

SANTA BARBARA COUNTY SELPA JOINT POWERS AGENCY BOARD

Regular Meeting

Monday, March 1, 2021

Public Session – 12:00 p.m.

Via ZOOM – Meeting ID: 910 5144 5476

***There will be no physical location for this meeting due to COVID-19 and Governor Newsom's Executive Order N-29-20 regarding Shelter in Place.**

PUBLIC – Should you wish to attend the SBCSELPA JPA Board Meeting via Zoom please contact Lindsay MacDonald, SBCSELPA Executive Secretary, by Monday, March 1, 2021 at 11:00 a.m. to request Zoom Meeting Information and Login. Lindsay MacDonald can be contact via email, lmacdonald@sbceo.org, or by calling the SBCSELPA Office at (805) 683-1424.

Agenda

In compliance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting or need this agenda provided in a disability-related alternative format, please contact the SBCSELPA Office at 683-1424. Prompt notification will assist the SBCSELPA to make suitable arrangements.

PUBLIC COMMENTS ARE WELCOME

The Santa Barbara County SELPA JPA Board will receive public comments about items appearing on today's agenda, as well as other matters within the subject matter jurisdiction of the Board. All such comments will be received during the Public Comments section of the agenda. Individuals who address the Board are limited to three (3) minutes to speak on any item and a total of 10 minutes on all items for their presentation. The Board may limit the total time for all public comment to 30 minutes. Persons needing additional time are requested to submit the information in writing.

For comments concerning matters not on the agenda, open meeting laws and fairness to other residents who may have an interest in your topic prohibit the Board from taking action or engaging in extended discussion of your concerns. The Board may direct staff to meet at a later date with speakers who have specific concerns or needs. The Board may also direct that an issue be placed on a future agenda for discussion and consideration. This permits the Board and staff members to prepare and receive necessary information and for the public to be aware that a topic is being formally considered. We appreciate your cooperation.

Due to COVID-19 and Governor Newsom's Executive Order N-29-20 this meeting is being held virtually, with no physical location. Forms are available from the Board's secretary for requests to address the Board. Should you wish to address the Board during this virtual meeting please email Lindsay MacDonald, lmacdonald@sbceo.org, to request a form. Persons wishing to make public comments are requested to complete the appropriate form and return it to the Board Secretary via email.

I. PUBLIC SESSION

- A. Call to Order
- B. Roll Call
- C. Flag Salute
- D. Welcome Guests
- E. SBCSELPA Executive Director's Report

REF: I-E

II. PUBLIC COMMENTS

Please refer to information above regarding public comment guidelines.

III. **APPROVAL OF ADDITIONAL EMERGENCY ITEMS** (Government Code Section 54954.3(b)(2))

IV. **APPROVAL OF ACTION AGENDA**

It is recommended that the JPA Board take action to approve the action agenda as presented/amended.

Motion: _____
 Second: _____
 In Favor: _____
 Opposed: _____
 Abstained: _____

V. **CONSENT AGENDA ITEMS**

- A. Minutes of February 1, 2021 Regular Meeting REF: V-A
- B. Ratification of Payment of Claims REF: V-B
- C. 2020-21 Nonpublic School (NPS) Master Contract Rates REF: V-C
 - 1. Exhibit A Rates Sheet: Falcon Ridge Ranch
- D. 2020-21 Nonpublic Agency (NPA) Master Contract Rates REF: V-D
 - 1. Exhibit A Rates Sheet: Goodfellow Occupational Therapy
 - 2. Exhibit A Rates Sheet: STAR Academy

It is recommended that Consent Agenda Items A through D be approved as presented.

Motion: _____
 Second: _____
 In Favor: _____
 Opposed: _____
 Abstained: _____

VI. **ITEMS SCHEDULED FOR ACTION/CONSIDERATION**

- A. SBCSELPA 2021 Office Reorganization Proposal REF: VI-A
 - 1. Proposed New Job Descriptions
 - 2. Proposed New Salary Schedules
 - 3. Revised Job Descriptions and Salary Schedules

It is recommended that the JPA Board approve the SBCSELPA office reorganization proposal as presented.

Motion: _____
 Second: _____
 In Favor: _____
 Opposed: _____
 Abstained: _____

- B. Certification of Second Interim Report for Fiscal Year 2020 – 2021 REF: VI-B
 - 1. First and Second Interim Comparison
 - 2. Revenue and Expenditure Multi-Year Comparison
 - 3. Multi-Year Projections Assumptions 2020-2021 Second Interim
 - 4. Second Interim Report

It is recommended that the JPA Board certify the Second Interim Report for Fiscal Year 2020-2021 as presented.

Motion: _____
 Second: _____
 In Favor: _____
 Opposed: _____
 Abstained: _____

VI. ITEMS SCHEDULED FOR ACTION/CONSIDERATION (continued)

- C. Designation of the Official Representatives to the Santa Barbara SIPE Joint Powers Authority Board of Directors
1. Resolution for Designation

REF: VI-C

It is recommended that the JPA Board approve the proposed resolution for designation of official representatives to the Santa Barbara SIPE Joint Power Authority Board of Directors as presented.

Motion: _____

Second: _____

In Favor: _____

Opposed: _____

Abstained: _____

VII. ITEMS SCHEDULED FOR INFORMATION AND DISCUSSION

- A. SBCEO First Interim Financial Report Analysis and Recommendations

REF: VII-A

- B. Santa Maria-Bonita School District TLP/G.R.O.W. Assurance Letter

REF: VII-B

- C. JPA Board Membership Term Expirations

REF: VII-C

- D. SBCSELPA Procedural Handbook, Section 2, Occupational Therapy (OT) Referral Procedure, Revision

REF: VII-D

1. Procedural Handbook, Section 2, OT Process
2. OT Pre-Referral and Referral Flowchart
3. OT Referral for Assessment

- E. Announcement of 2nd Annual SELPA-Bration Winners

REF: VII-E

- F. SBCSELPA Professional Development

REF: VII-E

- G. LEA/District Costs Associated with Due Process SBCSELPA Year-to-Date Account Balances

REF: VII-F

- H. SBCSELPA Legal Fees Year-to-Date Reserve

REF: VII-G

- I. Nonpublic School (NPS) Year-to-Date Placement Expenditures

REF: VII-H

VIII. MISCELLANEOUS AGENDA ITEMS

- A. Items Proposed for Future Action or Discussion

- B. Next Scheduled JPA Board Meeting: Date: May 3, 2021

Time: 12:00 p.m.

Location: Via Zoom due to COVID-19

IX. PUBLIC COMMENT PERIOD REGARDING CLOSED SESSION ITEMS

Please refer to information at beginning of agenda regarding public comment guidelines.

X. CLOSED SESSION:

- A. Confidential Nonpublic School (NPS) Student Updates

REF: X-A

- B. Evaluation of the SBCSELPA Executive Director

REF: X-B

- XI. **RECONVENE TO PUBLIC SESSION:** Report of action taken in Closed Session, as appropriate.
- XII. **ADJOURNMENT**

SBCSELPA EXECUTIVE DIRECTOR'S REPORT TO JPA BOARD

March 1, 2021

1) Due Process/Dispute Updates County-Wide-

Two Due Process filings in progress and no CDE investigations.

2) Non-Public School (NPS) Placement Update-

We have a total of (5) SBCSELPA funded NPS placements and no district funded placements. There are two NPS placements pending IEP team approval.

3) Legislative and Budgetary Information-

-No updates at this time.

4) State SELPA Association -

LEGAL SYMPOSIUM: SEE PowerPoint titled, "Legal Panel, February 9, 2021".

Highlights-

Reframing "compensatory education" as learning loss—especially for IEP team discussions--allows school districts to acknowledge the impact of the pandemic (on all students) without admitting an intentional denial of FAPE. Being proactive about learning loss can help build trust with parents.

5) CDE COMPLIANCE and CALPADS Updates-

LCAP Development and "Consultation" from SBCSELPA:

"The superintendent of the school district shall consult with its special education local plan area administrator or administrators to determine that specific actions for individuals with exceptional needs are included in the local control and accountability plan or annual update to the local control and accountability plan and are consistent with strategies included in the annual assurances support plan for the education of individuals with exceptional needs."

Education Code Section 52062(a)(5)



Legal Panel

February 9, 2021

Attorney Panel:



- Adam Newman- Atkinson, Anderson, Loya, Ruud & Romo
- Elizabeth Estes-Atkinson, Anderson, Loya, Ruud & Romo
- Jan Tomsy- Fagen, Friedman, and Fulfrost LLP
- Sarah L. Garcia- Lozano Smith
- Carl Corbin- School and College Legal Services of California

Panel Format



- The attorneys will each present for 20 minutes with a Q/A at the end of all presentations.
- To ask questions, please type it in the Chat.

FAPE v. “COVID FAPE” and DLPs

PRESENTED BY:
Adam J. Newman, Esq.
Elizabeth A. Estes, Esq.



Student v. Norris School District (2020)

Case Nos. 2020010423 & 2020060184

- The Complaint alleged in part that the District failed to implement Student's individualized education program by failing to provide appropriately tailored special education or related services to Student from March 18, 2020 (when the closure began), until May 7, 2020 (when the amended complaint was filed).
- The District argued that "it complied with state and federal mandates and provided Student's education using appropriate alternative supports and services given the school closure."

Student v. Norris School District (cont'd)

- The Office of Administrative Hearings held that District “was obligated to ensure that it provided Student with the special education and related services identified in Student’s IEP developed under IDEA to the extent possible, even if direct delivery of those services and supports was delayed or required modification by government directives. Because it did not do so, [the District] denied Student a FAPE from March 23, 2020 until May 7, 2020. (*Van Duyn, supra*, 502 F.3d at p. 822.)”

Student v. Norris School District (cont'd)

- “Student also proved that, during the relevant time, [the District] committed procedural violations that significantly impeded Parent’s opportunity to participate in the decision-making process in Student’s alternate educational program. (*Rowley*, supra, 458 U.S. at p. 205; 20 U.S.C. § 1415(f)(3)(E)(ii); see Ed. Code, § 56505, subd. (f)(2); *Target Range*, supra, 960 F.2d at p. 1484.)”

Student v. Norris School District (cont'd)

- District “was obligated to provide Parents with prior written notice if it proposed to change Student’s placement or provision of FAPE. (20 U.S.C. § 1415(b)(3). [The District] should have sent Parents prior written notice explaining how [the District] proposed to change or modify Student’s IEP as an alternate mode of delivery of instruction during the school closure. Although [the general education teacher] reached out to [the District] members of Student’s IEP team for additional guidance and materials, [the District] did not send a prior written notice to Parents, **specifically relating to Student**, before May 7, 2020.”

Student v. Norris School District (cont'd)

- The District “also should have held an IEP meeting, virtually if not in person. The CDE noted in its April 9, 2020 New Guidance, at Point 1, ‘there may be instances when amending the IEP to reflect the change to distance learning might be necessary and or appropriate.’ (CDE Special Education Guidance, Point 1 (April 9, 2020); 20 USC § 1414 (d)(4)(A); 20 USC § 1414 (d)(3)(D); 34 C.F.R. § 300.324.) Here, scheduling an IEP team meeting was appropriate to allow the entire IEP team to consider with Parents alternate methods of delivery of Student’s services, particularly because Parents were struggling to deliver all of the instructional materials provided by [the District] to Student.”

Student v. Norris School District (cont'd)

- The District's "failure to hold an IEP team meeting, in combination with its failure to send specific prior written notice to Parents, significantly impeded Parents' opportunity to participate in the decision-making process regarding Student's alternate educational program during the school closures. (20 U.S.C. § 1415(f)(3)(E)(ii); Ed. Code, § 56505, subd. (f)(2); *Target Range*, *supra*, 960 F.2d at p. 1484.)"

Student v. Norris School District (cont'd)

- “In total, for November 27, 2018 until May 7, 2020, Student’s operative IEP provided for 2,360 minutes of specialized academic instruction by a resource teacher based upon 59 weeks at 40 minutes a week. Student did not establish through credible evidence how much of the approximately 2,360 minutes of specialized academic instruction Student missed before May 7, 2020. However, the evidence established that Student accessed the academic materials provided by [the general and special education teachers] during the COVID-19 closure, with Parent’s help. Student also made some academic progress during the 2018-2019 and 2019-2020 school years, which justifies reducing compensatory academic hours by a small amount. ”

Student v. Norris School District (cont'd)

- “In addition, for Issue 6, Norris shall convene an IEP meeting, virtually or in person, whichever is safe and feasible. The IEP team shall develop an appropriate alternative temporary distance learning plan for Student consistent with the intent of Student’s January 22, 2020 IEP, and updated present levels of performance, until Student can return to the school campus for in-person instruction. Any agreements shall be documented as an amendment to Student’s January 22, 2020 IEP.”

Student v. Long Beach Unif. Sch. Dist.

(2020) OAH Case No. 2019100147

- The due process complaint alleged a number of issues, including:
 - “11. Did Long Beach deny Student a FAPE by failing to implement the consented to IEP services after March 13, 2020?”
 - “12. Did Long Beach deny Student a FAPE by failing to convene an IEP team meeting to discuss implementation of services during school closures in March 2020?”

Student v. Long Beach Unif. Sch. Dist.

Failure to timely convene IEP meeting

- Parent's advocate requested an IEP team meeting in writing on February 18, 2020 to review independent educational evaluation results.
- On February 20, 2020, the District proposed three IEP team meeting dates. When Parent did not respond to Long Beach regarding the three proposed dates, the District proposed nine alternative dates for Parent's selection on February 26, 2020.
- Student did not respond until March 13, 2020, the date Long Beach announced the COVID-19 related school closure.

Student v. Long Beach Unif. Sch. Dist.

Failure to timely convene IEP meeting

- The CDE's March 20, 2020 guidance tolled the time requirement for holding IEP team meetings, and "the proverbial clock stopped on March 16, 2020, the date of Long Beach's COVID-19 related school closure. By March 16, 2020, Long Beach still had three days to timely hold the IEP team meeting Parent requested on February 18, 2020, and comply with Education Code sections 56343.5, and 56043 (f)(1)."

Student v. Long Beach Unif. Sch. Dist.

Failure to timely convene IEP meeting

- “Under government guidelines, Long Beach resumed school when it resumed direct teaching to all students by videoconference on April 23, 2020, despite not having returned to on-site learning.
- “As of April 23, 2020, the CDE’s tolling under its March 20, 2020 guidance stopped, and Education Code’s 30-day timeline started again.”

Student v. Long Beach Unif. Sch. Dist.

Failure to timely convene IEP meeting

- “Although failing to hold a timely IEP meeting was a procedural violation, Student did not prove the three-day delay in holding an IEP meeting deprived Student’s educational benefits, impeded her access to a FAPE, or significantly impeded Parent’s opportunity to participate in the decision-making process.”

Student v. Long Beach Unif. Sch. Dist.

Failure to convene meeting to discuss IEP during closure

- “Student also did not prove that Long Beach was required to convene an IEP team meeting to discuss implementing Student’s IEP after March 16, 2020. CDE suggested that an IEP team meeting may be needed during the COVID-19 related closures if an IEP needed changing. (See, CDE Guidance, (April 9, 2020), *supra*, at Point 1.) Long Beach did not need to convene an IEP team meeting because Student did not show at hearing that Student’s IEP needed changing because of the COVID-19 related closures.”

Student v. Long Beach Unif. Sch. Dist.

Failure to implement

- “When a local educational agency offers distance learning for instructional delivery in lieu of regular classroom instruction during a school site closure for students, it must also provide equitable access to those services for students with disabilities. A local educational agency must create access to the instruction, including ‘planning for appropriate modifications or accommodations based on the individualized needs of each student and the differences created by the change in modality such as a virtual classroom.’ (CDE Guidance, (April 9, 2020), *supra*, at Point 2). Educational and support services provided should be commensurate with those identified in the IEP for each student to ensure educational benefit. (*Ibid.*)”

Student v. Long Beach Unif. Sch. Dist.

Failure to implement

- “Minor failures by a school district in implementing an IEP should not automatically be treated as violations of the IDEA. (*Van Duyn v. Baker School Dist.* (9th Cir. 2007) 502 F. 3d 811, 821 (*Van Duyn*).) Rather, a material failure to implement an IEP violates the IDEA. (*Id.* at p. 822.) ‘A material failure occurs when there is more than a minor discrepancy between the services a school provides to a disabled child and the services required by the child’s IEP.’ (*Id.* at p. 822.)”

Student v. Long Beach Unif. Sch. Dist.

Failure to implement

- “[T]he materiality standard does not require that the child suffer demonstrable educational harm in order to prevail.’ (*Id.* at p. 822.) ‘We also emphasize that nothing in this opinion weakens schools’ obligation to provide services “in conformity with” children’s IEPs.” ’ (*Id.* at p. 822.) In *N.D. v. Hawaii Dept. of Education* (9th Cir. 2010) 600 F.3d 1104 (N.D.), the Ninth Circuit Court of Appeals explicitly found that school closures related to a fiscal crisis did not constitute a change of placement.”
- “Long Beach did not implement any portion of Student’s October 2019 IEP from March 16, 2020 through April 9, 2020, or from April 20, 2020 through April 22, 2020.”

Student v. Long Beach Unif. Sch. Dist.

Failure to implement

- “As of April 23, 2020, Long Beach’s moderate to severe special day program teacher provided a three to four-hour blend of self-learning and direct teaching online by videoconference. Direct teaching was approximately one and a half hours and based on the moderate to severe special day class curriculum. Self-learning included completing activities and work assigned. The delivery model blend of self-learning and direct teaching of the moderate to severe special day class curriculum was similar to the specialized academic instruction on Student’s October 2019 IEP. Student did not show that this delivery model was inappropriate or materially different from her October 2019 IEP offer.”

Student v. Long Beach Unif. Sch. Dist.

Failure to implement

- “The next inquiry is whether four hours of blended instruction including one and a half hours of direct teacher instruction constituted material implementation of Student’s October 2019 IEP. (*Van Duyn, supra*, 502 F. 3d at 821.) Student’s October 2019 IEP specified five hours of specialized academic instruction. Long Beach’s implementation of four hours of blended instruction was 80 percent of Student’s five hours of specialized academic instruction offered in her October 2019 IEP. **Long Beach denied Student a FAPE because it did not implement 20 percent of Student’s specialized academic instruction for three school days from April 23, 2020 to April 28, 2020.**”

Student v. Long Beach Unif. Sch. Dist.

Remedies

- “Long Beach shall fund 45 hours of after-school speech therapy services.... .
- “Long Beach shall contract with the non-public agency selected by Parent... to provide the speech therapy services.
- “... Long Beach shall fund Lindamood-Bell’s intensive visualizing and verbalizing program of four hours per day for up to a total of ten weeks. Long Beach shall also fund assessments required by Lindamood-Bell...

Student v. Long Beach Unif. Sch. Dist.

Remedies

- “Within 10 school days of Student’s return to on-site instruction, Long Beach shall initiate a functional behavior, an occupational therapy, and an assistive technology assessment of Student by providing Parent with an assessment plan.
- “Any compensatory service time awarded by this Decision must be used by June 30, 2022. All unused hours remaining on July 1, 2022 shall be forfeited.
- “All other requests for relief are denied.”

What are the takeaways from *Norris* and *Long Beach*?

- In *Norris*, the importance of providing provide notice of the distance learning program.
- In *Long Beach*, the importance of implementing IEP minutes.

“Defensibility of ECP/DLP”

- What is the standard of legal sufficiency of a ECP/DLP that is developed during an IEP meeting?
 - Must it provide a student a free appropriate public education? Must the ECP/DLP meet procedural and substantive appropriateness standards?
 - If the ECP/DLP identifies service levels, does it thereby invite substantive scrutiny?
 - If the ECP/DLP identifies service levels less than the nonemergency (“real FAPE”) service levels, is it inappropriate on its face?
- Does *Norris School District* stand for the proposition that a local educational agency may unilaterally change a student’s program during the pandemic as long as written notice is provided?

2020-21 FAPE offer

SPECIAL EDUCATION and RELATED SERVICES

Service: <u>Specialized Academic Instruction</u>	Start Date: <u>8/4/2020</u>	End Date: <u>8/4/2021</u>
Provider: <u>District of Service</u>	<input type="checkbox"/> Ind <input checked="" type="checkbox"/> Grp <input type="checkbox"/> Sec Transition	
Duration/Freq: <u>1210</u> min x <u>1</u> Totaling: <u>1210</u> min served <u>Weekly</u>	Location: <u>Separate classroom in public integrated facility</u>	
Comments: <u>SDC; Kyrstalan will be with general education peers for recess, lunch, Physical Education, library, and Social Studies/Science.</u>		
Service: <u>Occupational therapy</u>	Start Date: <u>8/4/2020</u>	End Date: <u>8/4/2021</u>
Provider: <u>District of Service</u>	<input checked="" type="checkbox"/> Ind <input type="checkbox"/> Grp <input type="checkbox"/> Sec Transition	
Duration/Freq: <u>30</u> min x <u>1</u> Totaling: <u>30</u> min served <u>Weekly</u>	Location: <u>Separate classroom in public integrated facility</u>	
Comments:		
Service: <u>Language and speech</u>	Start Date: <u>8/4/2020</u>	End Date: <u>8/4/2021</u>
Provider: <u>District of Service</u>	<input type="checkbox"/> Ind <input checked="" type="checkbox"/> Grp <input type="checkbox"/> Sec Transition	
Duration/Freq: <u>30</u> min x <u>55</u> Totaling: <u>1650</u> min served <u>Yearly</u>	Location: <u>Separate classroom in public integrated facility</u>	
Comments:		

Emergency Conditions Plan/DLP

At this time the district is offering the following services in the mandated virtual instructional model:

During the current emergency conditions resulting from the COVID-19 pandemic, the District will implement [REDACTED] Specialized Academic Instruction, related services, accommodations, and supplementary aids and services as listed in the last agreed upon and implemented IEP to the extent appropriate and feasible under the circumstances. These supports and services will be provided in the following ways if [REDACTED] is receiving solely virtual learning:

- 1080 SAI minutes weekly – through live, virtual interactive classroom instruction with the teacher, goal-focused instruction with staff, and guided work time with staff*
- LSH services - 30 minutes x 2 sessions weekly as outlined on the IEP through live, virtual interactive therapy sessions with service providers*
- OT services - 30 minutes x 30 sessions yearly as outlined on the IEP through live, virtual interactive therapy sessions with service providers.*

If [REDACTED] receives instruction through a hybrid attendance model once the Governor's virtual learning mandate is lifted, she will receive her IEP supports and services exactly as written on her IEP on physical school attendance days (Tuesday – Friday, regular full day school attendance) and on Mondays during school sessions in the home through live, virtual support from school staff.

FAPE vs. ECP/DLP

- Difference between the service levels of the “real FAPE offer” and the ECP/DLP is 130 min/week of SAI.
- Speech and OT service minutes are the same, but delivered remotely.
- Unclear what general education mainstreaming will look like.

Defensibility of Distance-Learning Program via Prior Written Notice

- If a district provides parents a PWN that describes a distance-learning program which reduced the service minutes during distance learning, and further assume that the district materially implemented that program — is this legally defensible?
 - Is there an issue of denial of parent participation via a unilaterally determined program?
 - Does SB 98 help?

Preparing the Case

- What documents do you need to defend the district?
 - IEP
 - PWN
 - Implementation logs
 - Progress reports
- Who are your witnesses?
 - Case carrier
 - Service providers
 - Parents
 - Student

Identifying an Efficient Settlement Point

- It's unclear whether judges are ordering minute-for-minute compensatory education.
- So, how to calculate what relief might be ordered? (Shouldn't the relief calculation in fact be the services necessary to make the student whole? Isn't this what IEP teams are being asked to calculate?)
- Can "learning loss" program options be used to help with the "compensatory" determination?

Thank You

For questions or comments, please contact:

{ Adam J. Newman, Partner
(562) 653-3200
anewman@aalrr.com }

aa/rr

Atkinson, Andelson
Loya, Ruud & Romo
A Professional Law Corporation

Disclaimer



LEARNING LOSS AND LEARNING RECOVERY (COMPENSATORY EDUCATION)

Jan E. Tomskey



Overview . . .

- Federal and State Guidance on Compensatory Education Determinations Due to COVID-19 School Closures
- Learning Loss or Compensatory Education
- Prepare IEP teams
- Proactive Steps



I.

Federal and State Guidance on Compensatory Education Determinations Due to COVID- 19 School Closures



U.S. Dept. of Ed.- Q and A's -3/12/20

- Following school closure or the exclusion of a student with a disability as a result of COVID-19 and after a return to in-person instruction, IEP teams should:
 - make an individualized decision
 - **whether** compensatory services are needed under applicable requirements
 - including to make up for any skills that may have been lost

(Questions and Answers on Providing Services to Children With Disabilities During the Coronavirus Disease 2019 Outbreak, A-1 & A-3 ([US Dept. Ed.](#) March 12, 2020) 76 IDELR 77.)



CDE – Special Ed Guidance - 3/20/20

...Given the unprecedented situation created by the threat of COVID-19, exceptional circumstances may affect how a particular service is provided under a student's IEP. In such a situation, the IEP team will need to make individualized decisions regarding **whether** compensatory services are required when the regular provision of services resumes."

(<https://www.cde.ca.gov/ls/he/hn/specialedcovid19guidance.asp>.)



CDE – Special Ed Guidance - 3/20/20

- Once the regular school session resumes, LEAs should plan to make
 - **individualized determinations,**
 - **in collaboration with the IEP team,**
 - regarding **whether or not compensatory education and services may be needed** for a student.
- Educational need can be measured by;
 - assessing whether the student continued **making progress in the general education curriculum or alternative course of study** specified in their IEP; or
 - **Making progress toward meeting their IEP goals;** and/or
 - **if any regression occurred** during the period of school site closure.

(<https://www.cde.ca.gov/ls/he/hn/specialedcovid19guidance.asp>.)



II.

Learning Loss or Compensatory Education



Compensatory Education Defined

- Compensatory Education is a term generally used to describe the equitable remedy for the denial of a student's right to a FAPE.
- Compensatory Education is ordered as a result of either non-compliance or the demonstration of fault at a due process hearing.



Comp. Ed. – *Van Duyn* Material Failure

- Comp ed is awarded if there is a material failure to implement an IEP; more than a minor discrepancy between the services a school provides ... and the services required by the child's IEP
 - E.g., failing to provide 5 of the 10 hours per week of math tutoring on an IEP
 - Does not require proof that “the child suffer demonstrable educational harm to prevail”
 - However, educational progress, or lack there of, may demonstrate whether failure to implement was material



Learning Loss or Compensatory Education

- Reframing “compensatory education” as learning loss—esp for IEP team discussions--allows school districts to acknowledge the impact of the pandemic (on all students) without admitting an intentional denial of FAPE
- Being proactive about learning loss can help build trust with parents.



Train your IEP Teams



- Because the USDOE, OCR, and CDE have determined that decisions related to whether compensatory or make up services are warranted should be made by IEP teams, it is going to be critical that we train our teams how to address the issue



Considerations



- Move up triennial re-assessments to take place as soon as possible following a return to in-person instruction
- Propose assessment regarding new concerns that may have emerged
- Even if full re-assessment is not possible, carefully prepare for first meeting following return to in-person instruction
- Case manager/team should have clarity regarding what occurred during distance learning for the student, and why (next slide)



Be Prepared!



- What services were provided to the student during remote learning?
 - Was the entire IEP implemented?
- Was the student able to access the services and instruction provided?
- Was the student made available?
- What accommodations/adjustments were made to facilitate engagement?
- What parent input was received?



Be Prepared!



- Be clear about progress or regression on goals, and the student's present levels of academic achievement and functional performance
- Services may need to be increased, or additional services may need to be added, to address the student's current needs
- If the team concludes that additional services may need to be provided for a discrete period of time "to support learning recovery," CLEARLY state temporary nature of services on the IEP, including the service page



Being Proactive Now



- Consider tutoring and online supplemental services currently in place
- Determine if supplemental services can be put in place before or after school or during the summer
- Address concerns thoughtfully during IEP meetings and adjust the IEP/DLP as needed
 - Partner with Parents during the closures
- Keep track of services provided and missed and report progress—document, document, document





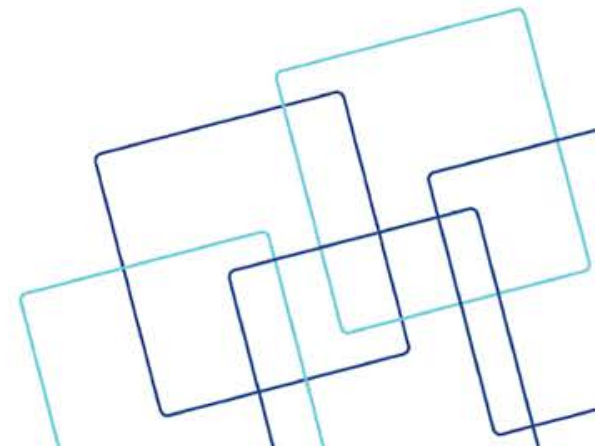
*The Physical Reopening Landscape:
What is on the Horizon (Today ...)*

Presented by: Sarah L. Garcia

Partner

SELPA Association Legal Panel

February 9, 2021



Physical Reopening Issues

Cohorting

Health and Safety



Sampling of Significant Changes in January 14, 2021 CDPH Guidance

- New definition for when a school is considered “reopened.”
- New criteria for when a closed school can reopen.
- COVID-19 School Safety Plan (“CSP”) Required?
- State Testing Cadence Recommended or Required?
- Guidance on outbreaks and re-closing schools

Changes to rules regarding:

- Face coverings
- Distancing of students in classroom
- Ventilation
- Restrictions on Band/Choir
- Health Screening Exclusion of SPED students
- Handling Confirmed/Suspected Cases

Safe Schools for All (*Proposed* Budget Legislation)

- Additional funding incentives to provide in-person instruction
- Any District not yet required to provide in-person instruction must provide small cohort services for specific student populations and students in elementary grades the District is not yet providing hybrid in-person instruction.



President Biden's *Proposed* "American Rescue Plan"

Proposed plan to open the majority of TK-8 schools within the first 100 days of his Administration (by April 30, 2021).

- \$130 billion broad financial package to help with reducing class sizes, improving ventilation, more PPE, a nurse at every school, hiring more janitors and counselors, and address student needs.
 - School access to FEMA Disaster Relief Fund resources.
- \$5 billion specifically for new learning programs and students hit hardest by the pandemic.
- Return of and expanded COVID-19 leave.
- Additional funding to protect educators from lay-offs, provide more frequent testing at schools, and support local governments.

