESA  
 John Mockler ..... Mockler & Associates  
 Kermith Walters ..... Supt., Siskiyou COE

**Excused:**

Paul Tichinin, Mendocino COE ..... North Coast, Region 1  
 Bob Owens, Lassen COE ..... Northeastern, Region 2  
 Laura Alvarenga, San Rafael City HSD ..... Bay, Region 4  
 Sheila Jordan, Alameda COE, Alternate ..... Bay, Region 4  
 Larry Powell, Fresno COE ..... Central Valley, Region 7  
 Bill Habermehl, Orange COE ..... Southern, Region 9  
 Darline Robles, Los Angeles COE ..... Los Angeles, Region 11  
 Frederick Harris ..... Vice Chancellor, Community Colleges

## **I. General Functions**

### **A. Call to Order**

The meeting of the FCMAT Board of Directors was called to order at 10:05 a.m. by Chair Herbert Fischer, San Bernardino County Superintendent of Schools.

### **B. Approval of Agenda**

A motion was made by Bill Draa and seconded by Jay Hoffman to approve the June 24, 2007 agenda. The motion was approved.

### **C. Minutes of March 22, 2007**

A motion was made by Marc Liebman and seconded by Amy Enomoto-Perez to approve the minutes of the March 22, 2007 board meeting. The motion was approved.

### **D. Welcome from FCMAT's Administrative Agent**

Dr. Larry Reider welcomed the new board members, Wes Smith and Jose Gonzalez and welcomed back a returning board member, Debra Bradley. Larry thanked those who attended Tom Henry's retirement party. He also thanked the board members and Joel for their leadership of FCMAT.

### **E. Recognition of Retirees**

Dr. Herbert Fischer reported that Tom's retirement party was very successful. He also recognized Dr. Reider for his work as FCMAT's Administrative Agent.

Retiring board members Richard Holmes, Superintendent of Siskiyou Union High School District and David Miller, Superintendent of Hilmar Unified School District were recognized for their dedication and service to FCMAT.

### **F. FCMAT Executive Committee**

Joel reported that the Executive Committee meets prior to the board's quarterly meetings and between board meetings; they approve the hiring of new staff. They recently approved the hiring of a CSIS Program Analyst. He shared that CSIS has several more openings that will need to be filled.

### **G. Public Participation**

There were no public comments.

### **H. Report from the CEO**

Joel reported that he would use time at the meetings to discuss the organization's operations. FCMAT currently has two positions open, for a Fiscal Intervention Specialist and a Management Analyst in technology. Joel reported that he and Anthony will be interviewing the four final candidates for the Fiscal Intervention Specialist this week. The final interviews for the Management Analyst position will be conducted in July. More information on the filling of these positions will be available at the October meeting.

Joel reported that in January 2005 legislation was passed that allowed FCMAT to assist charter schools. The requests for charter school assistance have increased. FCMAT has been asked by the department of education to assist in the review of state board-approved charters. The State Board of Education approves charters when they are not approved at the county or LEA level. There are nine state board-approved charters. FCMAT has been involved with two, New West Charter School and Livermore Valley

Charter School. Livermore Valley is experiencing a cash flow problem and FCMAT will become engaged as a fiscal advisor and will assist in developing a recovery plan. Requests for assistance in this area will continue to increase as the department of education approves charter schools.

## **I. Report from the California Department of Education**

Susie Lange introduced the new Deputy Superintendent of Curriculum & Instruction, Anthony Monreal.

Susie reported that student identifiers continue to be a challenge. The department is finding that student information is in greater demand. The issue of privacy continues to be raised and addressed. There are federal laws challenging what should or should not be made available. Susie shared that Jack O'Connell is forming an advisory committee. Susie reported that CALPADS will receive ongoing funding for student identifiers and the subject of identifiers for teachers is being discussed.

Susie reported that the department of education is very close to returning local authority to Vallejo City Unified School District. Oakland Unified is making slow progress and the department is trying to determine how to return powers back to their board. West Fresno Elementary remains under a state administrator.