First Priority: The Physical, Mental, and Educational Safety and Wellbeing of Students and Staff

61



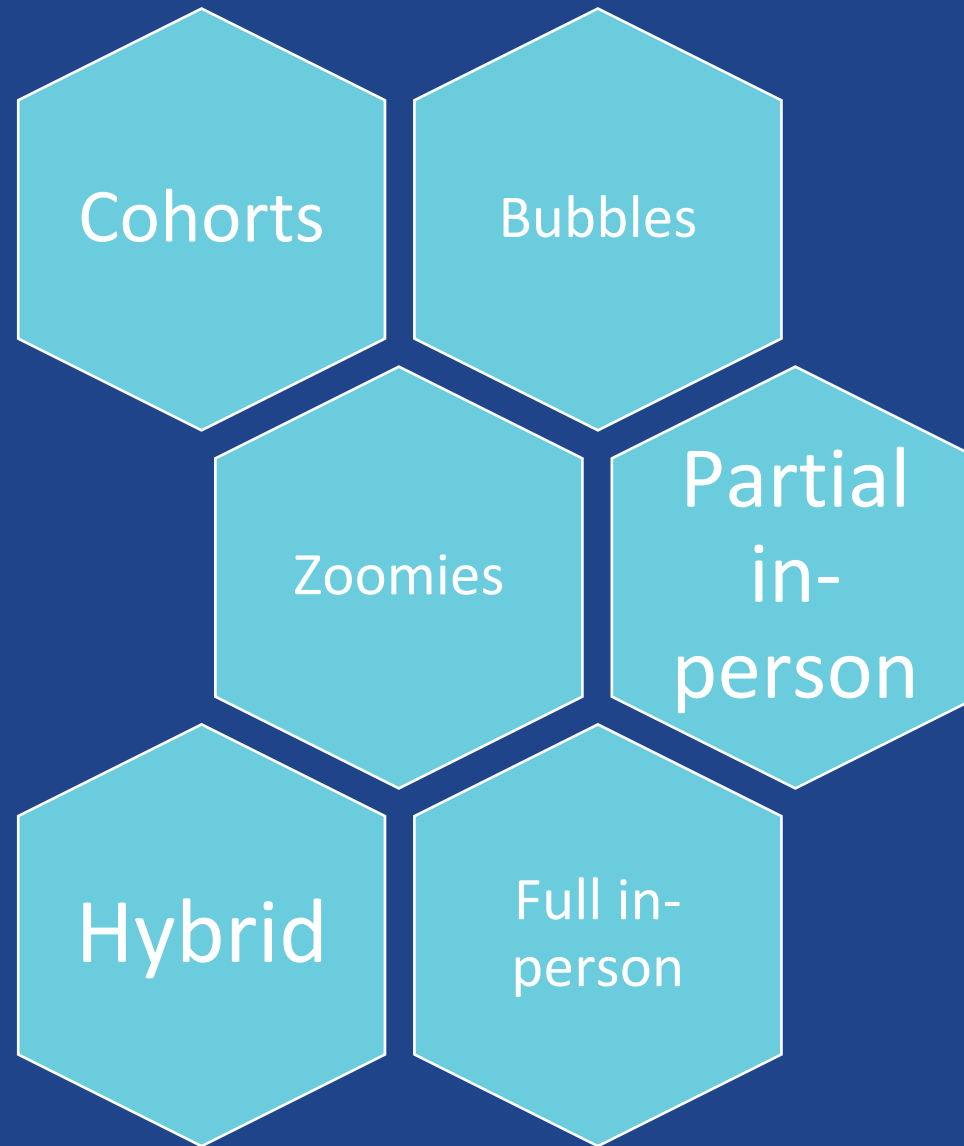
Instructional Models

January 14, 2021 Definition for “Open” or “Reopen”

The school must have given all students in at least one grade the option to return for in-person instruction for at least part of the school-week to be considered to “open” or “reopen.”

If a school district has a phased reopening of their schools, the schools in that district that did not open for in-person instruction may not reopen until the county meets the reopening criteria.

If the school previously received a waiver and did not yet reopen, it must delay reopening until the county meets the reopening criteria.



Equitable Decision-making

- ☐ When to return and how?
- ☐ Student Equity Issues
- ☐ Guidance and Orders from State and Local Public Health Departments
- ☐ Address Learning Loss
- ☐ Closures, Quarantines, Self-Isolation
- ☐ Liability Issues
- ☐ Medical Vulnerabilities
- ☐ Transportation
- ☐ Role of Classified Staff
- ☐ Student Schedules and Phases
- ☐ Small Cohorts/Bubbles/Pods
- ☐ Concurrent with DL
- ☐ Virtual Academy Programs
- ☐ Voluntary return for students? What about Staff?
- ☐ Dictated by Science, the State, County Departments of Public Health, School District
- ☐ Facilities
- ☐ Equipment

Full In-Person Return

- What did we learn from the Small Group/Cohort/Hybrid Model?



Cohorting

January 14, 2021 Reopening Framework Guidance

Consolidated, updated, and superseded

- July 17, 2020 Reopening Framework
- August 3, 2020 COVID-19 Industry Guidance for Schools
- Elementary Education Waiver Process
- CDPH Schools FAQ's (last updated October 20, 2020)

Not modified or superseded:

- Cohort Guidance

Equitable Cohorting Considerations

- ☐ Implementation of Service Minutes
- ☐ Equitable Access
- ☐ Staff Availability
- ☐ Facility Space
- ☐ Equipment Access
- ☐ Inclusion
- ☐ Least Restrictive Environment
- ☐ Health and Safety
- ☐ Physical Distancing



Health and Safety

Health and Safety of Students and Staff

- ☐ Face Covering (Masks, Shields, Drapes, and Accommodations for those who can wear a mask for medical reasons)
- ☐ Physical Distancing
- ☐ Hand Sanitizer and Hand Washing
- ☐ Isolation Rooms
- ☐ Classroom and Facilities Cleaning and Sanitization
- ☐ Classroom Layout for Physical Distancing
- ☐ Air Ventilation Systems
- ☐ Restrooms
- ☐ Lunch/Recess/Passing Periods
- ☐ Push in/Pull out Services
- ☐ Ingress and Egress-Signage
- ☐ Visitors
- ☐ Testing, Contact Tracing and Communication
 - ☐ Surveillance
 - ☐ Symptomatic
 - ☐ Self-Reporting
 - ☐ Regional and Free Tests
 - ☐ Temperature Checks
- ☐ Opening and Closing Protocols

Face Coverings at Schools

- Required for all children in TK-12.
- Limited, rare exceptions (medical/mental health condition; interacting with hearing-impaired individual)
- School district health team and therapists must confirm condition before alternative such as a face shield, is allowed to be worn.
- District must provide face covering to students who inadvertently fail to bring one to school or when they enter a school bus.
- District must exclude students if they are not exempt from wearing a face covering and refuse to wear one provided by the school.
- Alternates such as face shield with a drape can be used for pedagogical or developmental reasons.

Testing

Table 1. Testing Cadences with Committed Support from the State of California for K-12 schools

	Yellow CR <1.0* TP <2%	Orange CR 1-3.9* TP 2-4.9%	Red CR 4-7* TP 5-8%	Purple CR >7-13.9* TP >8%	CR >14*
Staff	Symptomatic and response testing.	Symptomatic and response testing.	Symptomatic and response testing + Every 2 weeks asymptomatic testing.	Symptomatic and response testing + Every 2 weeks asymptomatic testing.	Symptomatic and response testing + Weekly asymptomatic (PCR or twice weekly antigen testing)**.
Students K-12	Symptomatic and response testing.	Symptomatic and response testing.	Symptomatic and response testing + Every 2 weeks asymptomatic testing.	Symptomatic and response testing + Every 2 weeks asymptomatic testing.	Symptomatic and response testing + Weekly asymptomatic (PCR or twice weekly antigen testing)**.

TP = test positivity

* The case rates above are adjusted case rates.

** Weekly asymptomatic testing assumes the use of a PCR test. If antigen testing is used, testing should be at a twice weekly cadence.

Screening

Implement (not just recommended) daily visual symptom and exposure screening before leaving home.

Encourage sick students and staff to stay at home.

If excluding a student, ensure access to instruction and FAPE.



Staff Vaccines

Consider whether mandatory vaccine policy is appropriate.

Investigate Public Health partnerships for administration.

Prepare to address negotiable effects through MOU.

Evaluate requests for accommodation.



Takeaways

Equal and Equitable Access

Safety for All





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Disclaimer: These materials and all discussions of these materials are for instructional purposes only and do not constitute legal advice. If you need legal advice, you should contact your local counsel or an attorney at Lozano Smith. If you are interested in having other in-service programs presented, please contact clientservices@lozanosmith.com or call (559) 431-5600.

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Duty to Assess under the IDEA in the COVID-19 Environment

- The Individuals with Disabilities Education Act (“IDEA”) is federal law, so waivers/exceptions will ultimately need to come from Washington D.C. – Not from Sacramento.
- And there has been little latitude granted to LEAs from D.C.:
 - March 12, 2020, Dept. Ed. “Q&A Providing Services...”
 - “...generally more than 10 consecutive days...”
 - April 27, 2020, U.S. Secretary of Ed., Betsy DeVos’ Report to Congress.
 - “...[crickets]...”
 - July 6, 2020, OSERS/OSEP Q&A Part C Eval. Timelines.
 - Case-by-Case? Extra time? Maybe?
 - September 28, 2020, OSEP, 7 page, 7 Q&A Part B.
 - Nothing new – the IDEA is in full effect!
 - September 28, 2020, OCR, 9 page, 13 Q&A.
 - Did we mention the IDEA is in full effect and do not discriminate?
 - But explicitly addresses waivers – see Q&A 9.
 - October 21, 2020, OSEP Q&A Part C provision of services.
- <https://www.ed.gov/coronavirus/program-information#speced>

Duty to Assess under the IDEA in the COVID-19 Environment

- Sacramento provided some limited relief during the 2019-2020 school year regarding timelines.
 - SB 117 and CDE – when school is “closed”* the closure days did not count (like on summer/winter break).
 - See ECs 56321 and 56344.
 - But SB 98 did not continue this (very limited...) relief with the expectation that schools will be “open” either in-person (preferred) or through partial or complete distance learning...
- <https://www.cde.ca.gov/ls/he/hn/specialedcovid19guidance.asp>

Duty to Assess under the IDEA in the COVID-19 Environment

The meaning of “closed:”

- For purposes of determining compliance with special education timelines, the CDE will consider the days of school site closure as days between the pupil’s regular school session, similar to school breaks in excess of five days planned in the instructional calendar. (Ibid.) The local educational agency could also consider alternative service delivery options such as in-home service delivery, meeting with individual students at school sites, or other appropriate locations to deliver services. The CDE also encouraged local educational agencies to work collaboratively with nonpublic schools and agencies to ensure continuity of services, including moving to virtual platforms for service delivery to the extent feasible and appropriate. (Ibid.)
- *Long Beach USD* (OAH 10-12-20) No. 2019100147, pg. 45.

Duty to Assess under the IDEA in the COVID-19 Environment

The meaning of “closed:”

Long Beach closed its schools on March 16, 2020 because of the COVID-19 pandemic. Long Beach also had a scheduled April 10, 2020 holiday and spring recess from April 13, to 17, 2020; both scheduled school closures were on Long Beach’s 2019-2020 school year calendar. Long Beach sent a notice to all parents and a prior written notice to all special education parents on April 16, 2020, informing parents that Long Beach would resume direct teaching and offered a total of three to four-hour blend of teacher directed remote learning, and self-learning beginning April 23, 2020. Because of COVID-19, Long Beach **extended the school closure of on-site teaching from March 16, 2020 through June 11, 2020**, the end of the 2019-2020 school year.

- *Long Beach USD* (OAH 10-12-20) No. 2019100147, pg. 46.

Duty to Assess under the IDEA in the COVID-19 Environment

The meaning of “closed:”

- Under government guidelines, Long Beach resumed school when it resumed direct teaching to all students by videoconference on April 23, 2020, despite not having returned to on-site learning. As of April 23, 2020, the CDE’s tolling under its March 20, 2020 guidance stopped, and Education Code’s 30-day timeline started again. Long Beach had until April 25, 2020, to timely hold the Parent requested IEP team meeting. Long Beach did not hold the Parent requested IEP team meeting before Student filed her amended complaint on April 28, 2020. Therefore, Long Beach was three days late in holding the IEP meeting as of April 28, 2020.
- *Long Beach USD* (OAH 10-12-20) No. 2019100147, pg. 47.

Duty to Assess under the IDEA in the COVID-19 Environment

The meaning of “closed:”

- I am aware of at least one (but rumor around town is there have been more issued...) recent (January 15, 2021) compliance complaint decision from CDE addressing the issue of conducting an initial assessment and convening an IEP meeting that only counted the days the LEA was “closed” and not providing any distance learning, which resulted in the LEA being found out of compliance.
 - This reasoning penalizes LEAs that quickly made the pivot from in-person to distance learning...

Child Find in the COVID-19 Environment

- LEAs continue to have “child find” responsibilities.
- General education students that had been struggling pre-COVID-19, but making some educational progress in school, may now be falling significantly behind with distance learning.
 - And students with an IEP/Section 504 plan may have new areas of educational need to be addressed.
- Student Study Team – Zoom, telephone, in-person...
 - Include the parent!!!
 - Multi-Tiered System of Supports (“MTSS”) – interventions prior to referring for IDEA evaluation.
 - Contemporaneous documentation will be the best defense.
 - Initial assessment referrals that are delayed, but then result in eligibility, consider compensatory education discussion at initial IEP meeting.

Triennial Evaluation – COVID-19

- Is additional standardized assessment data needed to develop the student's IEP to allow the student to receive a FAPE?
 - Record review, work samples, behavioral/adaptive rating scales, etc.
 - Consider “triennial reevaluation determination” SEIS worksheet and not conduct the in-person standardized assessment.
 - See EC 56381(d) – requires parent agreement and consent.
 - Consider completing all non-in-person assessments, reviewing at an IEP meeting, then agreeing to conduct a follow-up assessment (in the specific area of need that requires more information) when “things are normal.” * **Observation**
 - This may merit a compensatory education discussion depending on the results of any delayed assessments.
 - Parents can agree (in writing please) to delay an assessment.

California Association of School Psychologists (“CASP”)

- To put it simply, CASP rocks! <https://casponline.org/>
- CASP has provided extensive guidance to its members that is available to the general public. The guidance has general applicability for all assessors.
 - April 9, 2020, CASP Today – publication for CASP members.
 - April 27, 2020, FAQ – 7 Questions and Answers.
 - Reliability v. Validity - “Testing of limits”
 - Read the test manual/instructions!
 - “Virtual assessment” (AKA telehealth testing)
 - Telehealth testing that has been validated requires a trained on-site proctor to be in the room with the student to:
 1. Verify the positioning and functioning of the technological requirements;
 2. Verify the ambient environmental conditions;
 3. Verify confidentiality/privacy condition; and
 4. Properly proctor the exam.

California Association of School Psychologists (“CASP”)

- August 6, 2020, One-page summary with embedded links.
 - Example of “clean room” assessment setting.
 - Cautionary statements for reports.
 - Four-page “Recommended Resources for Psychoeducational Assessment During COVID-19.”
- August 15, 2020, comprehensive 14 page document with lots of suggestions and guidance including safe in-person assessment practices. **Series # 1.**
- CASP Series #2 – Updated Assessment Guidance & Four Specific Eligibility Areas Guidance – dated 10-8-20 (but posted on CASP website on 10-20-20).
- And not from CASP, but LEAs may want to consider something like:
 - COVID-19 Parent/Guardian Notice and Acknowledgement Special Education Assessments During the COVID-19 Pandemic

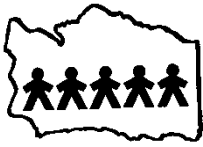
In-Person Assessment Considerations

- Make sure the guidance from your respective County Local Health Officer allows for in-person assessment.
- Work with your assessors (and their union...) to address safety concerns.
- Consider parent completing (and signing) an acknowledgement and COVID-19 screening form - check with your SELPA (wait, that is you!) or your attorney for a model document.
- The CASP example of “clean room” assessment setting provides a good blueprint and comes with pictures!
- Try and minimize in-person assessments that require sharing of materials with students.
 - Q-Interactive
 - Approximately 20 assessments (WISC-V, WIAT-III, CELF-5, etc.) - on two iPads – one for the assessor and the other for the student.
 - <https://www.pearsonassessments.com/professional-assessments/digital-solutions/q-interactive/about.html>
- The assessor will need to address in the report any deviations in the assessment process, observation, etc., through cautionary statements in the report (see CASP models as an example).



Questions?





Santa Barbara County
Special Education Local Plan Area
Joint Powers Agency

SANTA BARBARA COUNTY SPECIAL EDUCATION LOCAL PLAN AREA
JOINT POWERS AGENCY BOARD
MINUTES OF FEBRUARY 1, 2021 REGULAR MEETING
Due to the COVID-19 Crisis this meeting was held via Zoom
12:00 p.m.

***There will be no physical location for this meeting due to COVID-19 and Governor Newsom's Executive Order N-29-20 regarding Shelter in Place.**

I. PUBLIC SESSION

A. Call to Order

The regular meeting of the Santa Barbara County Special Education Local Plan Area (SBCSELPA) Joint Powers Agency Board was called to order by Anne Hubbard at 12:01 p.m. via Zoom (Meeting ID: 936 3574 0423).

B. Roll Call

Lindsay MacDonald took membership roll call.

Members Present: Amy Alzina, Clerk

Antonio Garcia

Anne Hubbard, Chairperson

Randy Haggard, Vice-Chair

Hilda Maldonado

Luke Ontiveros

Susan Salcido

Members Absent: Trevor McDonald

Others Present: Ray Avila, SBCSELPA Executive Director and Secretary to the Board, and other SBCSELPA staff:

Lindsay MacDonald, SBCSELPA Executive Secretary

Jennifer Connolly, SBCSELPA Coordinator

Kim Hernandez, SBCSELPA Business Official

Claudia Echavarria, SYVSEC, Director of Special Education

Kirsten Escobedo, Asst. Supt. of Special Education, SBCEO

Rachel Fauver, SBCEO, Director, School & District Support

John Schettler, SBUSD Director of Special Education

Beverly Sherman, SYVSEC, Coordinator of Special Education

C. Flag Salute

Anne Hubbard led the assembly in the Pledge of Allegiance.

SBCSELPA JPA BOARD
MINUTES OF FEBRUARY 1, 2021 REGULAR MEETING

D. Welcome Guests

Ray Avila welcomed and thanked Claudia Echavarria and Beverly Sherman from SYVSEC and Kirsten Escobedo from SBCEO who regularly join the JPA meetings. Ray also introduced John Schettler, Special Education Director from SBUSD who will be doing a presentation for the JPA Board. Lastly, Rachel Fauver, SBCEO, Director, School & District Support, joined the meeting as guest. There were no other guests.

E. SBCSELPA Executive Director's Report

Ray Avila highlighted an item in his Executive Director's Report related to "Legislative Bills to Watch," putting a spotlight on AB 126 (E. Garcia) Bill, this is around more support and resources for family empowerment centers. This bill didn't make it through last legislative year, but it is back on the calendar for this year, the State SELPA Association is very much in support of this bill, we are fortunate to have Alpha Resource Center here in Santa Barbara County. Ray commented that he will keep everyone posted on the legislative actions towards that bill. The Board was satisfied; there were no questions or comments.

II. PUBLIC COMMENTS

There were no public comments.

III. APPROVAL OF ADDITIONAL EMERGENCY ITEMS

There were no additional emergency items presented.

IV. APPROVAL OF ACTION AGENDA

Recommendation: The JPA Board approve the Action Agenda as presented.

Motion to Approve: Randy Haggard Second: Antonio Garcia

Vote: 7 – 0 The motion passed with JPA Board Members Amy Alzina, Antonio Garcia, Randy Haggard, Anne Hubbard, Hilda Maldonado, Luke Ontiveros, and Susan Salcido voting in favor; none opposed.

V. CONSENT AGENDA The JPA Board took action on Items A - C:

A. Minutes of December 7, 2020 Regular Meeting

B. Ratification of Payment of Claims: 01-632844 - 01-632863, 01-6633869 - 01-633878, 01-634759 - 01-634769, 01-635685 - 01-635712.

C. 2020-21 Nonpublic Agency (NPA) Master Contract Rates

1. Exhibit A Rates Sheet: Platinum Teletherapy

Recommendation: The JPA Board approve Consent Agenda Items A through C as presented.

Motion to Approve: Amy Alzina Second: Luke Ontiveros

The Board was satisfied; there were no questions or comments.

Vote: 7 – 0 The motion passed with JPA Board Members Amy Alzina, Antonio Garcia, Randy Haggard, Anne Hubbard, Hilda Maldonado, Luke Ontiveros, and Susan Salcido voting in favor; none opposed.

SBCSELPA JPA BOARD
MINUTES OF FEBRUARY 1, 2021 REGULAR MEETING

VI. PRESENTATIONS

A. SBUSD Significant Disproportionality, Presenter John Schettler

Anne Hubbard introduced John Schettler, SBUSD Director of Special Education, to present on the topic of significant disproportionality, which is something everyone struggles with and the Board members specifically requested this presentation at a previous board meeting. John presented information related to Significant Disproportionality and the journey that SBUSD has been on regarding this topic, hopefully this will be a cautionary tale for everyone and not something that you will have to go through yourselves. He began by reviewing the basics of what disproportionality is, overrepresentation of students in special education and discipline by race/ethnicity, Federal monitoring requirement from IDEA. John's presentation reviewed the impacts of overidentification; causes of significant disproportionality; disproportionality monitoring; being identified as significantly disproportionate; funding implications; programmatic improvement process and applying a cultural lens throughout the 4-phase process. He concluded the presentation highlighting key takeaways, specifically, looking at disproportionality in years 1 and 2 differently; the importance of general and special education collaboration; and culturally responsive MTSS.

Amy Alzina asked about English Language (EL) learners being identified and that subgroup really being the main group for overidentification, now that these EL learners have been in remote learning for a year now and we know that there is some learning loss there, how did John address that in their plan. John responded that they did not really speak to remote learning, distance learning, COVID, none of that played into the plan development. John understands that we all have a concern that there is going to be an increased number of special education referrals when we get on the other side of this because students have not been learning at the rate we want them to, but that really didn't factor into SBUSD plan when they wrote it. Hilda Maldonado asked John to show some of their action steps, what specifically they are planning to do. Amy additionally inquired if they had laid out a specific criterion for when they move forward with assessment versus just SST process knowing now that they have both EL and remote learning with a learning loss. John responded that they are not that detailed in the plan but 2 of their big activities address this and shared in detail what this is. Hilda also added that she is also looking at the rollout of ELD standards for all teachers. Lastly, Hilda also shared that Ray connected SBUSD with a consultant, Deborah Montoya out of Imperial County, she does excellent work in this area and she will be working with them in the implementation work. The Board was satisfied; there were no further questions or comments.

B. Governor's Budget, Presenter Kim Hernandez

Kim Hernandez, SBCSELPA Business Official, presented information on the Governor's Budget, specifically the items that were related to Special Education. She began by reminding the JPA Board of the State Budget Timelines, right now we are looking at the January budget that is for next year, 2021-22 school year budget. It is important to remember at this point it is **only a proposal**, the Governor must submit a balanced budget by January 10th, then both Houses of the Judiciary review the budget and hold hearings until May, essentially the budget morphs and changes as time passes. Next is the May Revise, which is still a proposal, Legislature must then pass the budget by June 15th. Lastly, between June 15 – July 1 the Governor will sign the final budget and then it is enacted. Kim highlighted the 7 items of the Governor's Budget that have a direct impact on Special Education and reviewed each one briefly. Kim then discussed the Capitol Advisors workshop and reviewed the 4 items that were directly related to Special Education and in the

SBCSELPA JPA BOARD
MINUTES OF FEBRUARY 1, 2021 REGULAR MEETING

B. Governor's Budget, Presenter Kim Hernandez *(continued)*

Governor's Budget. The main item that is going to affect us at the SELPA is the ongoing Prop 98 GF for Special Education Early Intervention Grant Program. The other key item that Kim reviewed is that there is **NO** deferral relief in 2020-21, first AB602 apportionment deferral starts in February. Kim finished the presentation by reviewing the slides of the presentation relating to the 5 other items of the Governor's Budget that would affect Special Education which include: NPS Placements; Mental Health Funding; COLA; STRS & PERS Increases; and Structural Deficits starting in 2022-23. Hilda Maldonado regarding LCFF and being a basic aide district and how that works, should she take this information from that perspective or should she take that as it is going to happen regardless to all of us. Kim responded that even a basic aide district should prepare for the funding and those sorts of things those all still would apply, Santa Barbara is in the most unfortunate situation in that there is sometimes when you are on the bubble where you go out of basic aide and into LCFF and back and forth, so it is just good to be aware of all of it. Anne Hubbard further explained to Hilda in more detail how it works to be on the bubble in regard to property taxes because her district is in Santa Barbara and she is very familiar with this situation. The Board was satisfied; there were no further questions or comments.

VII. ITEMS SCHEDULED FOR ACTION/CONSIDERATION

A. SBCSELPA Annual Audit Report for Fiscal Year Ending June 30, 2020

Recommendation: The JPA Board approve the SBCSELPA Annual Audit Report for Fiscal Year Ending June 30, 2020 as presented.

Motion to Approve: Randy Haggard **Second:** Susan Salcido

Vote: 7 – 0 The motion passed with JPA Board Members Amy Alzina, Antonio Garcia, Randy Haggard, Anne Hubbard, Hilda Maldonado, Luke Ontiveros, and Susan Salcido voting in favor; none opposed.

Kim Hernandez reviewed the SBCSELPA Annual Audit Report memo. Kim reviewed that Eide Bailey LLP is who conducted our audit this year and we are fortunate to have Kelly Kavanaugh working for them now, she used to work for SBCEO, so she is familiar how our SELPA works and how our complex funding model works. Kim further highlighted that we had a great audit, it was an unmodified report. Basically, nothing to report in regard to materials weaknesses, significant deficiencies, no findings or questions of costs, and we are qualified as a "low risk" auditee. The Board was satisfied; there were no further questions or comments.

B. Santa Barbara County Education Office (SBCEO) Regional Program Operator Request to Continue Regional Severe/Profound Program at Arellanes Jr. High

Recommendation: The JPA Board approve the SBCEO request to continue the Regional Severe/Profound Program at Arellanes Jr. High for the 2021-2022 school year, despite low enrollment, as presented.

Motion to Approve: Luke Ontiveros **Second:** Hilda Maldonado

Vote: 7 – 0 The motion passed with JPA Board Members Amy Alzina, Antonio Garcia, Randy Haggard, Anne Hubbard, Hilda Maldonado, Luke Ontiveros, and Susan Salcido voting in favor; none opposed.

SBCSELPA JPA BOARD
MINUTES OF FEBRUARY 1, 2021 REGULAR MEETING

VII. ITEMS SCHEDULED FOR ACTION/CONSIDERATION *(continued)*

B. Santa Barbara County Education Office (SBCEO) Regional Program Operator Request to Continue Regional Severe/Profound Program at Arellanes Jr. High
(continued)

Kirsten Escobedo reviewed this item, summarizing that there are 3 programs to support students with severe/profound needs in North County, all 3 serving students in grades 4 - 8. Next year it is projected that there will be 2 students in the Arellanes program so SBCEO would like to propose to keep the program open and redistribute the students among the 3 programs, a total of 18 students. In this reconfiguring they do propose to reduce one of the paraprofessional positions at Arellanes from 4 to 3 next year, this would result in a cost decrease overall for that program. Ray Avila commented that all this information was also presented to the SEAM group in January 2021 and they supported the request with the consensus to move it forward to the JPA Board for approval. The board was satisfied; there were no further questions or comments.

VIII. ITEMS FOR INFORMATION AND DISCUSSION

A. Retirement Notification from SBCSELPA Office Manager, Margaret Slater

Ray Avila informed the Board that the SBCSELPA current Office Manager Margaret Slater has announced her retirement. Ray highlighted that Margaret has been with the SELPA for almost 4 decades, her institutional knowledge and support for the SELPA staff is greatly valued and appreciated. Margaret's official retirement date is set for June 30, 2021. The notice of her retirement sparked a discussion about the current SELPA office, as we are always looking for ways to streamline and revise procedures and how we do our work which led into Item B. The Board was satisfied; there were no further questions or comments.

B. SBCSELPA 2021 Office Reorganization Proposal

Ray Avila began by reviewing the Board memo for this item and the journey that led the office to the discussion and crafting of this reorganization proposal. Ray emphasized that through this process he remained transparent with the office staff and included them and feedback from support staff in the organization. Additionally, Ray shared that they did a comparison study with other SELPAs throughout the state of California that have similar demographics and dynamics as SBCSELPA, to be sure that when proposing any new job descriptions and salary schedules it was consistent with other SELPAs throughout the state. Ray explained that he wanted to introduce this proposal now with the hopes that the Board would recommend bringing it back as an action item in March, he wanted to give the Board the opportunity to review and reflect upon the proposal that is being presented. Ray pointed out that since the SELPA did not budget for this for the current 2020-21 school year, in the proposal the request is to make promotional adjustments to current employees beginning May 1, 2021 to allow current staff to work alongside the current office manager, Margaret Slater, through June 30, 2021, which causes a budget salary increase of \$7,605.00 for the remainder of the year. However, since the proposal plans to dissolve one of the current office staff positions, the Clerical Assistant, there will be a salary decrease of \$35,236.00 for the 2021-22 budget. Ray reassured the group that in the job descriptions the new office positions will absorb the job duties of the dissolved position. The salary schedules for the new/revised job positions were presented and explained in depth by Kim Hernandez, specifically she showed a 3-year trend of what the costs would be for the new positions. Finally, Ray shared that this reorganization was not created to save a \$1, but rather to streamline and become more efficient and we are very confident in the individuals we have,

SBCSELPA JPA BOARD
MINUTES OF FEBRUARY 1, 2021 REGULAR MEETING

VIII. ITEMS FOR INFORMATION AND DISCUSSION

B. SBCSELPA 2021 Office Reorganization Proposal *(continued)*

in doing the salary comparison study we want to be competitive for future employees we may have.

Luke Ontiveros commented that he appreciated the background information that was provided, and the explanation was very helpful to be able to go through it. Luke inquired about the eliminating of the Clerical Assistant and it being subject to layoff and the connection of SELPA staff and to any protocol/negotiated agreement. Secondly, Luke felt it was wise to take advantage of this opportunity to think about efficiencies, but what has been the thought or sharing of this proposal with the larger SELPA staff going forward for consideration. Ray responded to Luke's second comment first, sharing that he wanted to share this proposal with the Board and get approval to move forward as an action item and its Rays intent to share this at the all-staff SELPA meeting next Tuesday, February 9, 2021, where he will share this with the entire staff. If Ray was to get any feedback that was of concern, he would both digest that and bring it to the Board at our next meeting. To answer Luke's first question Ray shared that SELPA is an organization that does not have a bargaining unit(s) so that does that type of conversation, further in checking with legal counsel in the past SELPA does not have to go through that traditional layoff process when eliminating a position. Randy Haggard shared that when Ray shared this proposal with Anne and himself in preparing for this meeting, he was really impressed with the thoughtful consideration that went into trying to improve efficiencies for the organization for the whole County. The Board was satisfied; there were no further questions or comments.

C. SBCSELPA Professional Development

Jennifer Connolly highlighted Professional Development opportunities available in February 2021. She also reminded everyone that the trainings are free this year and to remind staff to take the SBCSELPA up on these various offerings. The Board was satisfied; there were no further questions or comments.

D. LEA/District Costs Associated with Due Process SBCSELPA Year-to-Date Account Balances

Luke Ontiveros asked if Ray had any information or guidance as to what they should be expecting out of distance learning and what does it look like in other places where cases are already being filed, specifically in relation to the budget and planning. Ray responded that there is some anticipation and angst about future legal cost throughout the state, the good news is that 2 major class action lawsuits have already been dismissed. Ray further shared that it is not anticipated that there will be a flood of future class action lawsuits that are COVID related. In our County our LEAs are doing strong work around preventative and proactive efforts to eliminate any types of due process pathways. We all need to be realistic that going into the next school year, assuming we go back in person, there will be a spike in CDE complaints that could lead to due process cases. It was confirmed that this proposal will move on to an action item on the March 2021 JPA agenda. Kim Hernandez also confirmed that in preparing the Second Interim Budget for the next meeting and so she will go forward assuming that this proposal will be approved and will prepare the budget in accordance with that, Anne Hubbard concurred that she should proceed that way. The Board was satisfied; there were no further questions or comments.

SBCSELPA JPA BOARD
MINUTES OF FEBRUARY 1, 2021 REGULAR MEETING

VIII. ITEMS FOR INFORMATION AND DISCUSSION *(continued)*

E. SBCSELPA Legal Fees Year-to-Date Reserve

The Board was satisfied; there were no questions or comments.

F. Nonpublic School (NPS) Year-to-Date Placement Expenditures

The Board was satisfied; there were no questions or comments.

IX. MISCELLANEOUS AGENDA

A. Items Proposed for Future Action or Discussion

Hilda Maldonado requested to have Deborah Montoya come and do a presentation around Special Education and English Learners as we think about this potential for litigation and learning loss, it is a very vulnerable population of students that all could benefit having a presentation about. Hilda further commented that regarding professional development and in connection to her first request that she understands Janine Butterfield looks a lot at the processes to identify English Learners in SPED and it would be beneficial to have some presentations in this regard. Antonio Garcia concurred with Hilda's requests and felt it would be very beneficial, he also commented that the presentation by John Schettler was very helpful and appreciated. Additionally, Anne Hubbard concurred with both Hilda and Antonio. Ray responded that this is something we could coordinate and having our SEAM group join us for these types of presentations. There were no further items proposed for further future action or discussion.

B. Next Scheduled JPA Board Meeting: March 1, 2021, 12:00 p.m.

Via Zoom due to COVID-19

X. PUBLIC COMMENT PERIOD REGARDING CLOSED SESSION ITEMS

There were no public comments.

XI. CLOSED SESSION: The JPA Board adjourned to Closed Session at 1:24 p.m.

A. Evaluation of the SBCSELPA Executive Director

XII. RECONVENE TO PUBLIC SESSION: The Board took no action.

XIII. ADJOURNMENT

The meeting was adjourned at 1:32 p.m.

Anne Hubbard, Chairperson
Santa Barbara County SELPA

Ray Avila, Secretary
Santa Barbara County SELPA

Date

Date

Checks Dated 12/28/2020 through 01/19/2021

Check Number	Check Date	Pay to the Order of	Fund-Object	Expensed Amount	Check Amount
01-637947	01/12/2021	At&t	01-5910		155.40
01-637948	01/12/2021	Fagen Friedman & Fulfroost LLP	01-5830		1,960.00
01-637949	01/12/2021	Frontier	01-5910		1,000.34
01-637950	01/12/2021	Goleta Union School District	01-4310	214.42	
			01-5860	21,653.73	21,868.15
01-637951	01/12/2021	Hatch & Cesario	01-5830		4,641.50
01-637952	01/12/2021	Kirsty Kenny	01-5200		122.94
01-637953	01/12/2021	Leticia Leon	01-4310		22.76
01-637954	01/12/2021	Natalie Facio-Leon	01-5200		120.75
01-637955	01/12/2021	New Haven	01-5890		18,387.00
01-637956	01/12/2021	Physicians Hearing Service	01-5800		402.07
01-637957	01/12/2021	Provo Canyon School, Inc.	01-5890		41,361.00
01-637958	01/12/2021	Quest Diagnostics	01-4300		575.00
01-637959	01/12/2021	Santa Maria Jt.union High Dist	01-5830		13,500.00
01-637960	01/12/2021	Santa Maria-Bonita School Dist	01-4310	7,936.38	
			01-5800	2,309.33	10,245.71
01-637961	01/12/2021	SBCSS	01-5800		75.00
01-637962	01/12/2021	SISC III Health	01-3402		909.80
01-637963	01/12/2021	Sonova USA, Inc.	01-4300		291.87
01-637964	01/12/2021	Sparkletts	01-4300		60.20
01-637965	01/12/2021	Staples Business Credit	01-4310		63.16
01-637966	01/12/2021	██████████ NPS 2017 18 49	01-5890		1,020.88
01-637967	01/12/2021	Three Points Center	01-5890		30,800.61
01-637968	01/12/2021	U.S. Bank Equipment Finance	01-5860		504.93
01-637969	01/12/2021	Verizon Wireless	01-5910		155.62
01-637970	01/12/2021	Visa	01-4300	167.89	
			01-5860	169.00	336.89
01-637971	01/12/2021	X Tech Laser Printing Inc.	01-5860		106.82
01-638729	01/19/2021	2B Mobile	01-4310		950.00
01-638730	01/19/2021	Big Green Cleaning Company	01-5860		211.00
01-638731	01/19/2021	Buellton Union School District	01-4300		2,000.00
01-638732	01/19/2021	CalPERS Financial Reporting	01-3202		2,856.55
01-638733	01/19/2021	Chun Chen	01-5860		3,000.00
01-638734	01/19/2021	County Education Office	01-4300		2.09
01-638735	01/19/2021	D&J Painting (Deferred Maintenance - Orcutt)	01-5860		17,820.00
01-638736	01/19/2021	Daniels Harbor Therapy Ctr LLC	01-5830		200.00
01-638737	01/19/2021	Eide Bailly LLP	01-5810		6,000.00
01-638738	01/19/2021	Laura Morizio	01-5860		3,000.00
01-638739	01/19/2021	Marcel Trujillo	01-5860		3,000.00
01-638740	01/19/2021	Paige Chamberlain	01-5860		3,000.00
01-638741	01/19/2021	Patterson Associates	01-5600		7,734.85
01-638742	01/19/2021	Philbert Pandac	01-5800		75.00
01-638743	01/19/2021	SBCSS-EVSELPA	01-5800		75.00
01-638744	01/19/2021	U.S. Bank Equipment Finance	01-5860		546.03
01-638745	01/19/2021	Voce Telecom	01-5910		65.34
Total Number of Checks			42		199,224.26

The preceding Checks have been issued in accordance with the District's Policy and authorization of the Board of Trustees. It is recommended that the preceding Checks be approved.

ESCAPE ONLINE

Page 1 of 2

Checks Dated 12/28/2020 through 01/19/2021

Check Number	Check Date	Pay to the Order of	Fund-Object	Expensed Amount	Check Amount
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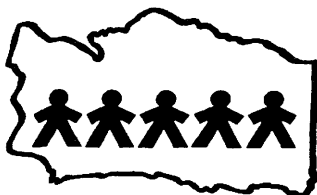
Fund Recap

<u>Fund</u>	<u>Description</u>	<u>Check Count</u>	<u>Expensed Amount</u>
01	General Fund	42	199,224.26
	Total Number of Checks	42	199,224.26
	Less Unpaid Tax Liability		.00
	Net (Check Amount)		199,224.26

The preceding Checks have been issued in accordance with the District's Policy and authorization of the Board of Trustees. It is recommended that the preceding Checks be approved.

ESCAPE ONLINE

Page 2 of 2



Santa Barbara County
Special Education Local Plan Area
 A Joint Powers Agency

Date: March 1, 2021

To: SBCSELPA JPA Board

From: Ray Avila, SBCSELPA Executive Director

Re: 2020-2021 Nonpublic School (NPS) Master Contract Rates

BACKGROUND:

The attached Exhibit A Rates sheet for the following nonpublic school (NPS) contractor is an attachment to the NPS master contract for the 2020-2021 school year and is being presented for JPA Board approval:

- Falcon Ridge Ranch

FISCAL IMPACT: Rates for services vary. Total costs for services will be determined by the individual service agreements written throughout the 2020-2021 school year and will be funded out of mental health dollars allocated to SBCSELPA NPS placements.

RECOMMENDATION: The JPA Board approve the 2020-2021 NPS Master Contract rate for contractor services as presented.

RA:lm

EXHIBIT A: 2020-2021 RATES4.1 RATE SCHEDULE FOR CONTRACT YEARThe CONTRACTOR: Falcon Ridge RanchThe CONTRACTOR CDS NUMBER: 77 76422 0136309

PER ED CODE 56366 – TEACHER-TO-PUPIL RATIO: _____

Maximum Contract Amount: _____

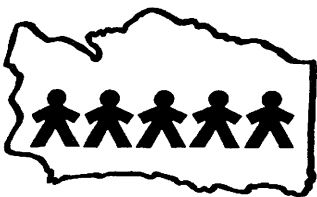
Education service(s) offered by the CONTRACTOR and the charges for such service(s) during the term of this contract shall be as follows:

1) Daily Basic Education Rate: \$1552) Inclusive Education Program

(Includes Educational Counseling (not ed related mental health) services, Speech & Language services, Behavior Intervention Planning, and Occupational Therapy as specified on the student's IEP.) DAILY RATE: _____

3) Related Services

<u>SERVICE</u>	<u>RATE</u>	<u>PERIOD</u>
<u>Intensive Individual Services (340)</u>	<u>\$155</u>	<u>Education Day</u>
<u>Language and Speech (415)</u>	<u>\$85</u>	<u>Hourly</u>
<u>Adapted Physical Education (425)</u>	_____	_____
<u>Occupational Therapy (450)</u>	_____	_____
<u>Physical Therapy (460)</u>	_____	_____
<u>Individual Counseling (510)</u>	_____	_____
<u>Counseling and Guidance (515)</u>	_____	_____
<u>Parent Counseling (520)</u>	_____	_____
<u>Social Work Services (525)</u>	_____	_____
<u>Psychological Services (530)</u>	_____	_____
<u>Behavior Intervention Services (535)</u>	_____	_____
<u>Recreation Services, Including Therapeutic (760)</u>	_____	_____
<u>College Awareness (820)</u>	_____	_____
<u>Travel Training (870)</u>	_____	_____
<u>Non-Medical Board & Care</u>	<u>\$220</u>	<u>Daily</u>
<u>Mental Health Services</u>	<u>\$74</u>	<u>Daily</u>
<u>Other (900)</u>	_____	_____



Santa Barbara County
Special Education Local Plan Area
A Joint Powers Agency

Date: March 1, 2021
To: SBCSELPA JPA Board
From: Ray Avila, SBCSELPA Executive Director
Re: 2020-2021 Nonpublic Agency (NPA) Master Contract Rates

BACKGROUND:

The attached rate sheets for the following nonpublic agency (NPA) contractors is an exhibit to the JPA Board approved NPA Master Contract for the 2020-2021 school year and is being presented for JPA Board approval:

- Goodfellow Occupational Therapy
- STAR Academy

FISCAL IMPACT: There are no costs to the SBCSELPA. The costs to member LEAs / districts are unknown currently and are dependent on their use of the contractor.

RECOMMENDATION: The JPA Board approve the 2020-2021 NPA Master Contract rate for contractor services as presented.

RA:lm

EXHIBIT A: RATES

CONTRACTOR	Goodfellow Occupational Therapy	CONTRACTOR NUMBER	2020-21-48	2020-2021
(NONPUBLIC SCHOOL OR AGENCY)			(CONTRACT YEAR)	

Per CDE Certification, total enrollment may not exceed _____

If blank, the number shall be as determine by CDE Certification.

Rate Schedule. This rate schedule limits the number of LEA students that may be enrolled and the maximum dollar amount of the contract. It may also limit the maximum number of students that can be provided specific services. Special education and/or related services offered by CONTRACTOR, and the charges for such educational and/or related services during the term of this contract shall be as follows:

Payment under this contract may not exceed _____

Total LEA enrollment may not exceed _____

	Rate	Period
A. <u>Basic Education Program/Special Education Instruction</u>	n/a	
Basic Education Program/Dual Enrollment	n/a	

Per Diem rates for LEA students whose IEPs authorize less than a full instructional day shall be adjusted proportionally.

B. Related Services

(1)	a. Language and Speech Therapy	\$130	Hourly
	b. Language and Speech Therapy – Daily 5.5 to 6 hours Direct services + 2 to 2.5 hours indirect services	\$1,000	Per Day
(2)	a. Occupational Therapy	\$130	Hourly
	b. Occupational Therapy – Daily 5.5 to 6 hours Direct services + 2 to 2.5 hours indirect services	\$1,000	Per Day
(3)	a. Physical Therapy	\$130	Hourly
	b. Physical Therapy – Daily 5.5 to 6 hours Direct services + 2 to 2.5 hours indirect services	\$1,000	Per Day

EXHIBIT A: RATES

CONTRACTOR	Haynes Family of Programs	CONTRACTOR NUMBER	2020-21-47	2020-2021
	– STAR Academy			
(NONPUBLIC SCHOOL OR AGENCY)			(CONTRACT YEAR)	

Per CDE Certification, total enrollment may not exceed _____

If blank, the number shall be as determine by CDE Certification.

Rate Schedule. This rate schedule limits the number of LEA students that may be enrolled and the maximum dollar amount of the contract. It may also limit the maximum number of students that can be provided specific services. Special education and/or related services offered by CONTRACTOR, and the charges for such educational and/or related services during the term of this contract shall be as follows:

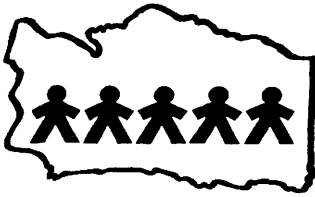
Payment under this contract may not exceed _____
 Total LEA enrollment may not exceed _____

	Rate	Period
A. <u>Basic Education Program/Special Education Instruction</u>	n/a	
Basic Education Program/Dual Enrollment	n/a	

Per Diem rates for LEA students whose IEPs authorize less than a full instructional day shall be adjusted proportionally.

B. Related Services

(1)	a. Specialized Academic Instruction	\$120	Hourly
	b. Specialized Academic Instruction Triennial Assessment – Comprehensive Academic Assessment	\$875	Per Evaluation
	c. Specialized Academic Instruction Review of Records	\$575	Per Evaluation
(2)	a. ERICS – ERHMS Counseling	\$120	Hourly
	b. ERICS/ERHMS Counseling Review of Records	\$575	Per Evaluation
	c. ERICS/ERHMS Counseling Triennial Assessment	\$875	Per Evaluation
(3)	a. Adapted Physical Education Assessment	\$1,850	Per Evaluation
	b. Adapted Physical Education Review of Records	\$575	Per Evaluation
	c. Adapted Physical Education Triennial Assessment	\$875	Per Evaluation
(4)	a. Language and Speech Therapy	\$165	Hourly
	b. Language and Speech Therapy Assessment	\$1,850	Per Evaluation
	c. Language and Speech Therapy AAC Assessment	\$1,850	Per Evaluation
	d. Language and Speech Therapy Review of Records	\$575	Per Evaluation
	e. Language and Speech Therapy Triennial Assessment	\$875	Per Evaluation
(5)	a. Functional Behavioral Assessment – One Location (School or Home)	\$1,850	Per Evaluation
	b. Functional Behavioral Assessment – Two Location (School & Home)	\$2,050	Per Evaluation
	c. Functional Behavioral Assessment with 1:1 Aide Determination (School Based)	\$2,050	Per Evaluation
(6)	a. Occupational Therapy	\$165	Hourly
	b. Occupational Therapy Assessment	\$1,850	Per Evaluation
	c. Occupational Therapy AT Assessment	\$1,850	Per Evaluation
	d. Occupational Therapy Review of Records	\$575	Per Evaluation
	e. Occupational Therapy Triennial Assessment	\$875	Per Evaluation
(7)	a. Physical Therapy Assessment	\$1,850	Per Evaluation
	b. Physical Therapy Assessment Review of Records	\$575	Per Evaluation
	c. Physical Therapy Assessment Triennial Assessment	\$875	Per Evaluation
(8)	a. Behavior Intervention – BII	\$85	Hourly
	b. Behavior Intervention – BID to Accompany BII Services	\$130	Hourly
	c. Social Skills with BCBA	\$130	Hourly



Santa Barbara County
Special Education Local Plan Area
 A Joint Powers Agency

Date: March 1, 2021

To: SBCSELPA JPA Board

From: Ray Avila, SBCSELPA Executive Director

Re: SBCSELPA 2021 Office Reorganization Proposal (Job Descriptions and Salary Schedules)

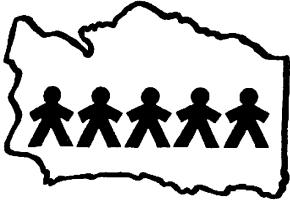
BACKGROUND:

- The proposed SBCSELPA 2021 office reorganization plan was presented to the JPA Board as an information and discussion item at the February 1, 2021 JPA Board meeting. At this meeting the SBCSELPA Executive Director, Ray Avila, explained in detail the process and procedure that went into creating this reorganization proposal.
- Specifically, due to the pending retirement of the SBCSELPA Office Manager prompted a conversation between the SBCSELPA Executive Director and current Office staff that include the SBCSELPA Coordinator, Executive Secretary, Clerical Assistant, current Office Manager, and Business Official regarding a possible re-organization of the current Office staff positions.
- This resulted in revised job descriptions and salary schedules for the SBCSELPA Office Manager, Executive Secretary (proposed to be retitled “Executive Assistant”), and Business Official (proposed to be retitled “Chief Business Official”) positions (**SEE Attached proposed job descriptions & salary schedules, REF: VI-A.1 & VI-A.2**), and the elimination of the Clerical Assistant position. The proposed SBCSELPA Office Manager, Executive Assistant, and Chief Business Official will inherit duties from the eliminated Clerical Assistant position along with a transfer of duties amongst the three positions.
- The SBCSELPA Office staff reorganization proposal is requested to go into effect as of May 1, 2021 to allow for the current SBCSELPA Office Manager to mentor and assist the SBCSELPA Office staff with the transition of duties prior to her retirement effective June 30, 2021.

Fiscal Impact: An increase of \$7,605.00 for the remainder of the 2020-2021 budget. A decrease of \$35,236.00 for the upcoming 2021-2022 budget.

Recommendation: The JPA Board approve the SBCSELPA office reorganization proposal as of May 1, 2021 as presented.

RA:lm



Santa Barbara County
Special Education Local Plan Area
 A Joint Powers Agency

CHIEF BUSINESS OFFICIAL

POSITION DEFINITION:

Under the direction of the SBCSELPA Executive Director provides administrative oversight for all necessary fiscal operations and budget reporting for Santa Barbara County SELPA to the JPA Board as well as the allocation of all Special Education Funding to member Local Educational Agencies which includes guidance with funding, expenditures, and maintenance of effort reports.

PRIMARY JOB DUTIES:

Under the direction of the SBCSELPA Executive Director:

- Prepare and oversee all aspects of the SBCSELPA Budget to include Adopted, first and second interim, unaudited actuals and ending fund balance allocation, etc.
- Present fiscal information and trainings to the Joint Power Agency Board and to Community Advisory Committee
- Educate and assist LEA/District members with *maintenance of effort (MOE)*, *SEMA and SEMB*, *Subsequent Year Tracker*, and *Excess Costs* reporting. Be the liaison to the California Department of Education and the contact person who submits all of the required reports for the member LEAs and SBCSELPA which also includes the Table 8 and the Annual Budget Plan.
- Presenting fiscal information along with the SBCSELPA Executive Director at the LEA/District Business Official and Special Education Administrators meetings (SEAMBO)
- Convene and conduct an *Ad Hoc Funding Model Committee Meeting*
- Transform Educational Code, Federal and State laws, JPA Board policy, and Local Plan language into fiscal allocations with a complex funding model. Model to be updated throughout the year with special education income projections, regional program expenses, and enrollment data collected by Program Operators.
- Provide allocations of all Special Education funding to the Administrative Unit and to the Santa Barbara County Education Office so that LEAs may be paid on a timely basis.
- Consult individually with LEAs/districts regarding fiscal education or problem-solving as requested
- Collect data from LEAs throughout the year to complete and submit grant expenditure reporting for receipt of Federal funding.
- Report Proportionate Share data for each district and assist any districts who must set-aside CEIS monies due to Significant Disproportionality requirements.
- Completion and submittal of Infant J-50 and Part C Expenditure Reports
- Provide data to auditors, including writing managerial sections of audit reports
- Report MAA student data, staff lists, and fiscal data
- Collect data from Directors each year to maintain Regional Program list

- Process Journal Vouchers and Entries to allocate funding from SELPA accounts for such items as Legal Fees, Staff Development, and Ending Fund Balances that the JPA Board has instructed SELPA to distribute to LEAs.
- Request deferred maintenance reports from MOT personnel and present any requests to Special Education Administrators, Managers, and Business Officials (SEAMBO)
- Notify Regional Program Operators that additional aides will need to be brought to SEAMBO in March and subsequently presented to JPA Board.
- Collect housing maintenance and utilities data to be included in funding model.
- Account for all funding received throughout the year and what is yet to be received. Create accrual spreadsheets for LEAs to use to close their books and for the County Education Office to use for audits.
- Assist County Education and LEAs when Special Education account codes changes

QUALIFICATIONS:

- A masters degree in business administration, accounting or related field
- Completion of a comprehensive course of study (such as the *CASBO* certificate program) related to public school business administration

EXPERIENCE:

Three years increasingly responsible experience in accounting and financial record/budget management and reporting

KNOWLEDGE OF:

- Principles, methods, practices and procedures of governmental/fund accounting and financial record management and reporting
- Laws, policies, regulations and guidelines related to accounting and fiscal record management and reporting processes in public education
- Computer accounting systems (Excel), programs and equipment
- Bookkeeping, accounting and fiscal planning and management systems and procedures
- Budget monitoring and control
- Laws related to special education funding as implemented by Chapter 7.2 of Part 30 of the California Education Code (Special Education Funding)

ABILITY TO:

- Prepare fiscal, statistical and narrative reports in a clear and concise manner
- Review, monitor, audit and verify financial statements and related summaries and reports
- Communicate effectively both orally and in writing
- Interpret, apply and explain rules, regulations, policies and procedures
- Establish and maintain cooperative and effective working relationships with others
- Operate a computer and other office equipment
- Analyze situations accurately and adopt an effective course of action
- Meet schedules and timelines
- Work independently with little direction
- Plan and organize work
- Exercise interpersonal skills using tact, patience and courtesy
- Conduct committee meetings and gain consensus
- Maintain confidentiality at all times

WORKING CONDITIONS/ENVIRONMENT:

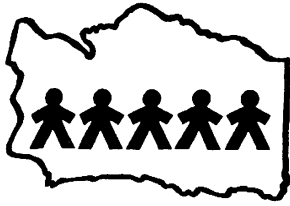
- Work functions may be performed at home office or SBCSELPA office based on the needs of the SBCSELPA and as mutually agreed up by the SBCSELPA Executive Director
- Schedule may be flexible due to the schedule of grants flowing to the SBCSELPA, first and second interim deadlines and due dates for JPA Board budget updates and the CDE Annual Budget Plan timeline.

PHYSICAL ABILITIES:

- Hearing and speaking to exchange information and make presentations
- Seeing to read a variety of materials
- Dexterity of hands and fingers to operate a computer keyboard
- Sitting for extended periods of time
- Bending at the waist, kneeling or crouching to retrieve and store files

Approved 10/3/16 by the JPA Board

Approved 03/01/21 by the JPA Board



Santa Barbara County
Special Education Local Plan Area
 A Joint Powers Agency

SBCSELPA OFFICE MANAGER

POSITION DEFINITION:

Under direction of the SBCSELPA Executive Director, perform complex and specialized secretarial and clerical functions to the JPA Board, as well as provide administrative secretarial aide to the SBCSELPA Executive Director, Coordinator and others as assigned.

QUALIFICATIONS:

- Equivalent to the completion of the twelfth grade, supplemented by coursework or training in business office management, organization and supervision and related technical skill areas at a community college.
- An associates degree is highly desirable
- Bilingual in Spanish speaking, reading, and writing is highly desirable

EXPERIENCE:

Four year of responsible executive or administrative secretarial experience, including one year in a lead or supervisory capacity.

PRIMARY JOB DUTIES:

- Performs accounting functions related to payroll and accounts payable; prepares and verifies the accuracy and completeness of accounts payable and payroll related files, records and reports; prepares system input data, verifies and reconciles output reports; makes arithmetical calculations and verifies computations; performs accounting, budget control or payroll record functions
- Provides requested reports such as the Annual Personnel Report, Pupil Count, or other reports to County, State or Federal agencies in a timely manner
- Works with a computer-based special education accounting (CALPADS) and payroll
- Assists the SBCSELPA Chief Business Official with specialized accounting functions related to tasks such as regional program cost accounting and record tracking, data reporting, etc.
- Oversees personnel paperwork and attendance accounting/absence reporting
- Assists SBCSELPA Director with tracking evaluation due dates
- Monitors and tracks *Mandated Reporter & Sexual Harassment* training compliance with personnel
- Composes correspondence concerning a wide range of subjects requiring a knowledge of policies, regulations and operational procedures; reviews outgoing correspondence and other materials for consistency with policies, regulations, operational procedures, formatting, grammatical construction and punctuation; serves as an administrative aide by receiving and responding to inquiries from either office visitors or from telephone contracts

- Take notes of meetings with LEAs/districts and conferences, and prepares an accurate summary or meeting minutes for approval
- Prepare and input data into a computerized record management, storage and retrieval system by means of a data terminal; responsible for special education management information system including ordering reports, compiling data on pupil counts, preparing instructions for district use, coordinating programming changes; reviews, evaluates for accuracy and utilizes the output reports in the office operational functions; maintains a variety of records and files, which may include personnel, budget, expenditure, and payroll data; assists with budget planning and expenditure control
- Schedules conferences and meetings with various panels and committees
- Accounts payable in Escape (weekly)
- Payroll in Escape – use SBAS final closeout calendar for due dates (monthly)
- Processing monthly payroll payments to vendors, SISC, ACSA, Aflac, etc. (monthly)
- Deposit receivables
- New employees – entering in Escape, enrolling in PERS or STRS, enrolling in SISC health.
- Journal Entries
- Run Search & Serve ad – See file with past copies in 3 drawer file under “S” Search and Serve. Add runs in Santa Barbara Independent and is posted on the SELPA website. SELPA Director reviews prior year ad before publishing in case of changes.
- Send out e-mail notice to all employees (including Wrap Team) to complete their annual Mandated Reporter and Sexual Harassment trainings. Mandated Reporter is completed each year, Sexual Harassment training is every other year. It was completed in 2020 so isn’t due again until 2022.
- CALPADS Fall 1 Reporting period is open. Districts start to report their data and make corrections. SELPA monitors their data submission. Final due date for districts will be late November/early December.
- Pull data from SIRAS for future use with MOE, Low Incidence, etc.
- Pull SIRAS data for December 1st / CALPADS
- Send directors reminder to collect Post-Secondary data for June pupil count reporting
- Send out invoices to districts who have purchased any SELPA BCBA days for the current year.
- LCI SDC Data Collection memo and form to special education directors
- Employee contracts for the upcoming year to be completed and given to secretary for JPA Board agenda
- Blank annual calendar to SELPA employees who need to complete.
- Personnel Data Report – CDE will send the SELPA Director information on due date, etc.
- LCI Funding – complete calculations from district data and JV funding out before month end close – otherwise you will have to post this as a payable and instruct the districts to post it as a receivable.
- Reconcile vacation and sick leave from the current year and notify each employee of their balance.
- Uses word processing to assist the SELPA Executive Director with correspondence, agenda, agenda items and supplemental materials for the SELPA meetings.

- Drive occasionally for department business
- Serves as a confidential secretary to the SBCSELPA Executive Director, Coordinator, JPA Board and CAC
- Organizes and coordinates the clerical activities of the SELPA Executive Director's office, including planning, organization, layout, and development of assigned tasks related to special education operations in Santa Barbara County
- Coordinates the preparation and drafting of the component sections of the JPA Board agenda; attends various meetings and takes and transcribes notes; prepares meeting minutes for editing and distributes minute summaries as required; requests information and data, and surveys
- Coordinates the preparation and drafting of the component sections of the Community Advisory Committee (CAC) agenda; attends meetings and takes and transcribes notes; prepares meeting minutes for editing and distributes minute summaries as required
- Assists in the dissemination of material to LEAs/districts and the *California Department of Education (CDE)*
- Assists in the revision, updating and maintenance of the SBCSELPA Local Plan per the direction of the SBCSELPA Executive Director
- Assists in the revision, updating and maintenance of the SBCSELPA Procedural Handbook per the direction of the SBCSELPA Executive Director
- Monitor, maintain, and coordinate updating of Inter Agency Agreements (IAA's) pursuant to review timeline
- Responds to inquiries related to SBCSELPA policies, regulations and operational procedures
- Coordinate the annual private school meeting in both North and South County to meet the federal regulatory requirements regarding special education (IDEA)
- Assist with the annual coordination and facilitation of the Santa Barbara Psychology Internship Consortium (SB-PIC)
- Attends to administrative and clerical detail utilizing initiative and good judgment
- Requires a familiarity with legal mandates, policies and regulations; independently prepares for Administrator's review correspondence, memoranda, reports and a variety of other communicative subject matter that may include privileged and highly sensitive materials
- Review and editing of written documents for the SBCSELPA Executive Director
- Prepares and maintains the official records of the SBCSELPA Board minutes
- Other duties as assigned

KNOWLEDGE OF:

- Principles, procedures, methods, techniques, and operations of an administrator's office
- Modern office practices and equipment, including automated data management, storage, and retrieval systems, to include use of the Microsoft Office Suite
- Be familiar with the *Brown Act* requirements of public meetings
- Use of proper English usage, spelling, punctuation, grammar, and manuscript and report formatting
- Legal mandates, policies, regulations, and operational procedures which govern the activities of the administrator's office

ABILITY TO:

- Coordinate, organize and schedule administrative and clerical functions and activities
- Effectively and efficiently perform responsible secretarial and administrative aide functions
- Compile and prepare accurate and comprehensive reports
- Communicate and collaborate with others, as well as take direction and feedback
- Effectively communicate in oral and written form
- Establish and maintain a variety of complex, privileged and sensitive files and records
- Maintain confidentiality at all times
- Type at a net corrected speed of 60 words per minute
- Make arithmetical calculations with speed and accuracy and develop charts and spreadsheets
- Understand and carryout oral and written directions
- Establish and maintain cooperative working relationships
- Draft letters of correspondence for administrator as needed
- Assist with event setup, sign-in and break-down

PHYSICAL ABILITIES:

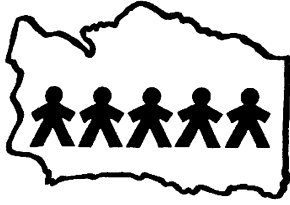
- Hearing and speaking to exchange information
- Seeing to read a variety of materials
- Dexterity of hands and fingers to operate a computer keyboard
- Sitting for extended periods of time
- Bending at the waist, kneeling, or crouching to retrieve and store files.
- Assist with event setup, sign-in and break-down of events which may require lifting of at least 25 LBS

Approved 5/1/84 by the JPA Board - Effective 7/1/84

Revisions Approved by the JPA Board 11/02/09

Revisions Approved by the JPA Board 8/26/19

Approved 03/01/2020 by the JPA Board



Santa Barbara County
Special Education Local Plan Area
 A Joint Powers Agency

SBCSELPA EXECUTIVE ASSISTANT

POSITION DEFINITION:

Under direction of the SBCSELPA Executive Director, Coordinator, and Office Manager, performs general clerical functions to the SBCSELPA, as well as support to the SBCSELPA Mental Health Specialists. This position requires some fluency in Spanish.