Ken Shelton suggested that dialogue between the department and the county office occur before all powers are restored to a district. This dialogue would have been helpful with the Los Angeles County Office of Education before authority was returned to Compton, to determine what went well and what didn't. Susie reassured Ken that they will work with the county superintendents.

Susie also stated that Emery Unified is still struggling. Susie requested that at a future board meeting she would like to discuss the expansion of the regional teams as the program has been very successful.

Tony Monreal commented how much he appreciated Larry Reider's support when he was a district superintendent in Kern County. Tony reported that his department will be focusing on support of English Language Learners, implementation of the after school programs and improvement of the assessment test scores. Other priorities will be looking at how the Special Education system is working, implementing health care centers, and working with the Department of Corrections on Alternative Education.

Julian asked about charter schools and the issue of conflict of interest. Herb stated that the California Charter Academy audit surfaced the need for a review of the board's responsibility. It was suggested that FCMAT address the issue of charter schools, by perhaps drafting a letter to the state board addressing the issues that the FCMAT reports have noted, and how the regulations have fallen short. Joel stated that Government Code 1090 addresses the issue of conflict of interest which was the issue in recent charter school reports. Frank suggested that such a letter come from the FCMAT CEO after review by the Executive Committee.

Gary Thomas stated that he was part of a committee and was informed that there was no way to mandate Government Code 1090 on charter schools. Districts should require language in the MOU or petition to follow GC 1090. Ken Shelton mentioned that conflict of interest is not only an issue for charters and this issue has appeared in other FCMAT reports. It was agreed that Joel will submit a letter to the state board.

## **J. Report from Secretary of Education or Designee**

A representative was not present.

## **K. CBO Mentor Project – 4th cohort**

Joel reported that the fourth cohort of the CBO Mentor Project has begun. The board should have received the orientation binder with their board packets. An Executive Report on the Mentor Project will

be presented at the October board meeting. Gary Thomas reported that he is a mentor for this cohort and he is impressed with the candidates this year.

## **L. California State Budget Update**

Michael Ricketts, the deputy executive officer of CSESAs, commented on the Governor's May Revision. The May Revision included funding for CSIS CALPADS, but he is not sure it will be included in the final version of the budget. He reported that the budget is still being reviewed in both houses and has not been passed to the governor. This will be a tight budget and most of the proposals in the May Revision likely will not be funded. The final budget will depend on the negotiations of the Big Five.

John Mockler discussed the May Revision and the pending budget. John provided an overview of the Proposition 98 Test 1, 2 and 3 environments. John shared that there was rapid growth in the late 1980's but now there is a decline in enrollment. This will affect school funding.

John reported that the Quality Education Investment Act (QEIA), SB 1133 brought about a shift in policy. The Governor and the CTA wanted to invest in those schools that needed the most help. Schools were asked to apply for the funding and many districts that could have used the funding did not apply. The funding will continue for seven years. There are some districts such as the Kern High School District that will be receiving a lot of funds through the program for their schools.

## **N. LEA Debt**

Anthony Bridges reported that FCMAT is concerned with the amount of debt some LEAs are incurring. Anthony reported that districts need to apply a debt ratio to determine what kind of debt they can carry. He shared that there can be problems when a district uses, for example, a COP to cover a bond fund. This practice has been seen in districts that have fallen into state receivership. The county offices need to protect the districts from incurring long term debt. When the district's payroll covers 85-90% of the budget, there is little flexibility.

Ken Shelton discussed the issue of Other Post Employment Benefits (OPEB) Bonds. He indicated that LEAs are looking to the state for guidance and the attorney general is developing a legal response. The governor has established a commission for gathering data and surveys were mailed and due on June 29. This is a statewide issue and will ultimately be an AB1200 oversight issue. Anthony shared that the governor is looking at developing strategies for GASB 45 and dealing with the large unfunded retirement benefits.

## **O. California School Information Services (CSIS)**

Susie shared that CDE was providing CSIS with \$461,000 to assist with the maintenance of the student identifiers.