QUALIFICATIONS:

Graduation from high school or equivalent including or supplemented by business courses. Bilingual in speaking, reading, and writing Spanish is highly desirable

EXPERIENCE:

- Past experience in use of Microsoft Office Suite products to include Excel
- Past experience in data entry and basic office functions

PRIMARY JOB DUTIES:

- Serves as a confidential assistant to the SBCSELPA Executive Director, Coordinator, and SEAM/SEAMBO
- Coordinates the preparation and drafting of the component sections of the SEAM/SEAMBO agenda; attends meetings and takes and transcribes notes; prepares meeting minutes for editing and distributes minute summaries as required
- Assists in the dissemination of material to LEAs/districts
- Responds to inquiries related to SBCSELPA policies, regulations, and operational procedures
- Assist Coordinator in coordination and facilitation of Professional Development training, Transition Fair and other SBCSELPA related trainings and events as directed
- Attends to administrative and clerical detail utilizing initiative and good judgment
- Requires a familiarity with legal mandates, policies, and regulations; independently prepares for Administrator's review correspondence, memoranda, reports and a variety of other communicative subject matter that may include privileged and highly sensitive materials
- Review and editing of written documents for the SBCSELPA Executive Director
- Assists in the oversight of and posting of materials on the SBCSELPA website
- Oversees the ordering of materials and supplies for the SBCSELPA office
- Composes correspondence concerning a wide range of subjects requiring a knowledge of policies, regulations, and operational procedures; reviews outgoing correspondence and other materials for consistency with policies, regulations, operational procedures, formatting, grammatical construction and punctuation; serves as an administrative aide by receiving and responding to inquiries from either office visitors or from telephone contracts

- Take notes of meetings with LEAs/districts and conferences, and prepares an accurate summary or meeting minutes for approval
- Assists SBCSELPA Director engage in master contracts with requesting agencies or consultants
- Oversee the data entry into the IEP/SIRAS computer-based system related to user access, etc.
- Prepare and input data into a computerized record management, storage and retrieval system by means of a data terminal; responsible for special education management information system including ordering reports, compiling data on pupil counts, preparing instructions for district use, coordinating programming changes; reviews, evaluates for accuracy and utilizes the output reports in the office operational functions; maintains a variety of records and files, which may include personnel, budget, expenditure, and payroll data; assists with budget planning and expenditure control
- Schedules conferences and meetings with various panels and committees
- SEAM and SEAMBO agendas prepared and sent to special education directors and fiscal staff via e-mail using Padlet. Copies made for SELPA Director and Coordinator and yourself.
- NPA/NPS Master Contracts and ISAs – as placements are made through the year.
- Journal Entries
- First NPS invoices (July through December) sent to districts. Formula for calculation of how much districts owe is included in SELPA Policy 3204.
- E-mails to all those with current NPA/NPS master contracts to get rates for upcoming school year.
- Begin contracts for next year including Audiological, NPS, NPA
- Do all NPA and NPS master contracts and NPS ISAs for upcoming school year. Give to secretary for inclusion on June JPA Board agenda – a blank copy of the NPA Master Contract, blank copy of NPS Master Contract and copy of each agency's rate sheet.
- Do audiologic contracts for upcoming school year and give to secretary for JPA Board inclusion.
- Annual CPI list of those trained in prior year sent to directors (Brian now doing this – as of 2019-20)
- NPS invoices for January through June sent to district. This may take place in July as you have to wait for the June invoices to arrive before doing the calculations.
- Performs a variety of clerical and support duties to relieve the administrators of administrative and clerical detail; assists in assuring smooth and efficient office operations; coordinates flow of communications and information for the administrators
- Manages arrangements for conferences, workshops, and travel.
- Drive occasionally for department business
- Develop and maintain procedures, and databases, for a variety of department functions.
- Attend seminars, training sessions and meetings as assigned; Participate on committees as assigned.
- Receives and handles telephone and personal contacts of a sensitive nature from superintendents, district directors, business administrators, parents, and other agencies maintaining confidentiality.
- Independently compose and prepare a variety of correspondence, documents, forms, and materials from oral directions, rough drafts, handwritten notes, or charts using a variety of software independently with minimal supervision and direction.

- Effectively uses word processing, database, and spreadsheet software application programs and student program-specific information system(s) in the course of assigned duties.
- Prepares letters, memos, and forms, requesting, providing, or verifying information; composes correspondence from rough drafts; receive, screen and route mail.
- Operates computers and peripheral equipment to enter, revise and update information; generates reports, lists and summaries, charts and reports as needed; utilizes various software applications as required by the position including Office Suite: Word, Excel, Publisher – as well as other programs including OMS, SIRAS, Adobe, etc.
- Utilizes assigned computer system and software to generate a variety of documents, records, lists and reports related to Special Education student data and information; initiates queries; compiles information and manipulates data from multiple sources; verifies accuracy of input and output of data
- Assists Coordinator with set up and breakdown of PD Workshops. Maintains and updates SBCSELPA Conference Room Calendar.
- Receive and screen phone calls and visitors; provide information and direct inquiries and visitors to the proper person or office; provide general information concerning policies and procedures of assigned program or office
- Performs ADR intake as needed, including the dissemination of procedure and protocol.
- Provide support to Mental Health WRAP team, Mental Health Specialists, and SBC SELPA BCBAS. Set up Individualized Education Plan meetings for students placed in Non-Public Schools.
- Performs other job-related duties as assigned

KNOWLEDGE OF:

- Clerical functions to include word processing, answering phones, and data base set up
- Modern office practices and equipment, including automated data management, storage and retrieval systems, to include use of the Microsoft Office Suite
- Use of proper English usage, spelling, punctuation, grammar, and manuscript and report formatting
- Legal mandates, policies, regulations, and operational procedures which govern the activities of the administrator's office

ABILITY TO:

- Coordinate, organize and schedule a variety SBCSELPA operations in a given day or week
- Compile and prepare accurate and data base files
- Communicate and collaborate with others, as well as take direction and feedback
- Effectively communicate in oral and written form
- Maintain confidentiality at all times
- Be able to multi-task and keep track of meetings set, persons to invite, etc.
- Type at a net corrected speed of 60 words per minute
- Understand and carryout oral and written directions
- Establish and maintain cooperative working relationships
- Edit letters of correspondence for administrators as needed
- Assist with event setup, sign-in and break-down

PHYSICAL ABILITIES:

- Hearing and speaking to exchange information

- Seeing to read a variety of materials
- Dexterity of hands and fingers to operate a computer keyboard
- Sitting for extended periods of time
- Bending at the waist, kneeling or crouching to retrieve and store files
- Assist with event setup, sign-in and break-down of events which may require lifting of at least 25 LBS

Approved 10/3/16 by the JPA Board

Approved 08/26/19 by the JPA Board

Approved 03/01/2020 by the JPA Board

SANTA BARBARA COUNTY SPECIAL EDUCATION LOCAL PLAN AREA**CLASSIFIED SALARY SCHEDULE
2020-21****CHIEF BUSINESS OFFICIAL**

<u>A</u>	<u>B</u>	<u>C</u>	<u>D</u>	<u>E</u>
6,090	6,446	6,801	7,158	7,513
<u>L-1</u>	<u>L-2</u>	<u>L-3</u>	<u>L-4</u>	<u>L-5</u>
7,663	7,816	7,974	8,133	8,294

Effective 07/01/20

JPA Board Action taken on March 2, 2020 – 1% COLA

L = Longevity (see SELPA Personnel Handbook, Section 7, Page 7-12)

SANTA BARBARA COUNTY SPECIAL EDUCATION LOCAL PLAN AREA

**CLASSIFIED SALARY SCHEDULE
2020-21**

OFFICE MANAGER - Revised

<u>A</u>	<u>B</u>	<u>C</u>	<u>D</u>	<u>E</u>
4,480	4,794	5,108	5,422	5,736
<u>L-1</u>	<u>L-2</u>	<u>L-3</u>	<u>L-4</u>	<u>L-5</u>
5,851	5,968	6,087	6,209	6,333

Effective 5/1/21

JPA Board Action taken on -----

L = Longevity (see SELPA Personnel Handbook, Section 7, Page 7-12)

SANTA BARBARA COUNTY SPECIAL EDUCATION LOCAL PLAN AREA

**CLASSIFIED SALARY SCHEDULE
2020-21**

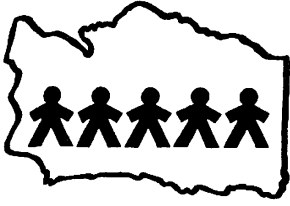
EXECUTIVE ASSISTANT

<u>A</u>	<u>B</u>	<u>C</u>	<u>D</u>	<u>E</u>
4,198	4,425	4,651	4,878	5,104
 <u>L-1</u>	 <u>L-2</u>	 <u>L-3</u>	 <u>L-4</u>	 <u>L-5</u>
5,206	5,310	5,416	5,525	5,635

Effective 05/01/21

JPA Board Action taken on -----

L = Longevity (see SELPA Personnel Handbook, Section 7, Page 7-12)



Santa Barbara County
Special Education Local Plan Area
 A Joint Powers Agency

ACCOUNTANT/ CHIEF BUSINESS OFFICIAL

POSITION DEFINITION:

Under the direction of the SBCSELPA **Executive** Director provides administrative oversight for all necessary SBCSELPA-fiscal operations **and budget reporting for Santa Barbara County SELPA to the JPA Board as well as the allocation of all Special Education Funding to member Local Educational Agencies which includes guidance with funding, expenditures, and maintenance of effort reports.** to include the funding model / allocation of the SELPA's AB-602 Special Education Block Grant and other special education funding.

PRIMARY JOB DUTIES:

Under the direction of the SBCSELPA **Executive** Director:

- Prepare, ~~monitor~~ and oversee all aspects of the SBCSELPA Budget to include **Adopted**, first and second interim, ~~annual budget plan, excess costs,~~ **unaudited actuals and ending fund balance allocation**, etc.
- **Present fiscal information and trainings to the Joint Power Agency Board and to Community Advisory Committee**
- Oversee the collection, compilation of **Educate and assist** LEA/District **members** with *maintenance of effort (MOE)* **SEMA and SEMB, Subsequent Year Tracker**, and **Excess Costs** reporting. **Be the liaison to the California Department of Education and the contact person who submits all of the required reports for the member LEAs and SBCSELPA which also includes the Table 8 and the Annual Budget Plan.** and provision of the report to the California Department of Education (CDE) by required deadlines.
- Attend and assist **Presenting fiscal information along with the** SBCSELPA **Executive** Director ~~with facilitation of~~ **at** the LEA/District Business Official and Special Education Administrators **meetings (SEAMBO)** ~~co-meeting one monthly~~
- Convene and conduct an *Ad hoc Funding Model Committee Meeting*
- **Transform Educational Code, Federal and State laws, JPA Board policy, and Local Plan language into fiscal allocations with a complex funding model. Model to be updated throughout the year with**
- Prepare and update special education income projections, ~~for all LEAs/Districts within SBCSELPA,~~
- ~~Oversee and collect~~ regional program expenses **and enrollment** data **collected and provide by Program Operators** ~~LEAs/districts data and updates~~ **and be provided**
- ~~Provided information to each entity operating programs for children with disabilities regarding the amounts of special education funding to be received and allocated from various federal and state funding sources~~

- Provide allocations of all Special Education funding to the Administrative Unit and to the Santa Barbara County Education Office so that LEAs may be paid on a timely basis.
- Consult individually with LEAs/districts regarding the funding model, *Maintenance of Effort*, regional program costs, etc. fiscal education or problem-solving as requested
- Collect data from LEAs throughout the year to complete and submit grant expenditure reporting for receipt of Federal funding.
- Report Proportionate Share data for each district and assist any districts who must set-aside CEIS monies due to Significant Disproportionality requirements.
- Completion and submittal of Infant J-50 and Part C Expenditure Reports
- Provide data to auditors, including writing managerial sections of audit reports
- Report MAA student data, staff lists, and fiscal data
- Collect data from Directors each year to maintain Regional Program list
- Process Journal Vouchers and Entries to allocate funding from SELPA accounts for such items as Legal Fees, Staff Development, and Ending Fund Balances that the JPA Board has instructed SELPA to distribute to LEAs.
- Request deferred maintenance reports from MOT personnel and present any requests to Special Education Administrators, Managers, and Business Officials (SEAMBO)
- Notify Regional Program Operators that additional aides will need to be brought to SEAMBO in March and subsequently presented to JPA Board.
- Collect housing maintenance and utilities data to be included in funding model.
- Account for all funding received throughout the year and what is yet to be received. Create accrual spreadsheets for LEAs to use to close their books and for the County Education Office to use for audits.
- Assist County Education and LEAs when Special Education account codes changes
- Provide to all special education program operators and to School Business Advisory Services (County Education Office) a schedule, updated periodically, of local education agencies' special education apportionments
- Provide mid-year and end-of-year recalculations of district income projections based on information from the California Department of Education (CDE) and other sources
- Calculate multi-year income projections for all entities that operate programs for children with disabilities as specified in the SBCSELPA Procedural Handbook and Local Plan
- Calculate prior year adjustments of special education income based upon recertification of prior year income data
- Assist with the collection of Maintenance of Effort (MOE) data from districts and compile for submittal to CDE
- Perform other fiscal-related duties, to include presentations at monthly meetings or other trainings and Joint Powers Agency (JPA) Board meetings
- Attend monthly JPA Board meetings and provide input to the JPA Board as requested

QUALIFICATIONS:

- A masters degree in business administration, accounting or related field
- Completion of a comprehensive course of study (such as the CASBO certificate program) related to public school business administration

EXPERIENCE:

Three years increasingly responsible experience in accounting and financial record/budget management and reporting

KNOWLEDGE OF:

- Principles, methods, practices and procedures of governmental/fund accounting and financial record management and reporting
- Laws, policies, regulations and guidelines related to accounting and fiscal record management and reporting processes in public education
- Computer accounting systems (Excel), programs and equipment
- Bookkeeping, accounting and fiscal planning and management systems and procedures
- Budget monitoring and control
- Laws related to special education funding as implemented by Chapter 7.2 of Part 30 of the California Education Code (Special Education Funding)

ABILITY TO:

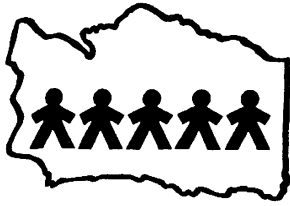
- Prepare fiscal, statistical and narrative reports in a clear and concise manner
- Review, monitor, audit and verify financial statements and related summaries and reports
- Communicate effectively both orally and in writing
- Interpret, apply and explain rules, regulations, policies and procedures
- Establish and maintain cooperative and effective working relationships with others
- Operate a computer and other office equipment
- Analyze situations accurately and adopt an effective course of action
- Meet schedules and timelines
- Work independently with little direction
- Plan and organize work
- ~~Prepare records and reports related to assigned activities~~
- Exercise interpersonal skills using tact, patience and courtesy
- Conduct committee meetings and gain consensus
- ~~Utilize appropriate telephone techniques and etiquette~~
- Maintain confidentiality at all times

WORKING CONDITIONS/ENVIRONMENT:

- Work functions may be performed at home office or SBCSELPA office based on the needs of the SBCSELPA and as mutually agreed up by the SBCSELPA **Executive** Director
- Schedule may be flexible due to the schedule of grants flowing to the SBCSELPA, first and second interim deadlines and due dates for JPA Board budget updates and the CDE Annual Budget Plan timeline. ~~The part time work schedule shall be approved by the SBCSELPA Director.~~

PHYSICAL ABILITIES:

- Hearing and speaking to exchange information and make presentations
- Seeing to read a variety of materials
- Dexterity of hands and fingers to operate a computer keyboard
- Sitting for extended periods of time
- Bending at the waist, kneeling or crouching to retrieve and store files



Santa Barbara County
Special Education Local Plan Area
 A Joint Powers Agency

SBCSELPA OFFICE MANAGER
EXECUTIVE SECRETARY TO THE SELPA ADMINISTRATORS

POSITION DEFINITION:

Under direction of the SBCSELPA Executive Director, perform complex and specialized secretarial and clerical functions to the JPA Board, as well as provide administrative secretarial aide to the SBCSELPA Executive Director, Coordinator and others as assigned.

QUALIFICATIONS:

- Equivalent to the completion of the twelfth grade, supplemented by coursework or training in business office management, organization and supervision and related technical skill areas at a community college.
- An associates degree is highly desirable
- Bilingual in Spanish speaking, reading, and writing is highly desirable

EXPERIENCE:

Four year of responsible executive or administrative secretarial experience, including one year in a lead or supervisory capacity.

PRIMARY JOB DUTIES:

- Performs accounting functions related to payroll and accounts payable; prepares and verifies the accuracy and completeness of accounts payable and payroll related files, records and reports; prepares system input data, verifies and reconciles output reports; makes arithmetical calculations and verifies computations; performs accounting, budget control or payroll record functions
- Provides requested reports such as the Annual Personnel Report, Pupil Count, or other reports to County, State or Federal agencies in a timely manner
- Works with a computer-based special education accounting (CALPADS) and payroll
- Assists the SBCSELPA Chief Business Official with specialized accounting functions related to tasks such as regional program cost accounting and record tracking, data reporting, etc.
- Oversees personnel paperwork and attendance accounting/absence reporting
- Assists SBCSELPA Director with tracking evaluation due dates
- Monitors and tracks Mandated Reporter & Sexual Harassment training compliance with personnel
- Composes correspondence concerning a wide range of subjects requiring a knowledge of policies, regulations and operational procedures; reviews outgoing correspondence and other materials for consistency with policies, regulations, operational procedures, formatting, grammatical construction and punctuation;

serves as an administrative aide by receiving and responding to inquiries from either office visitors or from telephone contracts

- Take notes of meetings with LEAs/districts and conferences, and prepares an accurate summary or meeting minutes for approval
- Prepare and input data into a computerized record management, storage and retrieval system by means of a data terminal; responsible for special education management information system including ordering reports, compiling data on pupil counts, preparing instructions for district use, coordinating programming changes; reviews, evaluates for accuracy and utilizes the output reports in the office operational functions; maintains a variety of records and files, which may include personnel, budget, expenditure, and payroll data; assists with budget planning and expenditure control
- Schedules conferences and meetings with various panels and committees
- Processes Accounts payable in Escape
- Processes Payroll in Escape
- Processes Accounts Receivable under the direction of the Chief Business Official.
- Processes the intake for New employees, including registering them with CalPERS or CalSTRS and SISC as appropriate
- Processes Journal Entries under the direction of the Chief Business Official.
- Oversees the completion of annual personnel reports such as Mandated Reporter and Sexual Harassment trainings.
- Prepares invoices for LEAs for the purchase of SELPA BCBA services.
- Prepares LCI SDC Data Collection memo and form and provides to special education directors
- Prepares annual Employee contracts
- Uses word processing to assist the SELPA Executive Director with correspondence, agenda, agenda items and supplemental materials for the SELPA meetings.
- Drive occasionally for department business
- Serves as a confidential secretary to the SBCSELPA Executive Director, Coordinator, JPA Board and CAC
- Organizes and coordinates the clerical activities of the SELPA Executive Director's office, including planning, organization, layout, and development of assigned tasks related to special education operations in Santa Barbara County
- Coordinates the preparation and drafting of the component sections of the JPA Board agenda; attends various meetings and takes and transcribes notes; prepares meeting minutes for editing and distributes minute summaries as required; requests information and data, and surveys
- Coordinates the preparation and drafting of the component sections of the Community Advisory Committee (CAC) agenda; attends meetings and takes and transcribes notes; prepares meeting minutes for editing and distributes minute summaries as required
- Assists in the dissemination of material to LEAs/districts and the *California Department of Education (CDE)*
- Assists in the revision, updating and maintenance of the SBCSELPA Local Plan per the direction of the SBCSELPA Executive Director

- Assists in the revision, updating and maintenance of the SBCSELPA Procedural Handbook per the direction of the SBCSELPA Executive Director
- ~~Maintain and update information related to Independent Education Evaluators (IEE)~~
- Monitor, maintain, and coordinate updating of Inter Agency Agreements (IAA's) pursuant to review timeline
- Responds to inquiries related to SBCSELPA policies, regulations and operational procedures
- ~~Assist Coordinator in coordination and facilitation of Professional Development training, Transition Fair and other SBCSELPA related trainings and events as directed~~
- Coordinate the annual private school meeting in both North and South County to meet the federal regulatory requirements regarding special education (IDEA)
- Assist with the annual coordination and facilitation of the Santa Barbara Psychology Internship Consortium (SB-PIC)
- Attends to administrative and clerical detail utilizing initiative and good judgment
- Requires a familiarity with legal mandates, policies and regulations; independently prepares for Administrator's review correspondence, memoranda, reports and a variety of other communicative subject matter that may include privileged and highly sensitive materials
- Review and editing of written documents for the SBCSELPA Executive Director
- Prepares and maintains the official records of the SBCSELPA Board minutes
- ~~Assists in the oversight of and posting of materials on the SBCSELPA website~~
- Other duties as assigned

KNOWLEDGE OF:

- Principles, procedures, methods, techniques, and operations of an administrator's office
- Modern office practices and equipment, including automated data management, storage and retrieval systems, to include use of the Microsoft Office Suite
- Be familiar with the *Brown Act* requirements of public meetings
- Use of proper English usage, spelling, punctuation, grammar, and manuscript and report formatting
- Legal mandates, policies, regulations, and operational procedures which govern the activities of the administrator's office

ABILITY TO:

- Coordinate, organize and schedule administrative and clerical functions and activities
- Effectively and efficiently perform responsible secretarial and administrative aide functions
- Compile and prepare accurate and comprehensive reports
- Communicate and collaborate with others, as well as take direction and feedback
- Effectively communicate in oral and written form
- Establish and maintain a variety of complex, privileged and sensitive files and records
- Maintain confidentiality at all times
- Type at a net corrected speed of 60 words per minute
- Make arithmetical calculations with speed and accuracy and develop charts and spreadsheets

- Understand and carryout oral and written directions
- Establish and maintain cooperative working relationships
- Draft letters of correspondence for administrator as needed
- Assist with event setup, sign-in and break-down

PHYSICAL ABILITIES:

- Hearing and speaking to exchange information
- Seeing to read a variety of materials
- Dexterity of hands and fingers to operate a computer keyboard
- Sitting for extended periods of time
- Bending at the waist, kneeling, or crouching to retrieve and store files.
- Assist with event setup, sign-in and break-down of events which may require lifting of at least 25 LBS

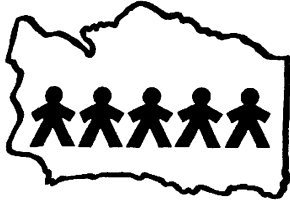
Approved 5/1/84 by the JPA Board

Effective 7/1/84

Revisions Approved by the JPA Board 11/02/09

Revisions Approved by the JPA Board 8/26/19

Approved 03/2020 by the JPA Board



Santa Barbara County
Special Education Local Plan Area
 A Joint Powers Agency

SBCSELPA EXECUTIVE ASSISTANT
CLERICAL ASSISTANT

POSITION DEFINITION:

Under direction of the SBCSELPA Executive Director, Coordinator, and Office Manager, performs general clerical functions to the SBCSELPA, as well as support to the SBCSELPA Mental Health Specialists. This position requires some fluency in Spanish.

QUALIFICATIONS:

Graduation from high school or equivalent including or supplemented by business courses. Bilingual in speaking, reading, and writing Spanish is highly desirable

EXPERIENCE:

- Past experience in use of Microsoft Office Suite products to include Excel
- Past experience in data entry and basic office functions

PRIMARY JOB DUTIES:

- Serves as a confidential assistant to the SBCSELPA Executive Director, Coordinator, and SEAM/SEAMBO
- Coordinates the preparation and drafting of the component sections of the SEAM/SEAMBO agenda; attends meetings and takes and transcribes notes; prepares meeting minutes for editing and distributes minute summaries as required
- Assists in the dissemination of material to LEAs/districts
- Responds to inquiries related to SBCSELPA policies, regulations, and operational procedures
- Assist Coordinator in coordination and facilitation of Professional Development training, Transition Fair and other SBCSELPA related trainings and events as directed
- Attends to administrative and clerical detail utilizing initiative and good judgment
- Requires a familiarity with legal mandates, policies, and regulations; independently prepares for Administrator's review correspondence, memoranda, reports and a variety of other communicative subject matter that may include privileged and highly sensitive materials.
- Review and editing of written documents for the SBCSELPA Executive Director
- Assists in the oversight of and posting of materials on the SBCSELPA website
- Oversees the ordering of materials and supplies for the SBCSELPA office
- Composes correspondence concerning a wide range of subjects requiring a knowledge of policies, regulations, and operational procedures; reviews outgoing correspondence and other materials for consistency with policies, regulations, operational procedures, formatting, grammatical construction and punctuation; serves as an administrative aide by receiving and responding to inquiries from either office visitors or from telephone contacts.

- Take notes of meetings with LEAs/districts and conferences, and prepares an accurate summary or meeting minutes for approval
- Assists SBCSELP Director engage in master contracts with requesting agencies or consultants
- Oversee the data entry into the IEP/SIRAS computer-based system related to user access, etc.
- Prepare and input data into a computerized record management, storage and retrieval system by means of a data terminal; responsible for special education management information system including ordering reports, compiling data on pupil counts, preparing instructions for district use, coordinating programming changes; reviews, evaluates for accuracy and utilizes the output reports in the office operational functions; maintains a variety of records and files, which may include personnel, budget, expenditure, and payroll data; assists with budget planning and expenditure control
- Schedules conferences and meetings with various panels and committees
- Prepares Journal Entries as needed and under the supervision of the Chief Business Official.
- Prepares Invoices for LEAs for Nonpublic School Placements.
- Processes Accounts Payable and Receivable under the supervision of the Chief Business Official.
- Performs a variety of clerical and support duties to relieve the administrators of administrative and clerical detail; assists in assuring smooth and efficient office operations; coordinates flow of communications and information for the administrators.
- Manages arrangements for conferences, workshops, and travel.
- Drive occasionally for department business
- Develop and maintain procedures, and databases, for a variety of department functions.
- Attend seminars, training sessions and meetings as assigned; Participate on committees as assigned.
- Receives and handles telephone and personal contacts of a sensitive nature from superintendents, district directors, business administrators, parents, and other agencies maintaining confidentiality.
- Independently compose and prepare a variety of correspondence, documents, forms, and materials from oral directions, rough drafts, handwritten notes, or charts using a variety of software independently with minimal supervision and direction.
- Duplicates, collates, and distributes a variety of printed materials assigned.
- Operates a variety of office machines such as a computer, printer, fax machine, calculator, copier, and specialized equipment common to assigned program or office.
- Prepare and maintain files according to established procedures; maintain confidentiality of materials and information.
- Effectively uses word processing, database, and spreadsheet software application programs and student program-specific information system(s) in the course of assigned duties.
- Prepares letters, memos, and forms, requesting, providing, or verifying information; composes correspondence from rough drafts; receive, screen and route mail.
- Operates computers and peripheral equipment to enter, revise and update information; generates reports, lists and summaries, charts and reports as needed; utilizes various

software applications as required by the position including Office Suite: Word, Excel, Publisher – as well as other programs including OMS, **SIRAS**, Adobe, etc.

- **Utilizes assigned computer system and software to generate a variety of documents, records, lists and reports related to Special Education student data and information; initiates queries, compiles information and manipulates data from multiple sources; verifies accuracy of input and output of data**
- Assists Coordinator with set up and breakdown of PD Workshops. Maintains and updates SBCSELPA Goleta Conference Room Calendar.
- Receive and screen phone calls and visitors; provide information and direct inquiries and visitors to the proper person or office; provide general information concerning policies and procedures of assigned program or office
- Performs ADR intake as needed, including the dissemination of procedure and protocol.
- Provide support to Mental Health WRAP team, Mental Health Specialists, and SBC SELPA BCBAS. Set up Individualized Education Plan meetings for students placed in Non-Public Schools.
- Performs other job-related duties as assigned

KNOWLEDGE OF:

- Clerical functions to include word processing, answering phones, and data base set up
- Modern office practices and equipment, including automated data management, storage and retrieval systems, to include use of the Microsoft Office Suite
- Use of proper English usage, spelling, punctuation, grammar, and manuscript and report formatting
- Legal mandates, policies, regulations, and operational procedures which govern the activities of the administrator's office

ABILITY TO:

- Coordinate, organize and schedule a variety SBCSELPA operations in a given day or week
- Compile and prepare accurate and data base files
- Communicate and collaborate with others, as well as take direction and feedback
- Effectively communicate in oral and written form
- Maintain confidentiality at all times
- Be able to multi-task and keep track of meetings set, persons to invite, etc.
- Type at a net corrected speed of 60 words per minute
- Understand and carryout oral and written directions
- Establish and maintain cooperative working relationships
- Edit letters of correspondence for administrators as needed
- Assist with event setup, sign-in and break-down

PHYSICAL ABILITIES:

- Hearing and speaking to exchange information
- Seeing to read a variety of materials
- Dexterity of hands and fingers to operate a computer keyboard
- Sitting for extended periods of time
- Bending at the waist, kneeling or crouching to retrieve and store files
- Assist with event setup, sign-in and break-down of events which may require lifting of at least 25 LBS

Approved 10/3/16 by the JPA Board
Approved 08/26/19 by the JPA Board
Approved 03/2020 by the JPA Board

SANTA BARBARA COUNTY SPECIAL EDUCATION LOCAL PLAN AREA**CLASSIFIED SALARY SCHEDULE
2020-21****CHIEF ACCOUNTANT/BUSINESS OFFICIAL**

<u>A</u>	<u>B</u>	<u>C</u>	<u>D</u>	<u>E</u>
6,090	6,446	6,801	7,158	7,513
<u>L-1</u>	<u>L-2</u>	<u>L-3</u>	<u>L-4</u>	<u>L-5</u>
7,663	7,816	7,974	8,133	8,294

Effective 07/01/20

JPA Board Action taken on March 2, 2020 – 1% COLA

L = Longevity (see SELPA Personnel Handbook, Section 7, Page 7-12)

SANTA BARBARA COUNTY SPECIAL EDUCATION LOCAL PLAN AREA

**CLASSIFIED SALARY SCHEDULE
2020-21**

OFFICE MANAGER - Revised

<u>A</u>	<u>B</u>	<u>C</u>	<u>D</u>	<u>E</u>
4,005	4,226	4,459	4,681	4,906
4,480	4,794	5,108	5,422	5,736
<u>L-1</u>	<u>L-2</u>	<u>L-3</u>	<u>L-4</u>	<u>L-5</u>
5,004	5,105	5,207	5,313	5,415
5,851	5,968	6,087	6,209	6,333

Effective 5/1/21

JPA Board Action taken on -----

L = Longevity (see SELPA Personnel Handbook, Section 7, Page 7-12)

SANTA BARBARA COUNTY SPECIAL EDUCATION LOCAL PLAN AREA

**CLASSIFIED SALARY SCHEDULE
2020-21**

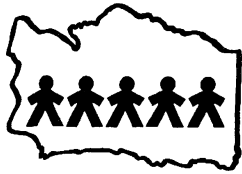
EXECUTIVE ASSISTANT

<u>A</u>	<u>B</u>	<u>C</u>	<u>D</u>	<u>E</u>
4,198	4,425	4,651	4,878	5,104
 <u>L-1</u>	 <u>L-2</u>	 <u>L-3</u>	 <u>L-4</u>	 <u>L-5</u>
5,206	5,310	5,416	5,525	5,635

Effective 05/01/21

JPA Board Action taken on -----

L = Longevity (see SELPA Personnel Handbook, Section 7, Page 7-12)



Santa Barbara County
Special Education Local Plan Area
 A Joint Powers Agency

REF: VI-B

Date: March 1, 2021

To: SBCSELPA JPA Board

From: Ray Avila, SBCSELPA Executive Director

Re: Certification of Second Period Interim Report for the Fiscal Year 20-21

BACKGROUND:

Fiscal information for revenues, expenses, and ending balance is included.

➤ **Revenue Accounts**

- **8100-8299** – Federal Regionalized Services, ADR, and Mental Health Funding
- **8300-8599** – State Mental Health Funding, STRs of Behalf
- **8600-8799** – AB 602 Funding, Regionalized Services Funding, Low Incidence, BCBAs paid by districts, Interest Income and SELPA-Wide Staff Development Funding
- **COLA** applied to AB602 and regionalized revenue *only* based on the Governor's Budget (0% in 20-21, 1.5% in 21-22, 2.98% in 22-23)

➤ **Expenditure Accounts**

- Step and Column but no COLA on salaries in the multi-year projections. Salary changes for office reorganization cause an increase May-Jun 20-21, reductions in 21-22, 22-23
- COLA of 5% applied to benefits in 21-22, 7% in 22-23.
- Books and Supplies (4000's) and Services and Other Operating (5000's) include carryovers from 19-20 ending fund balance that were approved at First Interim.
- Reserve Accounts:

5% Economic Uncertainties (excludes Mental Health):	\$123,557
Deferred Maintenance for Regional Programs:	\$ 50,000
MTU Site improvement:	\$250,000
SELPA Legal Reserve:	\$325,000
Non-Mental Health Reserve (from 19-20 EFB):	\$98,555
Mental Health Reserve (from 19-20 EFB):	\$100,000

➤ **Criteria and Standards Review Summary for Items "Not Met"**

- **Deficit Spending, Salaries and Benefits, Other Revenues** – Current year expenditures include carryovers from 19-20. Recognition of prior year carryover items such as \$1,86,933 Mental Health paid to districts, \$420,253 district legal allocation and carryover, \$378,242 Non-Mental Health to be paid to districts, \$334,145 Low Incidence, \$31,976 MAA, and \$6,000 SIRAs training causes the SELPA to appear to be deficit spending. These items were identified in the Unaudited Actuals report as ending fund balance to be budgeted at First Interim.
- **Reserves** – The SELPA **does** meet its reserve requirement for the current and two subsequent years. The SACS software does not allow for use of funds in Resource 6500, Special Education, to be used to meet this requirement. SELPA's AB602 funding is all accounted for in Reserve 6500 and is therefore used to meet reserve requirements.

FISCAL IMPACT: None

RECOMMENDATIONS: The JPA Board approve and certify the Second Period Interim Report for the Fiscal Year 2020-2021 as presented.

RA/KH:lm

Santa Barbara County SELPA
FY 20-21 Second Interim Compared to FY 20-21 First Interim

		20-21	20-21	Change from Prior	
		First Interim	Second Interim		
Beginning Balance		4,006,240	4,006,240	-	Explanations and Notes
Revenue:					
Federal Revenue	8100-8299	779,603	779,603	-	
State Revenue	8300-8599	2,021,191	2,021,191	-	
Local Revenue	8600-8799	3,479,355	3,853,328	373,973	Increase of Low Incidence funding (370K) and MAA funding (9K), Decrease in LCI (Out of Home Care) 5K
s/total Revenue		6,280,149	6,654,122	373,973	
Expenditures:					
Certificated	1000-1999	341,128	341,128		
Classified	2000-2999	732,282	739,168	6,886	Salary increase for re-organization of the Office Manager Position May 1 - June 30th
Benefits	3000-3999	366,149	366,861	712	Benefits increase for re-organization of the Office Manager Position May 1 - June 30th
Books & Supplies	4000-4999	174,589	174,589		
Services & Other Operating	5000-5999	3,681,561	3,681,561		
Capital outlay	6000-6999	3,500	3,500		
Other Outgo	7300-7399	3,892,407	4,257,337	364,930	Increase is Low Incidence Funding to transfer to districts
s/total Expenditures		9,191,615	9,564,144	372,528	
Ending Balance June 30		1,094,774	1,096,218	1,445	
Reserves:					
Regional Deferred Maintenance reserve		50,000	50,000		
MTU Site Improvement Fund		250,000	250,000		
SELPA Designated Legal Reserve		325,000	325,000		
5% Set aside for Economic Contingencies		123,256	123,557		
Reserve moving office fees, SELPA-Bratton		37,246	37,246		
CPI carryover to reduce costs in 21-22		23,219	23,219		
Non-MH Reserve		100,000	98,555		
MH Reserve		100,000	100,000		
		1,008,721	1,007,577		
Unassigned		86,053	88,641		

Santa Barbara County SELPA
2020-21 First Interim With Multi-Year Projection

REF: VI-B.2 **135**

		FY 18-19				FY 19-20				FY 20-21			FY 21-22	FY 22-23
		Adopted Budget	First Interim	Second Interim	Unaudited Actuals	Adopted Budget	First Interim	Second Interim	Unaudited Actuals	Adopted Budget	First Interim	Second Interim	Multi-Year Projection	
Beginning Balance		3,892,527	3,892,527	3,187,883	3,187,883	3,324,968	3,351,683	3,351,683	3,351,683	2,807,444	4,006,240	4,006,240	2,908,302	3,364,871
Revenue:														
Federal Revenue	8100-8299	772,424	787,364	804,459	787,657	764,731	768,243	775,071	778,332	773,807	779,603	779,603	779,603	779,603
State Revenue	8300-8599	2,158,129	2,185,783	2,185,783	1,730,716	2,236,214	2,168,355	2,212,355	2,739,093	2,204,841	2,021,191	2,021,191	2,039,783	2,077,274
Local Revenue	8600-8799	2,659,991	2,738,934	2,744,777	2,782,239	2,942,307	2,918,902	2,940,427	3,078,820	3,050,678	3,479,355	3,853,328	3,890,119	3,853,328
s/total Revenue		5,590,544	5,712,081	5,735,019	5,300,612	5,943,252	5,855,500	5,927,853	6,596,245	6,029,326	6,280,149	6,654,122	6,709,505	6,710,205
Expenditures:														
Certificated	1000-1999	328,433	322,950	326,191	326,191	333,525	333,525	333,525	333,525	341,128	341,128	341,128	344,058	344,058
Classified	2000-2999	556,025	664,051	666,294	546,816	726,684	709,412	709,412	709,472	725,126	732,282	739,168	720,598	732,738
Benefits	3000-3999	307,525	294,139	290,563	363,190	315,093	305,671	332,670	292,248	368,968	366,149	366,861	378,915	410,121
Books & Supplies	4000-4999	290,051	335,447	306,657	225,804	273,570	594,659	583,059	302,247	283,614	174,589	174,589	178,081	181,642
Services & Other Operating	5000-5999	3,185,832	4,015,693	4,034,120	2,467,070	3,270,780	4,188,780	4,218,742	1,923,984	3,246,017	3,681,561	3,681,561	3,288,198	3,256,925
Capital outlay	6000-6999							4,850	-	3,500	3,500	3,500	0	0
Other Outgo	7000-7399	965,629	971,161	989,673	1,207,741	930,085	1,676,899	1,699,041	2,380,212	960,115	3,892,407	4,257,337	1,343,087	1,343,087
s/total Expenditures		5,633,495	6,603,441	6,613,498	5,136,812	5,849,737	7,808,946	7,881,299	5,941,688	5,928,468	9,191,615	9,564,144	6,252,937	6,268,572
Ending Balance June 30		3,849,575	3,001,167	2,309,404	3,351,683	3,418,483	1,398,237	1,398,237	4,006,240	2,908,302	1,094,774	1,096,218	3,364,871	3,806,504
Designated from Fund Balance:														
Board Approved Reserves:														
Regional Deferred Maintenance reserve		72,316	94,764	94,764	52,702	22,316	52,702	25,000	50,000	50,000	50,000	50,000	50,000	50,000
MTU Site Improvement Fund Reserve		800,000	800,000	800,000	800,000	800,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000
SELPA Designated Legal Reserve		325,000	325,000	325,000	325,000	325,000	325,000	325,000	325,000	325,000	325,000	325,000	325,000	325,000
SIPE Rebatefor move and SELPA-bration					16,643	14,000	15,821	15,821	37,246	37,246	37,246	37,246		
CPI carryover to reduce costs in 21-22									23,219		23,219	23,219		
5% Set aside for Economic Contingencies		234,893	136,686	139,374	134,605	98,772	134,605	152,765	106,534	106,534	123,256	123,557	122,990	122,733
Non-MH EFB Reserve							100,000	100,000	100,000		100,000	98,555		
MH EFB Reserve							100,000	100,000	100,000		100,000	100,000		
									19-20 EFB Board Approved increases 20-21 First Interim:					
Low Incidence Carryover									334,145					
MAA Carryover									31,976					
LEA Legal fees carryover									120,253					
LEA Legal fees									300,000					
PD carryover for free PD's in 20-21									36,692					
SIRAS carryover to pay for SEIS									6,000					
Non-MH EFB to districts									378,242					
MH EFB carryover to districts			566,059	566,059		790,000			1,806,933					
total designated		1,432,209	1,922,509	1,925,197	1,328,950	2,050,088	978,128	968,586	4,006,240	768,780	1,008,721	1,007,577	747,990	747,733
Unassigned		2,417,366	1,078,658	384,207	2,022,733	1,368,395	420,109	429,651	(0)	2,139,522	86,053	88,641	2,616,881	3,058,771

Multi-Year Projections Assumptions 2020-21 Second Interim

						Change from prior year			
						\$	\$		
						21-22	22-23		
						0	0		
REVENUE									
Kept Federal funding flat									
AB602 Funding						1.50%	2.98%		
SELPA COLA increase (off-the-top plus regionalized)						18,592	37,491		
AB602 change every two years to pay for CPI with off the top AB602 funds. \$60,000 less carryover of \$23,219 = \$ 36,781						36,791	(36,791)		
EXPENSES									
1xxx's	salary step-column increase and 0% COLA each year					2,930	0		
2xxx's	salary step-column increase and 0% COLA each year		Reorganization of office staff when Office Manager retires on 6-30-21.			(18,570)	12,140		
3xxx's	Benefits		Rate	Rate	% change	12,766	31,206		
			20-21	21-22	21-22			22-23	21-22
			20.7	23.0	2.30			26.30	3.30
			16.15	15.92	-0.23			18.00	2.08
					2.07				5.38
Increases applied to all 3XXX: 5% increase in 21-22 and 7% in 22-23									
4xxx's	Add 2% increase for cost of supplies					3,492	3,562		
5xxx's									
	Removal of one-time EFB allocations from 19-20 into 20-21 only.								
Wrap	Estimated step in column for Wrap teams					5,400	5,508		
Prof Dev	CPI Expenses every two years = \$60,000. Currently, carryover from 19-20 of \$23,219 to reduce costs					36,781	(36,781)		
						42,181	(31,273)		
6xxx's	Capital	Repairs to MTU Battles for shed estimated in 20-21 only				-	0		
7xxx's									
MH	The only transfers projected at this time are LCI and a percentage of Low Incidence. Assume the same for future years.					-	-		
	LCI								
	Low Incidence without carryovers								
			726,020						
			617,067						
			1,343,087						

NOTICE OF CRITERIA AND STANDARDS REVIEW. This interim report was based upon and reviewed using the state-adopted Criteria and Standards. (Pursuant to Education Code (EC) sections 33129, 41023, and 42130)

Signed: _____

JPA Administrator or Designee

Date: _____

NOTICE OF INTERIM REVIEW. All action shall be taken on this report during a regular or authorized special meeting of the governing board.

To the County Superintendent of Schools:

This interim report and certification of financial condition are hereby filed by the governing board of the JPA. (Pursuant to EC sections 41023 and 42131)

Meeting Date: March 01, 2021

Signed: _____

President of the Governing Board

CERTIFICATION OF FINANCIAL CONDITION

X POSITIVE CERTIFICATION

As President of the Governing Board of this JPA, I certify that based upon current projections this JPA will meet its financial obligations for the current fiscal year and subsequent two fiscal years.

____ QUALIFIED CERTIFICATION

As President of the Governing Board of this JPA, I certify that based upon current projections this JPA may not meet its financial obligations for the current fiscal year or two subsequent fiscal years.

____ NEGATIVE CERTIFICATION

As President of the Governing Board of this JPA, I certify that based upon current projections this JPA will be unable to meet its financial obligations for the remainder of the current fiscal year or for the subsequent fiscal year.

Contact person for additional information on the interim report:

Name: Kim Hernandez

Telephone: 805-683-1424

Title: Accountant/Business Official

E-mail: khernandez@sbceo.org

Criteria and Standards Review Summary

The following summary is automatically completed based on data provided in the Criteria and Standards Review form (Form 01CSI). Criteria and standards that are "Not Met," and supplemental information and additional fiscal indicators that are "Yes," may indicate areas of potential concern, which could affect the interim report certification, and should be carefully reviewed.

CRITERIA AND STANDARDS			Met	Not Met
1	Average Daily Attendance	This criterion is not checked for JPAs.	n/a	

CRITERIA AND STANDARDS (continued)			Met	Not Met
2	Enrollment	This criterion is not checked for JPAs.	n/a	
3	ADA to Enrollment	This criterion is not checked for JPAs.	n/a	
4	Local Control Funding Formula (LCFF) Revenue	This criterion is not checked for JPAs.	n/a	
5	Salaries and Benefits	Projected ratio of total salaries and benefits to total general fund expenditures has not changed by more than the standard for the current and two subsequent fiscal years.		X
6a	Other Revenues	Projected operating revenues (federal, other state, other local) for the current and two subsequent fiscal years have not changed by more than five percent since first interim.		X
6b	Other Expenditures	Projected operating expenditures (books and supplies, services and other expenditures) for the current and two subsequent fiscal years have not changed by more than five percent since first interim.	X	
7	Ongoing and Major Maintenance Account	This criterion is not checked for JPAs.	n/a	
8	Deficit Spending	Deficit spending, if any, has not exceeded the standard in any of the current or two subsequent fiscal years.		X
9a	Fund Balance	Projected general fund balance will be positive at the end of the current and two subsequent fiscal years.	X	
9b	Cash Balance	Projected general fund cash balance will be positive at the end of the current fiscal year.	X	
10	Reserves	Available reserves (e.g., reserve for economic uncertainties, unassigned/unappropriated amounts) meet minimum requirements for the current and two subsequent fiscal years.		X

SUPPLEMENTAL INFORMATION			No	Yes
S1	Contingent Liabilities	Have any known or contingent liabilities (e.g., financial or program audits, litigation, state compliance reviews) occurred since first interim that may impact the budget?	X	
S2	Using One-time Revenues to Fund Ongoing Expenditures	Are there ongoing general fund expenditures funded with one-time revenues that have changed since first interim by more than five percent?	X	
S3	Temporary Interfund Borrowings	Are there projected temporary borrowings between funds?	X	
S4	Contingent Revenues	Are any projected revenues for any of the current or two subsequent fiscal years contingent on reauthorization by the local government, special legislation, or other definitive act (e.g., parcel taxes, forest reserves)?	X	
S5	Contributions	Have transfers to or from the general fund to cover operating deficits changed since first interim by more than \$20,000 and more than 5% for any of the current or two subsequent fiscal years?	X	

SUPPLEMENTAL INFORMATION (continued)			No	Yes
S6	Long-term Commitments	Does the JPA have long-term (multiyear) commitments or debt agreements?	X	
		• If yes, have annual payments for the current or two subsequent fiscal years increased over prior year's (2019-20) annual payment?	n/a	
		• If yes, will funding sources used to pay long-term commitments decrease or expire prior to the end of the commitment period, or are they one-time sources?	n/a	
S7a	Postemployment Benefits Other than Pensions	Does the JPA provide postemployment benefits other than pensions (OPEB)?	X	
		• If yes, have there been changes since first interim in OPEB liabilities?	n/a	
S7b	Other Self-insurance Benefits	Does the JPA operate any self-insurance programs (e.g., workers' compensation)?	X	
		• If yes, have there been changes since first interim in self-insurance liabilities?	n/a	
S8	Status of Labor Agreements	As of second interim projections, are salary and benefit negotiations still unsettled for:		
		• Certificated? (Section S8A, Line 1b)	n/a	
		• Classified? (Section S8B, Line 1b)	n/a	
S9	Status of Other Funds	• Management/supervisor/confidential? (Section S8C, Line 1b)	n/a	
		Are any funds other than the general fund projected to have a negative fund balance at the end of the current fiscal year?	X	

ADDITIONAL FISCAL INDICATORS			No	Yes
A1	Negative Cash Flow	Do cash flow projections show that the JPA will end the current fiscal year with a negative cash balance in the general fund?	X	
A2	Independent Position Control	Is personnel position control independent from the payroll system?	X	
A3	Declining Enrollment	Is enrollment decreasing in both the prior and current fiscal years?	n/a	
A4	New Charter Schools Impacting JPA's Enrollment	Are any new charter schools operating in JPA boundaries that are impacting the JPA's enrollment, either in the prior or current fiscal years?	n/a	
A5	Salary Increases Exceed COLA	Has the JPA entered into a bargaining agreement where any of the current or subsequent fiscal years of the agreement would result in salary increases that are expected to exceed the projected state funded cost-of-living adjustment?	X	
A6	Uncapped Health Benefits	Does the JPA provide uncapped (100% employer paid) health benefits for current or retired employees?	X	
A7	Independent Financial System	Is the JPA's financial system independent from the county office system?	X	
A8	Fiscal Distress Reports	Does the JPA have any reports that indicate fiscal distress? If yes, provide copies to the COE, pursuant to EC 42127.6(a).	X	
A9	Change of JPA Director or Financial Official	Have there been personnel changes in the JPA director or financial official positions within the last 12 months?	X	

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
A. REVENUES								
1) LCFF Sources		8010-8099	0.00	0.00	0.00	0.00	0.00	0.0%
2) Federal Revenue		8100-8299	773,807.00	779,603.00	(28,100.00)	779,603.00	0.00	0.0%
3) Other State Revenue		8300-8599	2,204,841.00	2,021,191.00	1,011,614.00	2,021,191.00	0.00	0.0%
4) Other Local Revenue		8600-8799	3,050,678.00	3,479,355.00	1,629,781.54	3,853,328.88	373,973.88	10.7%
5) TOTAL, REVENUES			6,029,326.00	6,280,149.00	2,613,295.54	6,654,122.88		
B. EXPENDITURES								
1) Certificated Salaries		1000-1999	341,128.00	341,127.50	198,991.03	341,128.00	(0.50)	0.0%
2) Classified Salaries		2000-2999	725,126.00	732,282.41	417,417.27	739,167.83	(6,885.42)	-0.9%
3) Employee Benefits		3000-3999	368,967.74	366,148.52	185,190.19	366,861.42	(712.90)	-0.2%
4) Books and Supplies		4000-4999	283,614.00	174,589.00	55,831.52	174,589.00	0.00	0.0%
5) Services and Other Operating Expenditures		5000-5999	3,246,017.00	3,681,560.58	1,350,308.77	3,681,561.00	(0.42)	0.0%
6) Capital Outlay		6000-6999	3,500.00	3,500.00	0.00	3,500.00	0.00	0.0%
7) Other Outgo (excluding Transfers of Indirect Costs)		7100-7299, 7400-7499	960,115.00	3,892,407.00	546,294.00	4,257,337.00	(364,930.00)	-9.4%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	0.00	0.00	0.00	0.00	0.00	0.0%
9) TOTAL, EXPENDITURES			5,928,467.74	9,191,615.01	2,754,032.78	9,564,144.25		
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)			100,858.26	(2,911,466.01)	(140,737.24)	(2,910,021.37)		
D. OTHER FINANCING SOURCES/USES								
1) Interfund Transfers								
a) Transfers In		8900-8929	0.00	0.00	0.00	0.00	0.00	0.0%
b) Transfers Out		7600-7629	0.00	0.00	0.00	0.00	0.00	0.0%
2) Other Sources/Uses								
a) Sources		8930-8979	0.00	0.00	0.00	0.00	0.00	0.0%
b) Uses		7630-7699	0.00	0.00	0.00	0.00	0.00	0.0%
3) Contributions		8980-8999	0.00	0.00	0.00	0.00	0.00	0.0%
4) TOTAL, OTHER FINANCING SOURCES/USES			0.00	0.00	0.00	0.00		

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)			100,858.26	(2,911,466.01)	(140,737.24)	(2,910,021.37)		
F. FUND BALANCE, RESERVES								
1) Beginning Fund Balance								
a) As of July 1 - Unaudited		9791	2,807,444.00	4,006,239.78		4,006,239.78	0.00	0.0%
b) Audit Adjustments		9793	0.00	0.00		0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			2,807,444.00	4,006,239.78		4,006,239.78		
d) Other Restatements		9795	0.00	0.00		0.00	0.00	0.0%
e) Adjusted Beginning Balance (F1c + F1d)			2,807,444.00	4,006,239.78		4,006,239.78		
2) Ending Balance, June 30 (E + F1e)			2,908,302.26	1,094,773.77		1,096,218.41		
Components of Ending Fund Balance								
a) Nonspendable								
Revolving Cash		9711	0.00	0.00		0.00		
Stores		9712	0.00	0.00		0.00		
Prepaid Items		9713	0.00	0.00		0.00		
All Others		9719	0.00	0.00		0.00		
b) Restricted		9740	2,795,356.26	917,205.72		918,650.36		
c) Committed								
Stabilization Arrangements		9750	0.00	0.00		0.00		
Other Commitments		9760	0.00	0.00		0.00		
d) Assigned								
Other Assignments		9780	0.00	0.00		0.00		
e) Unassigned/Unappropriated								
Reserve for Economic Uncertainties		9789	0.00	0.00		0.00		
Unassigned/Unappropriated Amount		9790	112,946.00	177,568.05		177,568.05		

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
FEDERAL REVENUE								
Special Education Discretionary Grants		8182	773,807.00	779,603.00	(28,100.00)	779,603.00	0.00	0.0%
Child Nutrition Programs		8220	0.00	0.00	0.00	0.00	0.00	0.0%
Donated Food Commodities		8221	0.00	0.00	0.00	0.00	0.00	0.0%
Interagency Contracts Between LEAs		8285	0.00	0.00	0.00	0.00	0.00	0.0%
Pass-Through Revenues From Federal Sources		8287	0.00	0.00	0.00	0.00	0.00	0.0%
Career and Technical Education	3500-3599	8290	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Federal Revenue	All Other	8290	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, FEDERAL REVENUE			773,807.00	779,603.00	(28,100.00)	779,603.00	0.00	0.0%
OTHER STATE REVENUE								
Other State Apportionments								
All Other State Apportionments - Current Year		8311	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Apportionments - Prior Years		8319	0.00	0.00	0.00	0.00	0.00	0.0%
Child Nutrition Programs		8520	0.00	0.00	0.00	0.00	0.00	0.0%
Mandated Costs Reimbursements		8550	0.00	0.00	0.00	0.00	0.00	0.0%
Pass-Through Revenues from State Sources		8587	0.00	0.00	0.00	0.00	0.00	0.0%
California Clean Energy Jobs Act	6230	8590	0.00	0.00	0.00	0.00	0.00	0.0%
Career Technical Education Incentive Grant Program	6387	8590	0.00	0.00	0.00	0.00	0.00	0.0%
Drug/Alcohol/Tobacco Funds	6695	8590	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Revenue	All Other	8590	2,204,841.00	2,021,191.00	1,011,614.00	2,021,191.00	0.00	0.0%
TOTAL, OTHER STATE REVENUE			2,204,841.00	2,021,191.00	1,011,614.00	2,021,191.00	0.00	0.0%
OTHER LOCAL REVENUE								
Sales								
Sale of Equipment/Supplies		8631	0.00	0.00	0.00	0.00	0.00	0.0%
Sale of Publications		8632	0.00	0.00	0.00	0.00	0.00	0.0%
Food Service Sales		8634	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Sales		8639	0.00	0.00	0.00	0.00	0.00	0.0%
Leases and Rentals		8650	0.00	0.00	0.00	0.00	0.00	0.0%
Interest		8660	45,000.00	45,000.00	12,052.46	45,000.00	0.00	0.0%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	0.00	0.00	0.00	0.0%
Fees and Contracts								
Adult Education Fees		8671	0.00	0.00	0.00	0.00	0.00	0.0%
In-District Premiums/Contributions		8674	0.00	0.00	0.00	0.00	0.00	0.0%
Transportation Fees From Individuals		8675	0.00	0.00	0.00	0.00	0.00	0.0%
Interagency Services		8677	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Fees and Contracts		8689	0.00	0.00	0.00	0.00	0.00	0.0%
Other Local Revenue								
Pass-Through Revenues From Local Sources		8697	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Local Revenue		8699	677,816.00	486,288.00	52,848.08	495,321.88	9,033.88	1.9%
Tuition		8710	0.00	0.00	0.00	0.00	0.00	0.0%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
All Other Transfers In		8781-8783	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Apportionments								
Special Education SELPA Transfers								
From Districts or Charter Schools	6500	8791	2,327,862.00	2,948,067.00	1,792,714.00	3,313,007.00	364,940.00	12.4%
From County Offices	6500	8792	0.00	0.00	0.00	0.00	0.00	0.0%
From JPAs	6500	8793	0.00	0.00	(227,833.00)	0.00	0.00	0.0%
ROC/P Transfers								
From Districts or Charter Schools	6360	8791	0.00	0.00	0.00	0.00	0.00	0.0%
From County Offices	6360	8792	0.00	0.00	0.00	0.00	0.00	0.0%
From JPAs	6360	8793	0.00	0.00	0.00	0.00	0.00	0.0%
Other Transfers of Apportionments								
From Districts or Charter Schools	All Other	8791	0.00	0.00	0.00	0.00	0.00	0.0%
From County Offices	All Other	8792	0.00	0.00	0.00	0.00	0.00	0.0%
From JPAs	All Other	8793	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers In from All Others		8799	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER LOCAL REVENUE			3,050,678.00	3,479,355.00	1,629,781.54	3,853,328.88	373,973.88	10.7%
TOTAL, REVENUES			6,029,326.00	6,280,149.00	2,613,295.54	6,654,122.88		

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
CERTIFICATED SALARIES								
Certificated Teachers' Salaries		1100	0.00	0.00	0.00	0.00	0.00	0.0%
Certificated Pupil Support Salaries		1200	0.00	0.00	0.00	0.00	0.00	0.0%
Certificated Supervisors' and Administrators' Salaries		1300	282,038.00	282,037.50	164,521.63	282,038.00	(0.50)	0.0%
Other Certificated Salaries		1900	59,090.00	59,090.00	34,469.40	59,090.00	0.00	0.0%
TOTAL, CERTIFICATED SALARIES			341,128.00	341,127.50	198,991.03	341,128.00	(0.50)	0.0%
CLASSIFIED SALARIES								
Classified Instructional Salaries		2100	0.00	0.00	0.00	0.00	0.00	0.0%
Classified Support Salaries		2200	0.00	0.00	0.00	0.00	0.00	0.0%
Classified Supervisors' and Administrators' Salaries		2300	0.00	0.00	0.00	0.00	0.00	0.0%
Clerical, Technical and Office Salaries		2400	158,019.00	158,015.00	91,651.00	160,914.00	(2,899.00)	-1.8%
Other Classified Salaries		2900	567,107.00	574,267.41	325,766.27	578,253.83	(3,986.42)	-0.7%
TOTAL, CLASSIFIED SALARIES			725,126.00	732,282.41	417,417.27	739,167.83	(6,885.42)	-0.9%
EMPLOYEE BENEFITS								
STRS		3101-3102	101,319.07	98,078.09	31,618.94	98,078.09	0.00	0.0%
PERS		3201-3202	87,397.00	91,517.12	52,533.27	92,091.71	(574.59)	-0.6%
OASDI/Medicare/Alternative		3301-3302	15,460.67	15,528.22	9,022.38	15,627.84	(99.62)	-0.6%
Health and Welfare Benefits		3401-3402	158,938.00	154,960.00	88,500.04	154,960.00	0.00	0.0%
Unemployment Insurance		3501-3502	532.00	536.89	311.08	540.23	(3.34)	-0.6%
Workers' Compensation		3601-3602	5,321.00	5,528.20	3,204.48	5,563.55	(35.35)	-0.6%
OPEB, Allocated		3701-3702	0.00	0.00	0.00	0.00	0.00	0.0%
OPEB, Active Employees		3751-3752	0.00	0.00	0.00	0.00	0.00	0.0%
Other Employee Benefits		3901-3902	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, EMPLOYEE BENEFITS			368,967.74	366,148.52	185,190.19	366,861.42	(712.90)	-0.2%
BOOKS AND SUPPLIES								
Approved Textbooks and Core Curricula Materials		4100	0.00	0.00	0.00	0.00	0.00	0.0%
Books and Other Reference Materials		4200	0.00	0.00	0.00	0.00	0.00	0.0%
Materials and Supplies		4300	277,814.00	168,789.00	55,831.52	168,789.00	0.00	0.0%
Noncapitalized Equipment		4400	5,800.00	5,800.00	0.00	5,800.00	0.00	0.0%
Food		4700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, BOOKS AND SUPPLIES			283,614.00	174,589.00	55,831.52	174,589.00	0.00	0.0%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
SERVICES AND OTHER OPERATING EXPENDITURES								
Subagreements for Services		5100	0.00	0.00	0.00	0.00	0.00	0.0%
Travel and Conferences		5200	97,731.00	95,731.00	10,520.48	95,731.00	0.00	0.0%
Dues and Memberships		5300	4,000.00	4,000.00	2,700.00	4,000.00	0.00	0.0%
Insurance		5400-5450	4,375.00	4,375.00	4,375.00	4,375.00	0.00	0.0%
Operations and Housekeeping Services		5500	0.00	0.00	0.00	0.00	0.00	0.0%
Rentals, Leases, Repairs, and Noncapitalized Improvements		5600	97,474.00	94,632.00	54,931.90	94,632.00	0.00	0.0%
Transfers of Direct Costs		5710	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Direct Costs - Interfund		5750	0.00	0.00	0.00	0.00	0.00	0.0%
Professional/Consulting Services and Operating Expenditures		5800	3,009,197.00	3,449,582.58	1,266,421.72	3,449,583.00	(0.42)	0.0%
Communications		5900	33,240.00	33,240.00	11,359.67	33,240.00	0.00	0.0%
TOTAL, SERVICES AND OTHER OPERATING EXPENDITURES			3,246,017.00	3,681,560.58	1,350,308.77	3,681,561.00	(0.42)	0.0%
CAPITAL OUTLAY								
Land		6100	3,500.00	3,500.00	0.00	3,500.00	0.00	0.0%
Land Improvements		6170	0.00	0.00	0.00	0.00	0.00	0.0%
Buildings and Improvements of Buildings		6200	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment		6400	0.00	0.00	0.00	0.00	0.00	0.0%
Equipment Replacement		6500	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CAPITAL OUTLAY			3,500.00	3,500.00	0.00	3,500.00	0.00	0.0%
OTHER OUTGO (excluding Transfers of Indirect Costs)								
Tuition								
Tuition, Excess Costs, and/or Deficit Payments Payments to Districts or Charter Schools		7141	30,000.00	30,000.00	0.00	30,000.00	0.00	0.0%
Payments to County Offices		7142	0.00	0.00	0.00	0.00	0.00	0.0%
Payments to JPAs		7143	0.00	0.00	0.00	0.00	0.00	0.0%
Other Transfers Out								
Transfers of Pass-Through Revenues To Districts or Charter Schools		7211	0.00	0.00	0.00	0.00	0.00	0.0%
To County Offices		7212	0.00	0.00	0.00	0.00	0.00	0.0%
To JPAs		7213	0.00	0.00	0.00	0.00	0.00	0.0%
Special Education SELPA Transfers of Apportionments To Districts or Charter Schools	6500	7221	0.00	0.00	0.00	0.00	0.00	0.0%
To County Offices	6500	7222	0.00	0.00	0.00	0.00	0.00	0.0%
To JPAs	6500	7223	0.00	0.00	0.00	0.00	0.00	0.0%
ROC/P Transfers of Apportionments To Districts or Charter Schools	6360	7221	0.00	0.00	0.00	0.00	0.00	0.0%
To County Offices	6360	7222	0.00	0.00	0.00	0.00	0.00	0.0%
To JPAs	6360	7223	0.00	0.00	0.00	0.00	0.00	0.0%
Other Transfers of Apportionments	All Other	7221-7223	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers		7281-7283	930,115.00	3,862,407.00	546,294.00	4,227,337.00	(364,930.00)	-9.4%
All Other Transfers Out to All Others		7299	0.00	0.00	0.00	0.00	0.00	0.0%
Debt Service								
Debt Service - Interest		7438	0.00	0.00	0.00	0.00	0.00	0.0%
Other Debt Service - Principal		7439	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)			960,115.00	3,892,407.00	546,294.00	4,257,337.00	(364,930.00)	-9.4%