Nancy Sullivan reported that the CSIS Strategic Plan has been updated to include the new practices for CALPADS and CALTIDES. The plan reflects the business challenges and objectives to assist the State in serving students. Nancy welcomed any feedback or questions from the board. Patrick Sayne commented that it's important to check the data and coding in the reports.

A motion was made by Mary Jane Burke and seconded by Debra Bradley to approve the changes to the CSIS Strategic Plan. The motion was approved.

Nancy reported that the Needs Assessment for the Best Practices cohort was in the board packets. The document is color coded to represent the areas that need improvement. She suggested that everyone review their summary reports for data on their LEA. The lowest scores are from those who were not trained on CSIS submissions. The Needs Assessment report is helpful to the LEAs and assists CSIS in determining how best to move forward.

## **P. RDA FCMAT Alert & FAQs**

Anthony reported that FCMAT has posted to its web site an Alert and FAQs (frequently asked questions) regarding payments from redevelopment agencies (RDAs). Districts need to look at why they are receiving those revenues. The specifics will be different for every agency. Anthony stated that there needs to be training for the local auditors to know what to look for in RDA requirements.

## **Q. Status of Key FCMAT Assignments**

### West Fresno Elementary School District

Roberta Mayor reported that the latest comprehensive report for West Fresno Elementary School District was issued in April 2007. This was the first report in almost two years and reflected the progress made under a newly appointed state administrator. The district made a lot of progress, but no operational areas were recommended for return to local governance. There will likely be a report issued in another year unless the district requests an earlier report at its own expense.

### Vallejo City Unified School District

Roberta reported that the next Vallejo report will be issued in early July 2007. The district is reviewing the draft report. In the January 2007 report, it was recommended that the state superintendent return two operational areas to local governance, but the state decided to hold off until there was another review, as other areas appeared close to meeting

the criteria for return. The July report will recommend that a third operational area also be returned. With three of five areas to be returned, the district is beginning the process of hiring a superintendent.

### Oakland Unified School District

Roberta reported that the last Oakland report was issued in September 2006. The district has been waiting for legislation to provide funding for another report. The FCMAT teams will conduct their field work in September and October when school is in session. The September 2005 and 2006 reports recommended that the operational area of Community Relations/Governance be returned to local board governance, but this has not occurred, prompting AB 45. This bill would base the return of an operational area on FCMAT's recommendation, not on the state superintendent's action. AB 45 sets up timelines for implementation, such as July 1 for the return of an operational area following FCMAT's recommendation. The bill has passed the Assembly and was referred to the Senate education committee. FCMAT is not seeking the authority proposed by the bill.

### Compton Unified School District

Roberta reported that all parties to the Consent Decree, except the Department of Finance, have agreed to an amendment to the Consent Decree for Compton USD. Approval from the Department of Finance is still pending. Two reports for Compton Unified were issued back to back because FCMAT was hoping to hear from the DOF before issuing the August 2006 report in the new format reflecting the amended terms. The only stipulation of the original Consent Decree that remains to be implemented is the full implementation of the Facilities Master Plan. As the Facilities Master Plan needs to be periodically updated, it would take years to "complete." FCMAT monitors ten standards in each of the five operational areas under the terms of the amendment. The district did not meet the criteria in all five areas in the August 2006 report, but they did do so in the February 2007 report. The ACLU will consider terminating the Consent Decree if the criteria in the five areas have been met for two consecutive six-month periods through February 2008.

Compton Community College

The Compton Community College report was issued in April 2007 and this report provides base line ratings for progress reviews. Reports will be issued in January and July and it is expected to be a 6-8 year commitment.

**II. Board Members' Comments**

There were no comments from the board.

**III. Agenda Items for Next Meeting**

There were no items suggested for the next meeting.

**IV. Date and Location of Next Meeting**

The next meeting is scheduled for Sunday, October 14, 2007 from 10:00 a.m. to 1:00 p.m. at the Dolce Hayes Mansion in San Jose.

**V. Adjournment**

The meeting was adjourned at 1:00 p.m.