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
OTHER OUTGO - TRANSFERS OF INDIRECT COSTS								
Transfers of Indirect Costs		7310	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Indirect Costs - Interfund		7350	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER OUTGO - TRANSFERS OF INDIRECT COSTS			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, EXPENDITURES			5,928,467.74	9,191,615.01	2,754,032.78	9,564,144.25		

Description	Resource Codes	Object Codes	Original Budget (A)	Board Approved Operating Budget (B)	Actuals To Date (C)	Projected Year Totals (D)	Difference (Col B & D) (E)	% Diff Column B & D (F)
INTERFUND TRANSFERS								
INTERFUND TRANSFERS IN								
From: Special Reserve Fund		8912	0.00	0.00	0.00	0.00	0.00	0.0%
Other Authorized Interfund Transfers In		8919	0.00	0.00	0.00	0.00	0.00	0.0%
(a) TOTAL, INTERFUND TRANSFERS IN			0.00	0.00	0.00	0.00	0.00	0.0%
INTERFUND TRANSFERS OUT								
To: Special Reserve Fund		7612	0.00	0.00	0.00	0.00	0.00	0.0%
To: State School Building Fund/ County School Facilities Fund		7613	0.00	0.00	0.00	0.00	0.00	0.0%
To: Cafeteria Fund		7616	0.00	0.00	0.00	0.00	0.00	0.0%
Other Authorized Interfund Transfers Out		7619	0.00	0.00	0.00	0.00	0.00	0.0%
(b) TOTAL, INTERFUND TRANSFERS OUT			0.00	0.00	0.00	0.00	0.00	0.0%
OTHER SOURCES/USES								
SOURCES								
Long-Term Debt Proceeds								
Proceeds from Certificates of Participation		8971	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Capital Leases		8972	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from Lease Revenue Bonds		8973	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Financing Sources		8979	0.00	0.00	0.00	0.00	0.00	0.0%
(c) TOTAL, SOURCES			0.00	0.00	0.00	0.00	0.00	0.0%
USES								
All Other Financing Uses		7699	0.00	0.00	0.00	0.00	0.00	0.0%
(d) TOTAL, USES			0.00	0.00	0.00	0.00	0.00	0.0%
CONTRIBUTIONS								
Contributions from Unrestricted Revenues		8980	0.00	0.00	0.00	0.00	0.00	0.0%
Contributions from Restricted Revenues		8990	0.00	0.00	0.00	0.00	0.00	0.0%
(e) TOTAL, CONTRIBUTIONS			0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER FINANCING SOURCES/USES (a - b + c - d + e)			0.00	0.00	0.00	0.00		

Santa Barbara County SELPA JPA
Santa Barbara County

Second Interim
General Fund
Exhibit: Restricted Balance Detail

42 40378 0000000
Form 01I

Resource	Description	2020/21 Projected Year Totals
6500	Special Education	799,966.74
6512	Special Ed: Mental Health Services	100,000.37
6546	Mental Health-Related Services	18,683.25
Total, Restricted Balance		<u>918,650.36</u>

Part I - General Administrative Share of Plant Services Costs

California's indirect cost plan allows that the general administrative costs in the indirect cost pool may include that portion of plant services costs (maintenance and operations costs and facilities rents and leases costs) attributable to the general administrative offices. The calculation of the plant services costs attributed to general administration and included in the pool is standardized and automated using the percentage of salaries and benefits relating to general administration as proxy for the percentage of square footage occupied by general administration.

A. Salaries and Benefits - Other General Administration and Centralized Data Processing

1. Salaries and benefits paid through payroll (Funds 01, 09, and 62, objects 1000-3999 except 3701-3702)
(Functions 7200-7700, goals 0000 and 9000) 0.00
2. Contracted general administrative positions not paid through payroll
 - a. Enter the costs, if any, of general administrative positions performing services ON SITE but paid through a contract, rather than through payroll, in functions 7200-7700, goals 0000 and 9000, Object 5800. 0.00
 - b. If an amount is entered on Line A2a, provide the title, duties, and approximate FTE of each general administrative position paid through a contract. Retain supporting documentation in case of audit.

N/A

B. Salaries and Benefits - All Other Activities

1. Salaries and benefits paid through payroll (Funds 01, 09, and 62, objects 1000-3999 except 3701-3702)
(Functions 1000-6999, 7100-7180, & 8100-8400; Functions 7200-7700, all goals except 0000 & 9000) 1,447,157.25

C. Percentage of Plant Services Costs Attributable to General Administration

(Line A1 plus Line A2a, divided by Line B1; zero if negative) (See Part III, Lines A5 and A6) 0.00%

Part II - Adjustments for Employment Separation Costs

When an employee separates from service, the local educational agency (LEA) may incur costs associated with the separation in addition to the employee's regular salary and benefits for the final pay period. These additional costs can be categorized as "normal" or "abnormal or mass" separation costs.

Normal separation costs include items such as pay for accumulated unused leave or routine severance pay authorized by governing board policy. Normal separation costs are not allowable as direct costs to federal programs, but are allowable as indirect costs. State programs may have similar restrictions. Where federal or state program guidelines required that the LEA charge an employee's normal separation costs to an unrestricted resource rather than to the restricted program in which the employee worked, the LEA may identify and enter these costs on Line A for inclusion in the indirect cost pool.

Abnormal or mass separation costs are those costs resulting from actions taken by an LEA to influence employees to terminate their employment earlier than they normally would have. Abnormal or mass separation costs include retirement incentives such as a Golden Handshake or severance packages negotiated to effect termination. Abnormal or mass separation costs may not be charged to federal programs as either direct costs or indirect costs. Where an LEA paid abnormal or mass separation costs on behalf of positions in general administrative functions included in the indirect cost pool, the LEA must identify and enter these costs on Line B for exclusion from the pool.

A. Normal Separation Costs (optional)

Enter any normal separation costs paid on behalf of employees of restricted state or federal programs that were charged to an unrestricted resource (0000-1999) in funds 01, 09, and 62 with functions 1000-6999 or 8100-8400 rather than to the restricted program. These costs will be moved in Part III from base costs to the indirect cost pool. Retain supporting documentation. _____

B. Abnormal or Mass Separation Costs (required)

Enter any abnormal or mass separation costs paid on behalf of general administrative positions charged to unrestricted resources (0000-1999) in funds 01, 09, and 62 with functions 7200-7700. These costs will be moved in Part III from the indirect cost pool to base costs. If none, enter zero. 0.00

Part III - Indirect Cost Rate Calculation (Funds 01, 09, and 62, unless indicated otherwise)

A. Indirect Costs

1. Other General Administration, less portion charged to restricted resources or specific goals (Functions 7200-7600, objects 1000-5999, minus Line B9)	0.00
2. Centralized Data Processing, less portion charged to restricted resources or specific goals (Function 7700, objects 1000-5999, minus Line B10)	0.00
3. External Financial Audit - Single Audit (Function 7190, resources 0000-1999, goals 0000 and 9000, objects 5000-5999)	0.00
4. Staff Relations and Negotiations (Function 7120, resources 0000-1999, goals 0000 and 9000, objects 1000-5999)	0.00
5. Plant Maintenance and Operations (portion relating to general administrative offices only) (Functions 8100-8400, objects 1000-5999 except 5100, times Part I, Line C)	0.00
6. Facilities Rents and Leases (portion relating to general administrative offices only) (Function 8700, resources 0000-1999, objects 1000-5999 except 5100, times Part I, Line C)	0.00
7. Adjustment for Employment Separation Costs	
a. Plus: Normal Separation Costs (Part II, Line A)	0.00
b. Less: Abnormal or Mass Separation Costs (Part II, Line B)	0.00
8. Total Indirect Costs (Lines A1 through A7a, minus Line A7b)	0.00
9. Carry-Forward Adjustment (Part IV, Line F)	0.00
10. Total Adjusted Indirect Costs (Line A8 plus Line A9)	0.00

B. Base Costs

1. Instruction (Functions 1000-1999, objects 1000-5999 except 5100)	0.00
2. Instruction-Related Services (Functions 2000-2999, objects 1000-5999 except 5100)	5,262,527.25
3. Pupil Services (Functions 3000-3999, objects 1000-5999 except 4700 and 5100)	0.00
4. Ancillary Services (Functions 4000-4999, objects 1000-5999 except 5100)	0.00
5. Community Services (Functions 5000-5999, objects 1000-5999 except 5100)	0.00
6. Enterprise (Function 6000, objects 1000-5999 except 4700 and 5100)	0.00
7. Board and Superintendent (Functions 7100-7180, objects 1000-5999, minus Part III, Line A4)	7,540.00
8. External Financial Audit - Single Audit and Other (Functions 7190-7191, objects 5000-5999, minus Part III, Line A3)	0.00
9. Other General Administration (portion charged to restricted resources or specific goals only) (Functions 7200-7600, resources 2000-9999, objects 1000-5999; Functions 7200-7600, resources 0000-1999, all goals except 0000 and 9000, objects 1000-5999)	0.00
10. Centralized Data Processing (portion charged to restricted resources or specific goals only) (Function 7700, resources 2000-9999, objects 1000-5999; Function 7700, resources 0000-1999, all goals except 0000 and 9000, objects 1000-5999)	0.00
11. Plant Maintenance and Operations (all except portion relating to general administrative offices) (Functions 8100-8400, objects 1000-5999 except 5100, minus Part III, Line A5)	33,240.00
12. Facilities Rents and Leases (all except portion relating to general administrative offices) (Function 8700, objects 1000-5999 except 5100, minus Part III, Line A6)	0.00
13. Adjustment for Employment Separation Costs	
a. Less: Normal Separation Costs (Part II, Line A)	0.00
b. Plus: Abnormal or Mass Separation Costs (Part II, Line B)	0.00
14. Student Activity (Fund 08, functions 4000-5999, objects 1000-5999 except 5100)	0.00
15. Adult Education (Fund 11, functions 1000-6999, 8100-8400, and 8700, objects 1000-5999 except 5100)	0.00
16. Child Development (Fund 12, functions 1000-6999, 8100-8400 & 8700, objects 1000-5999 except 4700 & 5100)	0.00
17. Cafeteria (Funds 13 & 61, functions 1000-6999, 8100-8400 & 8700, objects 1000-5999 except 4700 & 5100)	0.00
18. Foundation (Funds 19 & 57, functions 1000-6999, 8100-8400 & 8700, objects 1000-5999 except 4700 & 5100)	0.00
19. Total Base Costs (Lines B1 through B12 and Lines B13b through B18, minus Line B13a)	5,303,307.25

C. Straight Indirect Cost Percentage Before Carry-Forward Adjustment

(For information only - not for use when claiming/recovering indirect costs) (Line A8 divided by Line B19)	0.00%
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D. Preliminary Proposed Indirect Cost Rate

(For final approved fixed-with-carry-forward rate for use in 2022-23 see www.cde.ca.gov/fg/ac/ic/) (Line A10 divided by Line B19)	0.00%
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Part IV - Carry-forward Adjustment

The carry-forward adjustment is an after-the-fact adjustment for the difference between indirect costs recoverable using the indirect cost rate approved for use in a given year, and the actual indirect costs incurred in that year. The carry-forward adjustment eliminates the need for LEAs to file amended federal reports when their actual indirect costs vary from the estimated indirect costs on which the approved rate was based.

Where the ratio of indirect costs incurred in the current year is less than the estimated ratio of indirect costs on which the approved rate for use in the current year was based, the carry-forward adjustment is limited by using either the approved rate times current year base costs, or the highest rate actually used to recover costs from any program times current year base costs, if the highest rate used was less than the approved rate. Rates used to recover costs from programs are displayed in Exhibit A.

A. Indirect costs incurred in the current year (Part III, Line A8)	0.00
B. Carry-forward adjustment from prior year(s)	
1. Carry-forward adjustment from the second prior year	0.00
2. Carry-forward adjustment amount deferred from prior year(s), if any	0.00
C. Carry-forward adjustment for under- or over-recovery in the current year	
1. Under-recovery: Part III, Line A8, plus carry-forward adjustment from prior years, minus (approved indirect cost rate (0%) times Part III, Line B19); zero if negative	0.00
2. Over-recovery: Part III, Line A8, plus carry-forward adjustment from prior years, minus the lesser of (approved indirect cost rate (0%) times Part III, Line B19) or (the highest rate used to recover costs from any program (0%) times Part III, Line B19); zero if positive	0.00
D. Preliminary carry-forward adjustment (Line C1 or C2)	0.00
E. Optional allocation of negative carry-forward adjustment over more than one year	
Where a negative carry-forward adjustment causes the proposed approved rate to fall below zero or would reduce the rate at which the LEA could recover indirect costs to such an extent that it would cause the LEA significant fiscal harm, the LEA may request that the carry-forward adjustment be allocated over more than one year. Where allocation of a negative carry-forward adjustment over more than one year does not resolve a negative rate, the CDE will work with the LEA on a case-by-case basis to establish an approved rate.	
Option 1. Preliminary proposed approved rate (Part III, Line D) if entire negative carry-forward adjustment is applied to the current year calculation:	not applicable
Option 2. Preliminary proposed approved rate (Part III, Line D) if one-half of negative carry-forward adjustment is applied to the current year calculation and the remainder is deferred to one or more future years:	not applicable
Option 3. Preliminary proposed approved rate (Part III, Line D) if one-third of negative carry-forward adjustment is applied to the current year calculation and the remainder is deferred to one or more future years:	not applicable
LEA request for Option 1, Option 2, or Option 3	1
F. Carry-forward adjustment used in Part III, Line A9 (Line D minus amount deferred if Option 2 or Option 3 is selected)	0.00

Second Interim

Santa Barbara County SELPA JPA 2020-21 Projected Year Totals 42 40378 0000000
 Santa Barbara County Exhibit A: Indirect Cost Rates Charged to Programs Form ICR

Approved indirect cost rate: 0.00%
 Highest rate used in any program: 0.00%

<u>Fund</u>	<u>Resource</u>	<u>Eligible Expenditures (Objects 1000-5999 except Object 5100)</u>	<u>Indirect Costs Charged (Objects 7310 and 7350)</u>	<u>Rate Used</u>
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Description	Object Codes	Projected Year Totals (Form 011) (A)	% Change (Cols. C-A/A) (B)	2021-22 Projection (C)	% Change (Cols. E-C/C) (D)	2022-23 Projection (E)
(Enter projections for subsequent years 1 and 2 in Columns C and E; current year - Column A - is extracted)						
A. REVENUES AND OTHER FINANCING SOURCES						
1. LCFF/Revenue Limit Sources	8010-8099					
2. Federal Revenues	8100-8299	779,603.00	0.00%	779,603.00	0.00%	779,603.00
3. Other State Revenues	8300-8599	2,021,191.00	0.92%	2,039,783.00	1.84%	2,077,274.00
4. Other Local Revenues	8600-8799	3,853,328.88	0.95%	3,890,119.00	-0.95%	3,853,328.00
5. Other Financing Sources						
a. Transfers In	8900-8929	0.00	0.00%	0.00	0.00%	0.00
b. Other Sources	8930-8979	0.00	0.00%	0.00	0.00%	0.00
c. Contributions	8980-8999	0.00	0.00%	0.00	0.00%	0.00
6. Total (Sum lines A1 thru A5c)		6,654,122.88	0.83%	6,709,505.00	0.01%	6,710,205.00
B. EXPENDITURES AND OTHER FINANCING USES						
1. Certificated Salaries						
a. Base Salaries				341,128.00		344,058.00
b. Step & Column Adjustment				2,930.00		0.00
c. Cost-of-Living Adjustment				0.00		0.00
d. Other Adjustments				0.00		0.00
e. Total Certificated Salaries (Sum lines B1a thru B1d)	1000-1999	341,128.00	0.86%	344,058.00	0.00%	344,058.00
2. Classified Salaries						
a. Base Salaries				739,167.83		720,597.83
b. Step & Column Adjustment				(18,570.00)		12,140.00
c. Cost-of-Living Adjustment				0.00		0.00
d. Other Adjustments				0.00		0.00
e. Total Classified Salaries (Sum lines B2a thru B2d)	2000-2999	739,167.83	-2.51%	720,597.83	1.68%	732,737.83
3. Employee Benefits	3000-3999	366,861.42	3.29%	378,915.00	8.24%	410,121.00
4. Books and Supplies	4000-4999	174,589.00	2.00%	178,081.00	2.00%	181,642.00
5. Services and Other Operating Expenditures	5000-5999	3,681,561.00	-10.68%	3,288,198.00	-0.95%	3,256,925.00
6. Capital Outlay	6000-6999	3,500.00	-100.00%	0.00	0.00%	0.00
7. Other Outgo (excluding Transfers of Indirect Costs)	7100-7299, 7400-7499	4,257,337.00	-68.45%	1,343,087.00	0.00%	1,343,087.00
8. Other Outgo - Transfers of Indirect Costs	7300-7399	0.00	0.00%	0.00	0.00%	0.00
9. Other Financing Uses						
a. Transfers Out	7600-7629	0.00	0.00%	0.00	0.00%	0.00
b. Other Uses	7630-7699	0.00	0.00%	0.00	0.00%	0.00
10. Other Adjustments (Explain in Section G below)				0.00		0.00
11. Total (Sum lines B1 thru B10)		9,564,144.25	-34.62%	6,252,936.83	0.25%	6,268,570.83
C. NET INCREASE (DECREASE) IN FUND BALANCE						
(Line A6 minus line B11)		(2,910,021.37)		456,568.17		441,634.17
D. FUND BALANCE						
1. Net Beginning Fund Balance (Form 011, line F1e)		4,006,239.78		1,096,218.41		1,552,786.58
2. Ending Fund Balance (Sum lines C and D1)		1,096,218.41		1,552,786.58		1,994,420.75
3. Components of Ending Fund Balance (Form 011)						
(Enter estimated projections for subsequent years 1 and 2 in Columns C and E; current year - Column A - is extracted)						
a. Nonspendable	9710-9719	0.00		0.00		0.00
b. Restricted	9740	918,650.36		0.00		0.00
c. Committed						
1. Stabilization Arrangements	9750	0.00		0.00		0.00
2. Other Commitments	9760	0.00		0.00		0.00
d. Assigned	9780	0.00		0.00		0.00
e. Unassigned/Unappropriated						
1. Reserve for Economic Uncertainties	9789	0.00		0.00		0.00
2. Unassigned/Unappropriated	9790	177,568.05		1,552,786.58		1,994,420.75
f. Total Components of Ending Fund Balance (Line D3f must agree with line D2)		1,096,218.41		1,552,786.58		1,994,420.75

Description	Object Codes	Projected Year Totals (Form 011) (A)	% Change (Cols. C-A/A) (B)	2021-22 Projection (C)	% Change (Cols. E-C/C) (D)	2022-23 Projection (E)
E. AVAILABLE RESERVES						
1. General Fund						
a. Stabilization Arrangements	9750	0.00		0.00		0.00
b. Reserve for Economic Uncertainties	9789	0.00		0.00		0.00
c. Unassigned/Unappropriated	9790	177,568.05		1,552,786.58		1,994,420.75
d. Negative Restricted Ending Balances (Negative resources 2000-9999) (Enter projections)	979Z			0.00		0.00
(Enter other reserve projections in Columns C and E for subsequent years 1 and 2; current year - Column A - is extracted.)						
2. Special Reserve Fund - Noncapital Outlay (Fund 17)						
a. Stabilization Arrangements	9750	0.00		0.00		0.00
b. Reserve for Economic Uncertainties	9789	0.00		0.00		0.00
c. Unassigned/Unappropriated	9790	0.00		0.00		0.00
3. Total Available Reserves - by Amount (Sum lines E1a thru E2c)		177,568.05		1,552,786.58		1,994,420.75
4. Total Available Reserves - by Percent (Line E3 divided by Line F2)		1.86%		24.83%		31.82%
F. RECOMMENDED RESERVES						
1. JPA ADA						
Used to determine the reserve standard percentage level on Line F5 (Enter ADA for current and two subsequent years, if applicable)		0.00		0.00		0.00
2. Total Expenditures and Other Financing Uses (Line B11)		9,564,144.25		6,252,936.83		6,268,570.83
3. Less: Special Education Pass-through (Not applicable for JPAs)		N/A		N/A		N/A
4. Sub-Total (Line F2 minus F3)		9,564,144.25		6,252,936.83		6,268,570.83
5. Reserve Standard Percentage Level (Refer to Form 01CSI, Criterion 10 for calculation details)		5%		5%		5%
6. Reserve Standard - By Percent (Line F4 times F5)		478,207.21		312,646.84		313,428.54
7. Reserve Standard - By Amount (Refer to Form 01CSI, Criterion 10 for calculation details)		71,000.00		71,000.00		71,000.00
8. Reserve Standard (Greater of Line F6 or F7)		478,207.21		312,646.84		313,428.54
9. Available Reserves (Line E3) Meet the Reserve Standard (Line F8)		NO		YES		YES
G. ASSUMPTIONS						
Please provide below or on a separate attachment, the assumptions used to determine the projections for the first and second subsequent fiscal years. Further, please include an explanation for any significant expenditure adjustments projected in lines B1d, B2d, and B10. For additional information, please refer to the Budget Assumptions section of the SACS Financial Reporting Software User Guide.						

	Object	Beginning Balances (Ref. Only)	July	August	September	October	November	December	January	February
ACTUALS THROUGH THE MONTH OF (Enter Month Name):										
A. BEGINNING CASH			2,230,175.00	2,412,321.38	3,509,307.11	3,444,370.40	4,059,678.75	4,438,749.23	4,352,647.02	4,249,363.07
B. RECEIPTS										
LCFF/Revenue Limit Sources										
Principal Apportionment	8010-8019									
Property Taxes	8020-8079									
Miscellaneous Funds	8080-8099									
Federal Revenue	8100-8299			1,886.00			(29,986.00)			
Other State Revenue	8300-8599			562,229.00		1,043,860.00	(609,371.00)	14,896.00		
Other Local Revenue	8600-8799		157,046.85	388,846.14	266,317.40	277,696.97	(25,313.74)	262,460.11	302,727.81	147,698.00
Interfund Transfers In	8910-8929									
All Other Financing Sources	8930-8979									
TOTAL RECEIPTS			157,046.85	952,961.14	266,317.40	1,321,556.97	(664,670.74)	277,356.11	302,727.81	147,698.00
C. DISBURSEMENTS										
Certificated Salaries	1000-1999		28,427.29	28,427.29	28,427.29	28,427.29	28,427.29	28,427.29	28,427.29	28,427.29
Classified Salaries	2000-2999		51,877.68	51,877.68	62,647.45	62,647.45	62,647.45	62,764.60	62,954.95	62,968.96
Employee Benefits	3000-3999		24,100.63	24,708.43	28,556.73	25,122.00	27,554.83	27,564.50	27,583.07	23,818.09
Books and Supplies	4000-4999		714.46	9,860.52	4,154.33	21,747.88	1,451.11	5,439.06	12,464.16	23,751.50
Services	5000-5999		35,067.78	(33,712.51)	207,468.31	22,010.00	776,130.06	155,762.87	187,582.29	428,571.43
Capital Outlay	6000-6599								3,500.00	
Other Outgo	7000-7499					546,294.00		83,500.00	83,500.00	546,294.00
Interfund Transfers Out	7600-7629									
All Other Financing Uses	7630-7699									
TOTAL DISBURSEMENTS			140,187.84	81,161.41	331,254.11	706,248.62	896,210.74	363,458.32	406,011.76	1,113,831.27
D. BALANCE SHEET ITEMS										
<u>Assets and Deferred Outflows</u>										
Cash Not In Treasury	9111-9199		312,816.83							
Accounts Receivable	9200-9299		44,284.70	225,186.00			1,975,116.46			430,079.00
Due From Other Funds	9310									
Stores	9320									
Prepaid Expenditures	9330									
Other Current Assets	9340									
Deferred Outflows of Resources	9490									
SUBTOTAL		0.00	357,101.53	225,186.00	0.00	0.00	1,975,116.46	0.00	0.00	430,079.00
<u>Liabilities and Deferred Inflows</u>										
Accounts Payable	9500-9599		191,814.16				35,164.50			
Due To Other Funds	9610									
Current Loans	9640									
Unearned Revenues	9650									
Deferred Inflows of Resources	9690									
SUBTOTAL		0.00	191,814.16	0.00	0.00	0.00	35,164.50	0.00	0.00	0.00
<u>Nonoperating</u>										
Suspense Clearing	9910									
TOTAL BALANCE SHEET ITEMS		0.00	165,287.37	225,186.00	0.00	0.00	1,939,951.96	0.00	0.00	430,079.00
E. NET INCREASE/DECREASE (B - C + D)			182,146.38	1,096,985.73	(64,936.71)	615,308.35	379,070.48	(86,102.21)	(103,283.95)	(536,054.27)
F. ENDING CASH (A + E)			2,412,321.38	3,509,307.11	3,444,370.40	4,059,678.75	4,438,749.23	4,352,647.02	4,249,363.07	3,713,308.80
G. ENDING CASH, PLUS CASH ACCRUALS AND ADJUSTMENTS										

	Object	March	April	May	June	Accruals	Adjustments	TOTAL	BUDGET
ACTUALS THROUGH THE MONTH OF (Enter Month Name):									
A. BEGINNING CASH		3,713,308.80	2,861,759.97	3,390,772.14	1,976,484.15				
B. RECEIPTS									
LCFF/Revenue Limit Sources									
Principal Apportionment	8010-8019							0.00	0.00
Property Taxes	8020-8079							0.00	0.00
Miscellaneous Funds	8080-8099							0.00	0.00
Federal Revenue	8100-8299					807,703.00		779,603.00	779,603.00
Other State Revenue	8300-8599		1,009,577.00					2,021,191.00	2,021,191.00
Other Local Revenue	8600-8799	56,565.00	427,549.00	64,402.00	19,136.00	1,508,197.34		3,853,328.88	3,853,328.88
Interfund Transfers In	8910-8929							0.00	0.00
All Other Financing Sources	8930-8979							0.00	0.00
TOTAL RECEIPTS		56,565.00	1,437,126.00	64,402.00	19,136.00	2,315,900.34	0.00	6,654,122.88	6,654,122.88
C. DISBURSEMENTS									
Certificated Salaries	1000-1999	28,427.29	28,427.29	28,427.29	28,427.81			341,128.00	341,128.00
Classified Salaries	2000-2999	62,940.61	62,940.61	66,450.20	66,450.19			739,167.83	739,167.83
Employee Benefits	3000-3999	34,077.00	34,077.00	44,849.57	44,849.57			366,861.42	366,861.42
Books and Supplies	4000-4999	23,751.50	23,751.50	23,751.50	23,751.48			174,589.00	174,589.00
Services	5000-5999	428,571.43	428,571.43	428,571.43	616,966.48			3,681,561.00	3,681,561.00
Capital Outlay	6000-6599							3,500.00	3,500.00
Other Outgo	7000-7499	330,346.00	330,346.00	886,640.00	904,123.00	546,294.00		4,257,337.00	4,257,337.00
Interfund Transfers Out	7600-7629							0.00	0.00
All Other Financing Uses	7630-7699							0.00	0.00
TOTAL DISBURSEMENTS		908,113.83	908,113.83	1,478,689.99	1,684,568.53	546,294.00	0.00	9,564,144.25	9,564,144.25
D. BALANCE SHEET ITEMS									
<u>Assets and Deferred Outflows</u>									
Cash Not In Treasury	9111-9199							312,816.83	
Accounts Receivable	9200-9299				552,681.50			3,227,347.66	
Due From Other Funds	9310							0.00	
Stores	9320							0.00	
Prepaid Expenditures	9330							0.00	
Other Current Assets	9340							0.00	
Deferred Outflows of Resources	9490							0.00	
SUBTOTAL		0.00	0.00	0.00	552,681.50	0.00	0.00	3,540,164.49	
<u>Liabilities and Deferred Inflows</u>									
Accounts Payable	9500-9599							226,978.66	
Due To Other Funds	9610							0.00	
Current Loans	9640							0.00	
Unearned Revenues	9650							0.00	
Deferred Inflows of Resources	9690							0.00	
SUBTOTAL		0.00	0.00	0.00	0.00	0.00	0.00	226,978.66	
<u>Nonoperating</u>									
Suspense Clearing	9910							0.00	
TOTAL BALANCE SHEET ITEMS		0.00	0.00	0.00	552,681.50	0.00	0.00	3,313,185.83	
E. NET INCREASE/DECREASE (B - C + D)		(851,548.83)	529,012.17	(1,414,287.99)	(1,112,751.03)	1,769,606.34	0.00	403,164.46	(2,910,021.37)
F. ENDING CASH (A + E)		2,861,759.97	3,390,772.14	1,976,484.15	863,733.12				
G. ENDING CASH, PLUS CASH ACCRUALS AND ADJUSTMENTS								2,633,339.46	

	Object	Beginning Balances (Ref. Only)	July	August	September	October	November	December	January	February
ACTUALS THROUGH THE MONTH OF (Enter Month Name):										
A. BEGINNING CASH			863,733.12	728,970.55	1,018,618.98	1,275,070.41	2,536,300.45	2,265,610.99	1,864,493.53	1,463,376.07
B. RECEIPTS										
LCFF/Revenue Limit Sources										
Principal Apportionment	8010-8019									
Property Taxes	8020-8079									
Miscellaneous Funds	8080-8099									
Federal Revenue	8100-8299									779,603.00
Other State Revenue	8300-8599					1,019,891.50				
Other Local Revenue	8600-8799		174,296.00	174,296.00	307,424.00	271,543.00	307,424.00	307,424.00	307,424.00	314,600.00
Interfund Transfers In	8910-8929									
All Other Financing Sources	8930-8979									
TOTAL RECEIPTS			174,296.00	174,296.00	307,424.00	1,291,434.50	307,424.00	307,424.00	307,424.00	1,094,203.00
C. DISBURSEMENTS										
Certificated Salaries	1000-1999		28,671.50	28,671.50	28,671.50	28,671.50	28,671.50	28,671.50	28,671.50	28,671.50
Classified Salaries	2000-2999		60,049.82	60,049.82	60,049.82	60,049.82	60,049.82	60,049.82	60,049.82	60,049.82
Employee Benefits	3000-3999		31,576.25	31,576.25	31,576.25	31,576.25	31,576.25	31,576.25	31,576.25	31,576.25
Books and Supplies	4000-4999		5,000.00	5,000.00	5,000.00	15,000.00	15,000.00	19,012.00	19,012.00	19,012.00
Services	5000-5999		5,000.00	35,000.00	205,000.00	25,000.00	470,000.00	420,000.00	420,000.00	420,000.00
Capital Outlay	6000-6599									
Other Outgo	7000-7499					149,231.89	149,231.89	149,231.89	149,231.89	149,231.89
Interfund Transfers Out	7600-7629									
All Other Financing Uses	7630-7699									
TOTAL DISBURSEMENTS			130,297.57	160,297.57	330,297.57	309,529.46	754,529.46	708,541.46	708,541.46	708,541.46
D. BALANCE SHEET ITEMS										
<u>Assets and Deferred Outflows</u>										
Cash Not In Treasury	9111-9199									
Accounts Receivable	9200-9299		367,533.00	275,650.00	279,325.00	279,325.00	176,416.00			
Due From Other Funds	9310									
Stores	9320									
Prepaid Expenditures	9330									
Other Current Assets	9340									
Deferred Outflows of Resources	9490									
SUBTOTAL		0.00	367,533.00	275,650.00	279,325.00	279,325.00	176,416.00	0.00	0.00	0.00
<u>Liabilities and Deferred Inflows</u>										
Accounts Payable	9500-9599		546,294.00							
Due To Other Funds	9610									
Current Loans	9640									
Unearned Revenues	9650									
Deferred Inflows of Resources	9690									
SUBTOTAL		0.00	546,294.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<u>Nonoperating</u>										
Suspense Clearing	9910									
TOTAL BALANCE SHEET ITEMS		0.00	(178,761.00)	275,650.00	279,325.00	279,325.00	176,416.00	0.00	0.00	0.00
E. NET INCREASE/DECREASE (B - C + D)			(134,762.57)	289,648.43	256,451.43	1,261,230.04	(270,689.46)	(401,117.46)	(401,117.46)	385,661.54
F. ENDING CASH (A + E)			728,970.55	1,018,618.98	1,275,070.41	2,536,300.45	2,265,610.99	1,864,493.53	1,463,376.07	1,849,037.61
G. ENDING CASH, PLUS CASH ACCRUALS AND ADJUSTMENTS										

	Object	March	April	May	June	Accruals	Adjustments	TOTAL	BUDGET
ACTUALS THROUGH THE MONTH OF (Enter Month Name):									
A. BEGINNING CASH		1,849,037.61	1,455,096.15	1,945,497.44	1,551,555.98				
B. RECEIPTS									
LCFF/Revenue Limit Sources									
Principal Apportionment	8010-8019							0.00	
Property Taxes	8020-8079							0.00	
Miscellaneous Funds	8080-8099							0.00	
Federal Revenue	8100-8299							779,603.00	779,603.00
Other State Revenue	8300-8599		509,945.75			509,945.75		2,039,783.00	2,039,783.00
Other Local Revenue	8600-8799	314,600.00	688,997.00	314,600.00	0.00	407,491.00		3,890,119.00	3,890,119.00
Interfund Transfers In	8910-8929							0.00	
All Other Financing Sources	8930-8979							0.00	
TOTAL RECEIPTS		314,600.00	1,198,942.75	314,600.00	0.00	917,436.75	0.00	6,709,505.00	6,709,505.00
C. DISBURSEMENTS									
Certificated Salaries	1000-1999	28,671.50	28,671.50	28,671.50	28,671.50			344,058.00	344,058.00
Classified Salaries	2000-2999	60,049.82	60,049.82	60,049.82	60,049.82			720,597.84	720,597.84
Employee Benefits	3000-3999	31,576.25	31,576.25	31,576.25	31,576.25			378,915.00	378,915.00
Books and Supplies	4000-4999	19,012.00	19,012.00	19,012.00	19,009.00			178,081.00	178,081.00
Services	5000-5999	420,000.00	420,000.00	420,000.00	28,198.00			3,288,198.00	3,288,198.00
Capital Outlay	6000-6599							0.00	0.00
Other Outgo	7000-7499	149,231.89	149,231.89	149,231.89	149,231.88			1,343,087.00	1,343,087.00
Interfund Transfers Out	7600-7629							0.00	0.00
All Other Financing Uses	7630-7699							0.00	0.00
TOTAL DISBURSEMENTS		708,541.46	708,541.46	708,541.46	316,736.45	0.00	0.00	6,252,936.84	6,252,936.83
D. BALANCE SHEET ITEMS									
<u>Assets and Deferred Outflows</u>									
Cash Not In Treasury	9111-9199							0.00	
Accounts Receivable	9200-9299							1,378,249.00	
Due From Other Funds	9310							0.00	
Stores	9320							0.00	
Prepaid Expenditures	9330							0.00	
Other Current Assets	9340							0.00	
Deferred Outflows of Resources	9490							0.00	
SUBTOTAL		0.00	0.00	0.00	0.00	0.00	0.00	1,378,249.00	
<u>Liabilities and Deferred Inflows</u>									
Accounts Payable	9500-9599							546,294.00	
Due To Other Funds	9610							0.00	
Current Loans	9640							0.00	
Unearned Revenues	9650							0.00	
Deferred Inflows of Resources	9690							0.00	
SUBTOTAL		0.00	0.00	0.00	0.00	0.00	0.00	546,294.00	
<u>Nonoperating</u>									
Suspense Clearing	9910							0.00	
TOTAL BALANCE SHEET ITEMS		0.00	0.00	0.00	0.00	0.00	0.00	831,955.00	
E. NET INCREASE/DECREASE (B - C + D)		(393,941.46)	490,401.29	(393,941.46)	(316,736.45)	917,436.75	0.00	1,288,523.16	456,568.17
F. ENDING CASH (A + E)		1,455,096.15	1,945,497.44	1,551,555.98	1,234,819.53				
G. ENDING CASH, PLUS CASH ACCRUALS AND ADJUSTMENTS								2,152,256.28	

Provide methodology and assumptions used to estimate revenues, expenditures, reserves and fund balance, and multiyear commitments (including cost-of-living adjustments). Deviations from the standards must be explained and may affect the interim certification.

Note: This form is the same as the school district criteria and standards review except for the average daily attendance, enrollment, ADA to enrollment, LCFF revenue, and ongoing and major maintenance account criteria, which are not applicable to JPAs, and the salaries and benefits and deficit spending criteria which measure unrestricted expenditures for districts but total expenditures for JPAs. The criteria and standards review should be completed only to the extent that individual components apply to each JPA, and with concurrence from the reviewing agency.

CRITERIA AND STANDARDS

1. CRITERION: Average Daily Attendance

This criterion is not checked for JPAs.

2. CRITERION: Enrollment

This criterion is not checked for JPAs.

3. CRITERION: ADA to Enrollment

This criterion is not checked for JPAs.

4. CRITERION: Local Control Funding Formula (LCFF) Revenue

This criterion is not checked for JPAs.

5. CRITERION: Salaries and Benefits

STANDARD: Projected ratio of total salaries and benefits to total general fund expenditures for any of the current fiscal year or two subsequent fiscal years has not changed from the historical average ratio from the three prior fiscal years by more than the greater of three percent or the JPA's required reserves percentage.

5A. Calculating the JPA's Historical Average Ratio of Salaries and Benefits to Total General Fund Expenditures

DATA ENTRY: Unaudited Actuals data that exist for the First Prior Year will be extracted; otherwise, enter data for the First Prior Year. Unaudited Actuals data for the second and third prior years are preloaded.

Fiscal Year	Unaudited Actuals		
	Salaries and Benefits (Form 01, Objects 1000-3999)	Total Expenditures (Form 01, Objects 1000-7499)	Ratio of Salaries and Benefits to Total Expenditures
Third Prior Year (2017-18)	1,219,149.47	5,959,504.08	20.5%
Second Prior Year (2018-19)	1,236,197.65	5,136,812.16	24.1%
First Prior Year (2019-20)	1,335,244.29	5,941,687.72	22.5%
	Historical Average Ratio:		22.4%

	Current Year (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)
JPA's Reserve Standard Percentage (Criterion 10B, Line 4):	5.0%	5.0%	5.0%
JPA's Salaries and Benefits Standard (historical average ratio, plus/minus the greater of 3% or the JPA's reserve standard percentage):	17.4% to 27.4%	17.4% to 27.4%	17.4% to 27.4%

5B. Calculating the JPA's Projected Ratio of Salaries and Benefits to Total General Fund Expenditures

DATA ENTRY: If Form MYPI exists, Projected Year Totals data for the two subsequent years will be extracted; if not, enter Projected Year Totals data. Projected Year Totals data for Current Year are extracted.

Fiscal Year	Projected Year Totals			Status
	Salaries and Benefits (Form 011, Objects 1000-3999) (Form MYPI, Lines B1-B3)	Total Expenditures (Form 011, Objects 1000-7499) (Form MYPI, Lines B1-B8, B10)	Ratio of Salaries and Benefits to Total Expenditures	
Current Year (2020-21)	1,447,157.25	9,564,144.25	15.1%	Not Met
1st Subsequent Year (2021-22)	1,443,570.83	6,252,936.83	23.1%	Met
2nd Subsequent Year (2022-23)	1,486,916.83	6,268,570.83	23.7%	Met

5C. Comparison of JPA Salaries and Benefits Ratio to the Standard

DATA ENTRY: Enter an explanation if the standard is not met.

- 1a. STANDARD NOT MET - Projected ratio of salary and benefit costs to total expenditures has changed by more than the standard in any of the current year or two subsequent fiscal years. Provide reasons why the change(s) exceed the standard and a description of the methods and assumptions used in projecting salaries and benefits.

Explanation:
(required if NOT met)

The current year includes increases to expenditures from carryover funds from FY19-20 the the JPA Board approved to be spent in FY20-21. Some of these expenditures are: \$420,253 for legal fees, \$36,692 for professional development, \$378,242 Non-Mental Health Allocation to LEAs, and \$1,806,933 Mental Health Allocation to LEAs.

6. CRITERION: Other Revenues and Expenditures

STANDARD: Projected operating revenues (including federal, other state and other local) or expenditures (including books and supplies, and services and other operating) for any of the current fiscal year or two subsequent fiscal years, have not changed by more than five percent since first interim projections.

Changes that exceed five percent in any major object category must be explained.

JPA's Other Revenues and Expenditures Standard Percentage Range:	-5.0% to +5.0%
JPA's Other Revenues and Expenditures Explanation Percentage Range:	-5.0% to +5.0%

6A. Calculating the JPA's Change by Major Object Category and Comparison to the Explanation Percentage Range

DATA ENTRY: First Interim data that exist will be extracted; otherwise, enter data into the first column. Second Interim data for Current Year are extracted. If Second Interim Form MYPI exists, data for the two subsequent years will be extracted; if not, enter data for the two subsequent years into the second column.

Explanations must be entered for each category if the percent change for any year exceeds the JPA's explanation percentage range.

Object Range / Fiscal Year	First Interim Projected Year Totals (Form 01CSI, Item 6A)	Second Interim Projected Year Totals (Fund 01) (Form MYPI)	Percent Change	Change Is Outside Explanation Range
Federal Revenue (Fund 01, Objects 8100-8299) (Form MYPI, Line A2)				
Current Year (2020-21)	779,603.00	779,603.00	0.0%	No
1st Subsequent Year (2021-22)	779,603.00	779,603.00	0.0%	No
2nd Subsequent Year (2022-23)	779,603.00	779,603.00	0.0%	No

Explanation
(required if Yes)

Other State Revenue (Fund 01, Objects 8300-8599) (Form MYPI, Line A3)

Current Year (2020-21)	2,021,191.00	2,021,191.00	0.0%	No
1st Subsequent Year (2021-22)	2,021,191.00	2,039,783.00	0.9%	No
2nd Subsequent Year (2022-23)	2,021,191.00	2,077,274.00	2.8%	No

Explanation
(required if Yes)

Other Local Revenue (Fund 01, Objects 8600-8799) (Form MYPI, Line A4)

Current Year (2020-21)	3,479,355.00	3,853,328.88	10.7%	Yes
1st Subsequent Year (2021-22)	3,087,469.00	3,890,119.00	26.0%	Yes
2nd Subsequent Year (2022-23)	3,050,678.00	3,853,328.00	26.3%	Yes

Explanation
(required if Yes)

Low Incidence Funding was estimated to be lower at First Interim than was certified by the CDE at P-1.

Books and Supplies (Fund 01, Objects 4000-4999) (Form MYPI, Line B4)

Current Year (2020-21)	174,589.00	174,589.00	0.0%	No
1st Subsequent Year (2021-22)	178,081.00	178,081.00	0.0%	No
2nd Subsequent Year (2022-23)	181,642.00	181,642.00	0.0%	No

Explanation
(required if Yes)

Services and Other Operating Expenditures (Fund 01, Objects 5000-5999) (Form MYPI, Line B5)

Current Year (2020-21)	3,681,560.58	3,681,561.00	0.0%	No
1st Subsequent Year (2021-22)	3,288,198.00	3,288,198.00	0.0%	No
2nd Subsequent Year (2022-23)	3,256,925.00	3,256,925.00	0.0%	No

Explanation
(required if Yes)

6B. Calculating the JPA's Change in Total Operating Revenues and Expenditures

DATA ENTRY: All data are extracted or calculated.

Object Range / Fiscal Year	First Interim Projected Year Totals	Second Interim Projected Year Totals	Percent Change	Explanation Range
Total Federal, Other State, and Other Local Revenues (Section 6A)				
Current Year (2020-21)	6,280,149.00	6,654,122.88	6.0%	Not Met
1st Subsequent Year (2021-22)	5,888,263.00	6,709,505.00	13.9%	Not Met
2nd Subsequent Year (2022-23)	5,851,472.00	6,710,205.00	14.7%	Not Met
Total Books and Supplies, and Services and Other Operating Expenditures (Section 6A)				
Current Year (2020-21)	3,856,149.58	3,856,150.00	0.0%	Met
1st Subsequent Year (2021-22)	3,466,279.00	3,466,279.00	0.0%	Met
2nd Subsequent Year (2022-23)	3,438,567.00	3,438,567.00	0.0%	Met

6C. Comparison of JPA Total Operating Revenues and Expenditures to the Standard Percentage Range

DATA ENTRY: Explanations are linked from Section 6A if the status in Section 6B is not met; no entry is allowed below.

- 1a. STANDARD NOT MET - Projected total operating revenues have changed since first interim projections by more than the standard in one or more of the current or two subsequent fiscal years. Reasons for the projected change, descriptions of the methods and assumptions used in the projections, and what changes, if any, will be made to bring the projected operating revenues within the standard must be entered in Section 6A above and will also display in the explanation box below.

Explanation:

Federal Revenue
(linked from 6A
if NOT met)

Explanation:

Other State Revenue
(linked from 6A
if NOT met)

Explanation:

Other Local Revenue
(linked from 6A
if NOT met)

Low Incidence Funding was estimated to be lower at First Interim than was certified by the CDE at P-1.

- 1b. STANDARD MET - Projected total operating expenditures have not changed since first interim projections by more than the standard for the current and two subsequent fiscal years.

Explanation:

Books and Supplies
(linked from 6A
if NOT met)

Explanation:

Services and Other Exps
(linked from 6A
if NOT met)

7. CRITERION: Facilities Maintenance

STANDARD: Identify changes that have occurred since first interim projections in the projected contributions for facilities maintenance funding as required pursuant to Education Code Section 17070.75, or in how the JPA is providing adequately to preserve the functionality of its facilities for their normal life in accordance with Education Code sections 52060(d)(1) and 17002(d)(1).

Determining the JPA's Compliance with the Contribution Requirement for EC Section 17070.75 - Ongoing and Major Maintenance/Restricted Maintenance Account (OMMA/RMA)

This criterion is not checked for JPAs.

8. CRITERION: Deficit Spending

STANDARD: Deficit spending (total expenditures and other financing uses is greater than total revenues and other financing sources) as a percentage of total expenditures and other financing uses, has not exceeded one-third of the JPA's available reserves¹ as a percentage of total expenditures and other financing uses² in any of the current fiscal year or two subsequent fiscal years.

¹Available reserves are the amounts in the Stabilization Arrangements, Reserve for Economic Uncertainties, and Unassigned/Unappropriated accounts in the General Fund and the Special Reserve Fund for Other Than Capital Outlay Projects. Available reserves will be reduced by any negative ending balances in restricted resources in the General Fund.

²A JPA that is the Administrative Unit of a Special Education Local Plan Area (SELPA) may exclude from its expenditures the distribution of funds to its participating members.

8A. Calculating the JPA's Deficit Spending Standard Percentage Levels

DATA ENTRY: All data are extracted or calculated.

	Current Year (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)
JPA's Available Reserve Percentage (Criterion 10C, Line 9)	1.9%	24.8%	31.8%
JPA's Deficit Spending Standard Percentage Levels (one-third of available reserve percentage):	0.6%	8.3%	10.6%

8B. Calculating the JPA's Deficit Spending Percentages

DATA ENTRY: Current Year data are extracted. If Form MYPI exists, data for the two subsequent years will be extracted; if not, enter data for the two subsequent years into the first and second columns.

Fiscal Year	Projected Year Totals			Status
	Net Change in Fund Balance (Form 011, Section E) (Form MYPI, Line C)	Total Expenditures and Other Financing Uses (Form 011, Objects 1000-7999) (Form MYPI, Line B11)	Deficit Spending Level (If Net Change in Fund Balance is negative, else N/A)	
Current Year (2020-21)	(2,910,021.37)	9,564,144.25	30.4%	Not Met
1st Subsequent Year (2021-22)	456,568.17	6,252,936.83	N/A	Met
2nd Subsequent Year (2022-23)	441,634.17	6,268,570.83	N/A	Met

8C. Comparison of JPA Deficit Spending to the Standard

DATA ENTRY: Enter an explanation if the standard is not met.

- 1a. **STANDARD NOT MET** - Deficit spending has exceeded the standard percentage level in any of the current year or two subsequent fiscal years. Provide reasons for the deficit spending, a description of the methods and assumptions used in balancing both the unrestricted and restricted budgets, and what changes will be made to ensure that the budget deficits are eliminated or are balanced within the standard.

Explanation:
(required if NOT met)

The current year includes an ending fund balance from FY 19-20 that the JPA Board has directed SELPA to spend in 20-21 by setting up accounts for Legal Fees and staff development as well as distributing the rest of the funding back to the districts. SELPA will have an ending fund balance again at the end of FY 20-21.

9. CRITERION: Fund and Cash Balances

A. FUND BALANCE STANDARD: Projected general fund balance will be positive at the end of the current fiscal year and two subsequent fiscal years.

9A-1. Determining if the JPA's General Fund Ending Balance is Positive

DATA ENTRY: Current Year data are extracted. If Form MYPI exists, data for the two subsequent years will be extracted; if not, enter data for the two subsequent years.

Ending Fund Balance General Fund Projected Year Totals		
Fiscal Year	(Form 01I, Line F2) (Form MYPI, Line D2)	Status
Current Year (2020-21)	1,096,218.41	Met
1st Subsequent Year (2021-22)	1,552,786.58	Met
2nd Subsequent Year (2022-23)	1,994,420.75	Met

9A-2. Comparison of the JPA's Ending Fund Balance to the Standard

DATA ENTRY: Enter an explanation if the standard is not met.

1a. STANDARD MET - Projected general fund ending balance is positive for the current fiscal year and two subsequent fiscal years.

Explanation:
(required if NOT met)

B. CASH BALANCE STANDARD: Projected general fund cash balance will be positive at the end of the current fiscal year.

9B-1. Determining if the JPA's Ending Cash Balance is Positive

DATA ENTRY: If Form CASH exists, data will be extracted; if not, data must be entered below.

Ending Cash Balance General Fund (Form CASH, Line F, June Column)			Status
Fiscal Year			
Current Year (2020-21)	863,733.12		Met

9B-2. Comparison of the JPA's Ending Cash Balance to the Standard

DATA ENTRY: Enter an explanation if the standard is not met.

1a. STANDARD MET - Projected general fund cash balance will be positive at the end of the current fiscal year.

Explanation:
(required if NOT met)

10. CRITERION: Reserves

STANDARD: Available reserves¹ for any of the current fiscal year or two subsequent fiscal years are not less than the following percentages or amounts² as applied to total expenditures and other financing uses³:

Percentage Level	JPA ADA		
5% or \$71,000 (greater of)	0	to	300
4% or \$71,000 (greater of)	301	to	1,000
3%	1,001	to	30,000
2%	30,001	to	400,000
1%	400,001	and	over

¹ Available reserves are the amounts in the Stabilization Arrangements, Reserve for Economic Uncertainties, and Unassigned/Unappropriated accounts in the General Fund and the Special Reserve Fund for Other Than Capital Outlay Projects. Available reserves will be reduced by any negative ending balances in restricted resources in the General Fund.

² Dollar amounts to be adjusted annually by the prior year statutory cost-of-living adjustment (Education Code Section 42238) and then rounded to the nearest thousand.

³ A JPA that is the Administrative Unit (AU) of a Special Education Local Plan Area (SELPA) may exclude from its expenditures the distribution of funds to its participating members.

	Current Year (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)
JPA ADA (Form MYPI, Line F1, if available; else defaults to zero and may be overwritten)	0	0	0
JPA's Reserve Standard Percentage Level:	5%	5%	5%

10A. Calculating the JPA's Special Education Pass-through Exclusions (only for JPAs that serve as the AU of a SELPA)

Special education pass-through exclusions are not applicable for JPAs.

10B. Calculating the JPA's Reserve Standard

DATA ENTRY: All data are extracted or calculated.

	Current Year Projected Year Totals (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)
1. Total Expenditures and Other Financing Uses (Criterion 8, Item 8B)	9,564,144.25	6,252,936.83	6,268,570.83
2. Plus: Special Education Pass-through (Not applicable for JPAs)	N/A	N/A	N/A
3. Net Expenditures and Other Financing Uses (Line B1 plus Line B2)	9,564,144.25	6,252,936.83	6,268,570.83
4. Reserve Standard Percentage Level	5%	5%	5%
5. Reserve Standard - by Percent (Line B3 times Line B4)	478,207.21	312,646.84	313,428.54
6. Reserve Standard - by Amount (\$71,000 for JPAs with less than 1,001 ADA, else 0)	71,000.00	71,000.00	71,000.00
7. JPA's Reserve Standard (Greater of Line B5 or Line B6)	478,207.21	312,646.84	313,428.54

10C. Calculating the JPA's Available Reserve Amount

DATA ENTRY: All data are extracted from fund data and Form MYPI. If Form MYPI does not exist, enter data for the two subsequent years.

Reserve Amounts	Current Year Projected Year Totals (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)
1. General Fund - Stabilization Arrangements (Fund 01, Object 9750) (Form MYPI, Line E1a)	0.00	0.00	0.00
2. General Fund - Reserve for Economic Uncertainties (Fund 01, Object 9789) (Form MYPI, Line E1b)	0.00	0.00	0.00
3. General Fund - Unassigned/Unappropriated Amount (Fund 01, Object 9790) (Form MYPI, Line E1c)	177,568.05	1,552,786.58	1,994,420.75
4. General Fund - Negative Ending Balances in Restricted Resources (Fund 01, Object 979Z, if negative, for each of resources 2000-9999) (Form MYPI, Line E1d)		0.00	0.00
5. Special Reserve Fund - Stabilization Arrangements (Fund 17, Object 9750) (Form MYPI, Line E2a)	0.00	0.00	0.00
6. Special Reserve Fund - Reserve for Economic Uncertainties (Fund 17, Object 9789) (Form MYPI, Line E2b)	0.00	0.00	0.00
7. Special Reserve Fund - Unassigned/Unappropriated Amount (Fund 17, Object 9790) (Form MYPI, Line E2c)	0.00	0.00	0.00
8. JPA's Available Reserve Amount (Lines C1 thru C7)	177,568.05	1,552,786.58	1,994,420.75
9. JPA's Available Reserve Percentage (Information only) (Line 8 divided by Section 10B, Line 3)	1.86%	24.83%	31.82%
JPA's Reserve Standard (Section 10B, Line 7):	478,207.21	312,646.84	313,428.54
Status:	Not Met	Met	Met

10D. Comparison of JPA Reserve Amount to the Standard

DATA ENTRY: Enter an explanation if the standard is not met.

- 1a. STANDARD NOT MET - Available reserves are below the standard in one or more of the current year or two subsequent fiscal years. Provide reasons for reserves falling below the standard and what plans and actions are anticipated to increase reserves to, or above, the standard.

Explanation:
(required if NOT met)

The SAC form does not recognize revenue in Resource 6500 as being available for reserves in the current budget. Most of SELPA funding is 6500 and when included meets all requires reserve calculations. SELPA does hold the 5% reserve requirement.

SUPPLEMENTAL INFORMATION

DATA ENTRY: Click the appropriate Yes or No button for items S1 through S4. Enter an explanation for each Yes answer.

S1. Contingent Liabilities

- 1a. Does your JPA have any known or contingent liabilities (e.g., financial or program audits, litigation, state compliance reviews) that have occurred since first interim projections that may impact the budget?

No

- 1b. If Yes, identify the liabilities and how they may impact the budget:

S2. Use of One-time Revenues for Ongoing Expenditures

- 1a. Does your JPA have ongoing general fund expenditures funded with one-time revenues that have changed since first interim projections by more than five percent?

No

- 1b. If Yes, identify the expenditures and explain how the one-time resources will be replaced to continue funding the ongoing expenditures in the following fiscal years:

S3. Temporary Interfund Borrowings

- 1a. Does your JPA have projected temporary borrowings between funds?
(Refer to Education Code Section 42603)

No

- 1b. If Yes, identify the interfund borrowings:

S4. Contingent Revenues

- 1a. Does your JPA have projected revenues for the current fiscal year or either of the two subsequent fiscal years contingent on reauthorization by the local government, special legislation, or other definitive act (e.g., parcel taxes, forest reserves)?

No

- 1b. If Yes, identify any of these revenues that are dedicated for ongoing expenses and explain how the revenues will be replaced or expenditures reduced:

S5. Contributions

Identify projected contributions from unrestricted resources in the general fund to restricted resources in the general fund for the current fiscal year and two subsequent fiscal years. Provide an explanation if contributions have changed by more than \$20,000 and more than five percent since first interim projections.

Identify projected transfers to or from the general fund to cover operating deficits in either the general fund or any other fund for the current fiscal year and two subsequent fiscal years. Provide an explanation if contributions have changed by more than \$20,000 and more than five percent since first interim projections.

Identify capital project cost overruns that have occurred since first interim projections that may impact the general fund budget.

JPA's Contributions and Transfers Standard:

-5.0% to +5.0%
or -\$20,000 to +\$20,000

S5A. Identification of the JPA's Projected Contributions, Transfers, and Capital Projects that may Impact the General Fund

DATA ENTRY: First Interim data that exist will be extracted; otherwise, enter data into the first column. For Transfers In and Transfers Out, if Form MYP exists, the data will be extracted into the Second Interim column for the Current Year, and 1st and 2nd Subsequent Years. If Form MYP does not exist, enter data in the Current Year, and 1st and 2nd Subsequent Years. Click on the appropriate button for Item 1d; all other data will be calculated.

Description / Fiscal Year	First Interim (Form 01CSI, Item S5A)	Second Interim Projected Year Totals	Percent Change	Amount of Change	Status
1a. Contributions, Unrestricted General Fund					
This item is not applicable for JPAs.					
1b. Transfers In, General Fund *					
Current Year (2020-21)	0.00	0.00	0.0%	0.00	Met
1st Subsequent Year (2021-22)	0.00	0.00	0.0%	0.00	Met
2nd Subsequent Year (2022-23)	0.00	0.00	0.0%	0.00	Met
1c. Transfers Out, General Fund *					
Current Year (2020-21)	0.00	0.00	0.0%	0.00	Met
1st Subsequent Year (2021-22)	0.00	0.00	0.0%	0.00	Met
2nd Subsequent Year (2022-23)	0.00	0.00	0.0%	0.00	Met

1d. Capital Project Cost Overruns

Have capital project cost overruns occurred since first interim projections that may impact the general fund operational budget?

No

* Include transfers used to cover operating deficits in either the general fund or any other fund.

S5B. Status of the JPA's Projected Contributions, Transfers, and Capital Projects

DATA ENTRY: Enter an explanation if Not Met for items 1b-1c or if Yes for Item 1d.

1a. This item is not applicable for JPAs.

1b. MET - Projected transfers in have not changed since first interim projections by more than the standard for the current year and two subsequent fiscal years.

Explanation:
(required if NOT met)

1c. MET - Projected transfers out have not changed since first interim projections by more than the standard for the current year and two subsequent fiscal years.

Explanation:
(required if NOT met)

--

1d. NO - There have been no capital project cost overruns occurring since first interim projections that may impact the general fund operational budget.

Project Information:
(required if YES)

S6B. Comparison of the JPA's Annual Payments to Prior Year Annual Payment

DATA ENTRY: Enter an explanation if Yes.

- 1a. No - Annual payments for long-term commitments have not increased in one or more of the current and two subsequent years.

--

S6C. Identification of Decreases to Funding Sources Used to Pay Long-term Commitments

DATA ENTRY: Click the appropriate Yes or No button in Item 1; if Yes, an explanation is required in Item 2.

1. Will funding sources used to pay long-term commitments decrease or expire prior to the end of the commitment period, or are they one-time sources?

n/a

2. Yes - Funding sources will decrease or expire prior to the end of the commitment period, or one-time funding sources are being used for long-term commitment annual payments. Provide an explanation for how those funds will be replaced to continue annual debt service commitments.

--

S7. Unfunded Liabilities

Identify any changes in estimates for unfunded liabilities since first interim projections, and indicate whether the changes are the result of a new actuarial valuation.

S7A. Identification of the JPA's Estimated Unfunded Liability for Postemployment Benefits Other Than Pensions (OPEB)

DATA ENTRY: Click the appropriate button(s) for items 1a-1c, as applicable. First Interim data that exist (Form 01CSI, Item S7A) will be extracted; otherwise, enter First Interim and Second Interim data in items 2-4.

1. a. Does your JPA provide postemployment benefits other than pensions (OPEB)? (If No, skip items 1b-4)

No

- b. If Yes to Item 1a, have there been changes since first interim in OPEB liabilities?

n/a

- c. If Yes to Item 1a, have there been changes since first interim in OPEB contributions?

n/a

2. OPEB Liabilities

- a. Total OPEB liability
b. OPEB plan(s) fiduciary net position (if applicable)
c. Total/Net OPEB liability (Line 2a minus Line 2b)

First Interim (Form 01CSI, Item S7A)	Second Interim
0.00	0.00

- d. Is total OPEB liability based on the JPA's estimate or an actuarial valuation?
e. If based on an actuarial valuation, indicate the measurement date of the OPEB valuation

3. OPEB Contributions

- a. OPEB actuarially determined contribution (ADC) if available, per actuarial valuation or Alternative Measurement Method
Current Year (2020-21)
1st Subsequent Year (2021-22)
2nd Subsequent Year (2022-23)

First Interim (Form 01CSI, Item S7A)	Second Interim

- b. OPEB amount contributed (for this purpose, include premiums paid to a self-insurance fund)
(Funds 01-70, objects 3701-3752)
Current Year (2020-21)
1st Subsequent Year (2021-22)
2nd Subsequent Year (2022-23)

0.00	0.00

- c. Cost of OPEB benefits (equivalent of "pay-as-you-go" amount)
Current Year (2020-21)
1st Subsequent Year (2021-22)
2nd Subsequent Year (2022-23)

- d. Number of retirees receiving OPEB benefits
Current Year (2020-21)
1st Subsequent Year (2021-22)
2nd Subsequent Year (2022-23)

4. Comments:

S7B. Identification of the JPA's Unfunded Liability for Self-insurance Programs

DATA ENTRY: Click the appropriate button(s) for Items 1a-1c, as applicable. First Interim data that exist (Form 01CSI, Item S7B) will be extracted; otherwise, enter First Interim and Second Interim data in items 2-4.

1. a. Does your JPA operate any self-insurance programs such as workers' compensation, employee health and welfare, or property and liability? (Do not include OPEB, which will be covered in Section S7A) (If No, skip items 1b-4)

No

- b. If Yes to Item 1a, have there been changes since first interim in self-insurance liabilities?

n/a

- c. If Yes to Item 1a, have there been changes since first interim in self-insurance contributions?

n/a

2. Self-Insurance Liabilities

- a. Accrued liability for self-insurance programs
b. Unfunded liability for self-insurance programs

First Interim (Form 01CSI, Item S7B)	Second Interim

3. Self-Insurance Contributions

- a. Required contribution (funding) for self-insurance programs
Current Year (2020-21)
1st Subsequent Year (2021-22)
2nd Subsequent Year (2022-23)

First Interim (Form 01CSI, Item S7B)	Second Interim

- b. Amount contributed (funded) for self-insurance programs
Current Year (2020-21)
1st Subsequent Year (2021-22)
2nd Subsequent Year (2022-23)

4. Comments:

--

S8. Status of Labor Agreements

Analyze the status of all employee labor agreements. Identify new labor agreements that have been ratified since first interim projections, as well as new commitments provided as part of previously ratified multiyear agreements; and include all contracts, including all administrator contracts (and including all compensation). For new agreements, indicate the date of the required board meeting. Compare the increase in new commitments to the projected increase in ongoing revenues and explain how these commitments will be funded in future fiscal years.

If salary and benefit negotiations are not finalized, upon settlement with certificated or classified staff:

The JPA must determine the cost of the settlement, including salaries, benefits, and any other agreements that change costs, and provide the county office of education (COE) with an analysis of the cost of the settlement and its impact on the operating budget.

The county superintendent shall review the analysis relative to the criteria and standards and may provide written comments to the president of the JPA governing board and superintendent.

S8A. Cost Analysis of JPA's Labor Agreements - Certificated (Non-management) Employees

DATA ENTRY: Click the appropriate Yes or No button for "Status of Certificated Labor Agreements as of the Previous Reporting Period." There are no extractions in this section.

Status of Certificated Labor Agreements as of the Previous Reporting Period

Were all certificated labor negotiations settled as of first interim projections?

n/a

If Yes or n/a, complete number of FTEs, then skip to section S8B.

If No, continue with section S8A.

Certificated (Non-management) Salary and Benefit Negotiations

	Prior Year (2nd Interim) (2019-20)	Current Year (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)
Number of certificated (non-management) full-time-equivalent (FTE) positions	0.9	0.9	0.9	0.9

1a. Have any salary and benefit negotiations been settled since first interim projections?

n/a

If Yes, and the corresponding public disclosure documents have been filed with the COE, complete question 2.

If Yes, and the corresponding public disclosure documents have not been filed with the COE, complete questions 2-4.

If No, complete questions 5 and 6.

1b. Are any salary and benefit negotiations still unsettled?

n/a

If Yes, complete questions 5 and 6.

Negotiations Settled Since First Interim Projections

2. Per Government Code Section 3547.5(a), date of public disclosure board meeting:

3. Period covered by the agreement:

Begin Date:

End Date:

4. Salary settlement:

Current Year
(2020-21)

1st Subsequent Year
(2021-22)

2nd Subsequent Year
(2022-23)

Is the cost of salary settlement included in the interim and multiyear projections (MYPs)?

One Year Agreement

Total cost of salary settlement

% change in salary schedule from prior year

or

Multiyear Agreement

Total cost of salary settlement

% change in salary schedule from prior year
(may enter text, such as "Reopener")

Identify the source of funding that will be used to support multiyear salary commitments:

Negotiations Not Settled

5. Cost of a one percent increase in salary and statutory benefits

6. Amount included for any tentative salary schedule increases

Current Year
(2020-21)

1st Subsequent Year
(2021-22)

2nd Subsequent Year
(2022-23)

Certificated (Non-management) Health and Welfare (H&W) Benefits

1. Are costs of H&W benefit changes included in the interim and MYPs?
2. Total cost of H&W benefits
3. Percent of H&W cost paid by employer
4. Percent projected change in H&W cost over prior year

Current Year (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)

Certificated (Non-management) Prior Year Settlements Negotiated Since First Interim Projections

Are any new costs negotiated since first interim projections for prior year settlements included in the interim?

If Yes, amount of new costs included in the interim and MYPs

If Yes, explain the nature of the new costs:

--

Certificated (Non-management) Step and Column Adjustments

1. Are step & column adjustments included in the interim and MYPs?
2. Cost of step & column adjustments
3. Percent change in step & column over prior year

Current Year (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)

Certificated (Non-management) Attrition (layoffs and retirements)

1. Are savings from attrition included in the interim and MYPs?
2. Are additional H&W benefits for those laid-off or retired employees included in the interim and MYPs?

Current Year (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)

Certificated (Non-management) - Other

List other significant contract changes that have occurred since first interim projections and the cost impact of each change (i.e., class size, hours of employment, leave of absence, bonuses, etc.):

S8B. Cost Analysis of JPA's Labor Agreements - Classified (Non-management) Employees

DATA ENTRY: Click the appropriate Yes or No button for "Status of Classified Labor Agreements as of the Previous Reporting Period." There are no extractions in this section.

Status of Classified Labor Agreements as of the Previous Reporting Period

Were all classified labor negotiations settled as of first interim projections?
If Yes or n/a, complete number of FTEs, then skip to section S8C.
If No, continue with section S8B.

n/a

Classified (Non-management) Salary and Benefit Negotiations

	Prior Year (2nd Interim) (2019-20)	Current Year (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)
Number of classified (non-management) FTE positions	8.0	8.8	8.0	8.0

1a. Have any salary and benefit negotiations been settled since first interim projections?

n/a

If Yes, and the corresponding public disclosure documents have been filed with the COE, complete question 2.
If Yes, and the corresponding public disclosure documents have not been filed with the COE, complete questions 2-4.
If No, complete questions 5 and 6.

1b. Are any salary and benefit negotiations still unsettled?

n/a

If Yes, complete questions 5 and 6.

Negotiations Settled Since First Interim Projections

2. Per Government Code Section 3547.5(a), date of public disclosure board meeting:

3. Period covered by the agreement:

Begin Date:

End Date:

4. Salary settlement:

Current Year
(2020-21)

1st Subsequent Year
(2021-22)

2nd Subsequent Year
(2022-23)

Is the cost of salary settlement included in the interim and multiyear
projections (MYPs)?

One Year Agreement

Total cost of salary settlement

% change in salary schedule from prior year
or

Multiyear Agreement

Total cost of salary settlement

% change in salary schedule from prior year
(may enter text, such as "Reopener")

Identify the source of funding that will be used to support multiyear salary commitments:

Negotiations Not Settled

5. Cost of a one percent increase in salary and statutory benefits

Current Year
(2020-21)

1st Subsequent Year
(2021-22)

2nd Subsequent Year
(2022-23)

6. Amount included for any tentative salary schedule increases

Classified (Non-management) Health and Welfare (H&W) Benefits

1. Are costs of H&W benefit changes included in the interim and MYPs?
2. Total cost of H&W benefits
3. Percent of H&W cost paid by employer
4. Percent projected change in H&W cost over prior year

Current Year (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)

Classified (Non-management) Prior Year Settlements Negotiated Since First Interim

Are any new costs negotiated since first interim for prior year settlements included in the interim?

If Yes, amount of new costs included in the interim and MYPs

If Yes, explain the nature of the new costs:

--

Classified (Non-management) Step and Column Adjustments

1. Are step & column adjustments included in the interim and MYPs?
2. Cost of step & column adjustments
3. Percent change in step & column over prior year

Current Year (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)

Classified (Non-management) Attrition (layoffs and retirements)

1. Are savings from attrition included in the interim and MYPs?
2. Are additional H&W benefits for those laid-off or retired employees included in the interim and MYPs?

Current Year (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)

Classified (Non-management) - Other

List other significant contract changes that have occurred since first interim and the cost impact of each (i.e., hours of employment, leave of absence, bonuses, etc.):

S8C. Cost Analysis of JPA's Labor Agreements - Management/Supervisor/Confidential Employees

DATA ENTRY: Click the appropriate Yes or No button for "Status of Management/Supervisor/Confidential Labor Agreements as of the Previous Reporting Period." There are no extractions in this section.

Status of Management/Supervisor/Confidential Labor Agreements as of the Previous Reporting Period

Were all managerial/confidential labor negotiations settled as of first interim projections?

n/a

If Yes or n/a, complete number of FTEs, then skip to S9.

If No, continue with section S8C.

Management/Supervisor/Confidential Salary and Benefit Negotiations

	Prior Year (2nd Interim) (2019-20)	Current Year (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)
Number of management, supervisor, and confidential FTE positions	2.0	2.0	2.0	2.0

1a. Have any salary and benefit negotiations been settled since first interim projections?

If Yes, complete question 2.

If No, complete questions 3 and 4.

n/a

1b. Are any salary and benefit negotiations still unsettled?

If Yes, complete questions 3 and 4.

n/a

Negotiations Settled Since First Interim Projections

2. Salary settlement:

Is the cost of salary settlement included in the interim and multiyear projections (MYPs)?

Total cost of salary settlement

Change in salary schedule from prior year
(may enter text, such as "Reopener")

Current Year (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)

Negotiations Not Settled

3. Cost of a one percent increase in salary and statutory benefits

4. Amount included for any tentative salary schedule increases

Current Year (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)

Management/Supervisor/Confidential Health and Welfare (H&W) Benefits

- Are costs of H&W benefit changes included in the interim and MYPs?
- Total cost of H&W benefits
- Percent of H&W cost paid by employer
- Percent projected change in H&W cost over prior year

Current Year (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)

Management/Supervisor/Confidential Step and Column Adjustments

- Are step & column adjustments included in the interim and MYPs?
- Cost of step & column adjustments
- Percent change in step & column over prior year

Current Year (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)

Management/Supervisor/Confidential Other Benefits (mileage, bonuses, etc.)

- Are costs of other benefits included in the interim and MYPs?
- Total cost of other benefits
- Percent change in cost of other benefits over prior year

Current Year (2020-21)	1st Subsequent Year (2021-22)	2nd Subsequent Year (2022-23)

S9. Status of Other Funds

Analyze the status of other funds that may have negative fund balances at the end of the current fiscal year. If any other fund has a projected negative fund balance, prepare an interim report and multiyear projection for that fund. Explain plans for how and when the negative fund balance will be addressed.

S9A. Identification of Other Funds with Negative Ending Fund Balances

DATA ENTRY: Click the appropriate button in Item 1. If Yes, enter data in Item 2 and provide the reports referenced in Item 1.

1. Are any funds other than the general fund projected to have a negative fund balance at the end of the current fiscal year?

No

If Yes, prepare and submit to the reviewing agency a report of revenues, expenditures, and changes in fund balance (e.g., an interim fund report) and a multiyear projection report for each fund.

2. If Yes, identify each fund, by name and number, that is projected to have a negative ending fund balance for the current fiscal year. Provide reasons for the negative balance(s) and explain the plan for how and when the problem(s) will be corrected.

ADDITIONAL FISCAL INDICATORS

The following fiscal indicators are designed to provide additional data for reviewing agencies. A "Yes" answer to any single indicator does not necessarily suggest a cause for concern, but may alert the reviewing agency to the need for additional review.

DATA ENTRY: Click the appropriate Yes or No button for items A2 through A9 except items A3 and A4, which are not applicable for JPAs; Item A1 is automatically completed based on data from Criterion 9.

A1. Do cash flow projections show that the JPA will end the current fiscal year with a negative cash balance in the general fund? (Data from Criterion 9B-1, Cash Balance, are used to determine Yes or No)

No

A2. Is the system of personnel position control independent from the payroll system?

No

A3. Is enrollment decreasing in both the prior and current fiscal years?

n/a

A4. Are new charter schools operating in JPA boundaries that impact the JPA's enrollment, either in the prior or current fiscal year?

n/a

A5. Has the JPA entered into a bargaining agreement where any of the current or subsequent fiscal years of the agreement would result in salary increases that are expected to exceed the projected state funded cost-of-living adjustment?

No

A6. Does the JPA provide uncapped (100% employer paid) health benefits for current or retired employees?

No

A7. Is the JPA's financial system independent of the county office system?

No

A8. Does the JPA have any reports that indicate fiscal distress pursuant to Education Code Section 42127.6(a)? (If Yes, provide copies to the county office of education.)

No

A9. Have there been personnel changes in the JPA director or financial official positions within the last 12 months?

No

When providing comments for additional fiscal indicators, please include the item number applicable to each comment.

Comments:
(optional)

End of Joint Powers Agency Second Interim Criteria and Standards Review

42-40378-0000000

Following is a chart of the various types of technical review checks and related requirements:

- | | | |
|------|---|--|
| F | - | Fatal (Data must be corrected; an explanation is not allowed) |
| W/WC | - | Warning/Warning with Calculation (If data are not correct, correct the data; if data are correct an explanation is required) |
| O | - | Informational (If data are not correct, correct the data; if data are correct an explanation is optional, but encouraged) |

EXPORT CHECKS

Checks Completed.

SACS2020ALL Financial Reporting Software - 2020.2.0
2/24/2021 7:47:48 AM

42-40378-0000000

Second Interim
2020-21 Original Budget
Technical Review Checks

Santa Barbara County SELPA JPA

Santa Barbara County

Following is a chart of the various types of technical review checks and related requirements:

- F - Fatal (Data must be corrected; an explanation is not allowed)
- W/WC - Warning/Warning with Calculation (If data are not correct, correct the data; if data are correct an explanation is required)
- O - Informational (If data are not correct, correct the data; if data are correct an explanation is optional, but encouraged)

IMPORT CHECKS

GENERAL LEDGER CHECKS

SUPPLEMENTAL CHECKS

EXPORT CHECKS

Checks Completed.

SACS2020ALL Financial Reporting Software - 2020.2.0
2/24/2021 7:47:14 AM

42-40378-0000000

Second Interim
2020-21 Projected Totals
Technical Review Checks

Santa Barbara County SELPA JPA

Santa Barbara County

Following is a chart of the various types of technical review checks and related requirements:

- F - Fatal (Data must be corrected; an explanation is not allowed)
- W/WC - Warning/Warning with Calculation (If data are not correct, correct the data; if data are correct an explanation is required)
- O - Informational (If data are not correct, correct the data; if data are correct an explanation is optional, but encouraged)

IMPORT CHECKS

GENERAL LEDGER CHECKS

SUPPLEMENTAL CHECKS

EXPORT CHECKS

Checks Completed.

SACS2020ALL Financial Reporting Software - 2020.2.0
2/24/2021 7:49:28 AM

42-40378-0000000

Second Interim
2020-21 Actuals to Date
Technical Review Checks

Santa Barbara County SELPA JPA

Santa Barbara County

Following is a chart of the various types of technical review checks and related requirements:

- F - Fatal (Data must be corrected; an explanation is not allowed)
- W/WC - Warning/Warning with Calculation (If data are not correct, correct the data; if data are correct an explanation is required)
- O - Informational (If data are not correct, correct the data; if data are correct an explanation is optional, but encouraged)

IMPORT CHECKS

CHK-FUNDxGOAL - (W) - The following combinations for FUND and GOAL are invalid. Data should be corrected or narrative must be provided explaining why the exception(s) should be considered appropriate. EXCEPTION

ACCOUNT	FUND	GOAL	VALUE
FD - RS - PY - GO - FN - OB			
01-0000-0-5750-2100-5800	01	5750	-3,800.00
01-6500-0-5750-2100-4300	01	5750	2,466.39
01-6500-0-5750-2100-5800	01	5750	-74.75

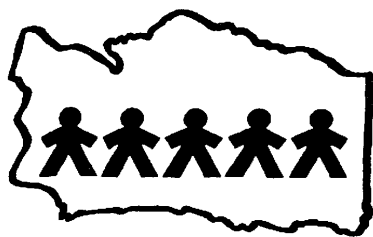
Explanation: This Goal is no longer available in SAC. Actuals and Budget have been moved to 5760, the replacement Goal.

GENERAL LEDGER CHECKS

SUPPLEMENTAL CHECKS

EXPORT CHECKS

Checks Completed.



Santa Barbara County
Special Education Local Plan Area
 A Joint Powers Agency

Date: March 1, 2021

To: SBCSELPA JPA Board

From: Ray Avila, SBCSELPA Executive Director

Re: Designation of the Official Representatives to the Santa Barbara SIPE Joint Powers Authority Board of Directors

BACKGROUND:

- SBCSELPA is a member of the Santa Barbara County Schools Self-Insurance Program for Employees (SIPE). To be a voting member of SIPE, SBCSELPA must have a resolution approved by our board (**SEE attached proposed Resolution, REF: VI-C.1**).
- The proposed SIPE Resolution designates the SBCSELPA CBO as the designated member to attend and represent our organization at future SIPE meetings. The SBCSELPA Executive Director will be designated at the “alternate” for future SIPE meeting attendance and representation.

FISCAL IMPACT: No fiscal impact.

RECOMMENDATIONS: The SBCSELPA JPA Board approve the proposed resolution for designation of official representatives to the Santa Barbara SIPE Joint Power Authority Board of Directors as presented.

RA:lm

**Santa Barbara County Special Education Local Plan Area
(SBCSELPA)**

RESOLUTION NO. 2020-2021

**RESOLUTION FOR THE DESIGNATION OF THE OFFICIAL REPRESENTATIVES
TO THE SANTA BARBARA COUNTY SCHOOLS SELF-INSURANCE PROGRAM
FOR EMPLOYEES (“SIPE”) JOINT POWERS AUTHORITY (JPA)
BOARD OF DIRECTORS**

WHEREAS the Santa Barbara County SELPA Joint Powers Agency Board is a member of and recognizes the Santa Barbara County Schools Self-Insured Program for Employees (SIPE) is the district’s workers’ compensation Joint Powers Authority (JPA); and

WHEREAS, through this Resolution the Board of Trustees is identifying the official representative and alternate representative to SIPE.

THEREFORE, BE IT RESOLVED, that the SBCSELPA JPA Board designates the SBCSELPA Chief Business Official, as the SBCSELPA’s official representative to SIPE and the SBCSELPA Executive Director as the official alternate for the purpose of representation to SIPE.

PASSED AND APPROVED THIS March 1, 2021 by the following votes:

Motion to adopt resolution was made by: _____ (NAME)

Seconded by: _____ (NAME)

Vote: Ayes: _____

Noes: _____

Absent: _____

Abstain: _____

Kim Hernandez

NAME OF AUTHORIZED REPRESENTATIVE MEMBER (print and sign)

I certify on this 1st day of March 2021 that the foregoing statement is true and correct.

Anne Hubbard

JPA Board Chairperson (print and sign)

Ray Avila

SBCSELPA Executive Director (print and sign)



Santa Barbara County Education Office

4400 Cathedral Oaks Rd, PO Box 6307, Santa Barbara, CA 93160-6307

Telephone: (805) 964-4711 • FAX: (805) 964-4712 • sbceo.org

Susan C. Salcido, Superintendent of Schools

January 14, 2021

SBAS-9398

TO: SELPA

FROM: Bill Ridgeway, Assistant Superintendent
Administrative Services

SUBJECT: **Interim Financial Report Analysis and Recommendations**

As required by Education Code Section 42131, our office has reviewed your district's interim report that was due to our office on Dec. 15.

We have notified the State Department of Education and the State Controller that your district has filed a positive certification with our office. Based on our analysis of the financial information submitted by the Superintendent, we concur with your district's certification. Our comments or technical corrections, if any, have been sent to your district's business office.

If you have any questions, please feel free to contact your district financial advisor or Denice Cora at ext. 5237.

ad

attachments

c Denice Cora, Administrator
Makenzie Johns, District Financial Advisor
Dr. Susan Salcido, County Superintendent of Schools





Santa Barbara County Education Office

4400 Cathedral Oaks Rd, PO Box 6307, Santa Barbara, CA 93160-6307



Telephone: (805) 964-4711 • FAX: (805) 964-4712 • sbceo.org

Susan C. Salcido, Superintendent of Schools

January 14, 2021

SBAS-9397

TO: Dr. Ray Avila, Director
Special Education Local Plan Area (SELPA)

FROM: Denice Cora, Administrator 
Makenzie Johns, District Financial Advisor 

SUBJECT: **First Interim Report Analysis and Recommendations**

In accordance with the provisions of Education Code Section 42131, our office has completed a review of the district's First Interim Report. Based on the multiyear projections and assumptions provided by the district, with data current as of Oct. 31, it appears that the district will be able to meet its financial obligations for the current and two subsequent fiscal years, while maintaining the required minimum level Reserve for Economic Uncertainties. **We therefore concur with the district's positive certification.**

This letter discusses the areas of comment noted by the Santa Barbara County Education Office in its review of the First Interim Report and any corresponding supplemental information provided by the district. The specific findings, comments, and requested actions are reflected in the following sections.

Financial Overview

The coronavirus pandemic continues to pose significant financial and operational challenges for districts. While the Enacted State Budget removed the ten percent cut included in the Adopted Budget, it also suspended the LCFF Cost of Living Adjustment (COLA) and increased principal apportionment cash deferrals. In addition, the budget included \$545 million in ongoing resources to equalize Assembly Bill 602 and \$100 million to increase funding for students with low-incidence disabilities. Further, the new Special Education base funding formula for the 2020-21 fiscal year calculates allocations to SELPAs based on the ADA reported for the SELPA for the current fiscal year, the most recent prior fiscal year, or the second most recent prior fiscal year (whichever is greatest). This increased, ongoing allocation to the new base funding formula results in a 2020-21 base rate of \$625 per ADA. The SELPA's administration has updated its planning factors in the First Interim Report to account for these changes in funding as well as to reflect the board approved allocations of the prior year fund balance.

Given the uncertain economic outlook resulting from the ongoing coronavirus pandemic, we ask that the SELPA remain adaptable and flexible in providing educational services while also focusing on budget management and fiscal solvency.

First Interim Report Analysis and Recommendations
 January 14, 2021
 SBAS-9397
 Page 2

General Fund Reserve

The SELPA is projecting an operating deficit in its general fund of approximately \$2,911,000. This decrease, when added to the beginning balance of approximately \$4,006,000, results in a projected ending balance of approximately \$1,095,000. The deficit is a result of the SELPA including the allocation of prior year carryover of Mental Health funding to its districts to be spent at the local level.

Cash

The Enacted State Budget includes significant deferrals of state apportionment payments, including the Special Education AB 602 apportionment in the months of February through June, 2021. Due to the projected magnitude of the deferrals of AB 602 funding, we continue to recommend that the SELPA review the impact of the deferrals on its cash flow and ensure that sufficient cash remains available to meet its financial obligations.

Conclusion

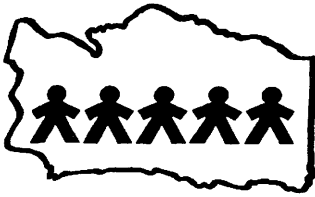
Thank you for providing documentation, particularly the board-approved multiyear projections, that supports the district's positive certification. The multiyear projections were helpful in our analysis of the First Interim Report and in verifying the district's fiscal condition.

We are aware that the information provided reflects the district's financial position and assumptions and that further adjustments will be made during the year as additional data becomes available. We hope that these comments will be helpful to the district administration and governing board as you plan for the remainder of this year and further develop your multiyear projections.

We wish to express our appreciation to the district staff for their cooperation during this review. If our office can be of further assistance, please call us.

ad

c Margaret Slater, Office Assistant
 Kim Hernandez, Accountant/Business Official
 Bill Ridgeway, Assistant Superintendent
 Dr. Susan Salcido, County Superintendent of Schools



Santa Barbara County
Special Education Local Plan Area
 A Joint Powers Agency

Date: March 1, 2021

To: SBCSELPA JPA Board

From: Ray Avila, SBCSELPA Executive Director

Re: Santa Maria-Bonita School District (SM-BSD) TLP/G.R.O.W. Assurance Letter

BACKGROUND:

- On December 7, 2020, the SBCSELPA Executive Director received email communication from Rusty Gordon, Special Education Director, Santa Maria-Bonita School District (SM-BSD), stating that the Elementary Regional “G.R.O.W.” (Therapeutic Learning Program) classroom would not have enough enrollment (one student) for the 2021-22 school year to remain open. The SBCSELPA Executive Director shared the Local Plan language with the SM-BSD Special Education Director that provided guidance on how to proceed with the closure of a regional program (SEE attachment, **REF: VII-B.1**).
- On December 18, 2020, the SBCSELPA Executive Director announced at the monthly Special Education Administrator Meeting (SEAM) of the possible closure of the SM-BSD G.R.O.W. classroom and solicited feedback from the various Special Education Directors (SEE attachment, **REF: VII-B.2**). Feedback to the SBCSELPA Executive Director and the SM-BSD Special Education Director confirmed there was no indication at that time that any students would be referred from neighboring LEA’s for this Elementary Regional program.
- On January 28, 2021, the SBCSELPA Executive Director requested from the SM-BSD Special Education Director a Letter of Assurance (SEE attachment, **REF: VII-B.3**) that outlines the process of communication to all stakeholders involved in the closure of this Elementary Regional Program.
- Per the Local Plan language all activities were implemented to fulfill the process of closure of this Elementary Regional Program.
- There will be one Elementary Regional G.R.O.W. classroom beginning the 2021-22 school year in the Lompoc Unified School District for access from neighboring North County LEA’s if a referral is made, along with one Elementary Non-Regional G.R.O.W. classroom in the Santa Ynez Valley Special Education Consortium (SYVSEC) that referrals can be made to with access granted on approval from the SYVSEC leadership.

FISCAL IMPACT: None.

RECOMMENDATION: The JPA Board approve the closure of the Elementary Regional G.R.O.W. (Therapeutic Learning Program) classroom in SM-BSD for the 2021-22 school year.

RA:lm

SANTA BARBARA COUNTY
SPECIAL EDUCATION LOCAL PLAN AREA

3000 BUSINESS AND NON-INSTRUCTIONAL OPERATIONS

3200 BUDGET PLANNING PROCESS

3208 Closure of Regional Programs or Program and Service Transfers

1. The SBCSELPA Executive Director shall consider closure of a regional class/program by January 15th of the year preceding the potential closure when the number of students drops below sixty percent of the recommended SELPA Plan caseload. Such consideration shall be reviewed by a committee designated by the SBCSELPA Executive Director to include the regional program operator, special education administrator, affected LEA special education administrators (from both LEAs of current students served and sending LEAs in the following school year), and at least one or more parent(s) of a child served in the program. The committee shall consider the following when making recommendations regarding potential closure of a regional class/program:
 - Historical class size data for past two years
 - Projected class size for next two future years
 - Age span of students
 - Purpose and intent of the class/program
 - Other viable options that provide FAPE in LRE and most appropriate setting
 - Parent input
 - Fiscal impact of closing the class/program versus keeping it open

Recommendations from the committee shall be discussed with the special education administrators and business official from districts in SBCSELPA in order to determine it is feasible to close the regional class/program and continue to meet student IEP needs.

The SBCSELPA Executive Director shall make final recommendations for closure of regional classes/programs to the JPA Board.

2. The SBCSELPA Executive Director shall consider an LEA's request for closure of a regional class/program when such request is put in writing and forwarded to the SBCSELPA Executive Director by September 1 of the year preceding the proposed regional class/program closure. Such consideration shall be discussed with the district and a committee comprised of the special education administrators and business official from districts in SBCSELPA in order to determine it is feasible to close the regional class/program and

SANTA BARBARA COUNTY
SPECIAL EDUCATION LOCAL PLAN AREA

3000 BUSINESS AND NON-INSTRUCTIONAL OPERATIONS

3200 BUDGET PLANNING PROCESS

3208 Closure of Regional Programs or Program and Service Transfers (*Continued*)

continue to meet student IEP needs. The LEA and SBCSELPA Executive Director shall also ensure that there has been involvement and representation of parents of all affected students and staff (e.g., special and non special education teachers, itinerant specialists, administrators, and classified) in the planning process. The SBCSELPA Executive Director shall make final recommendations for closure of regional classes/programs to the JPA Board.

3. The SBCSELPA Executive Director shall consider a LEA's request (sending or receiving) to transfer program(s) and service(s) (in whole or in part) when the sending or receiving agency has informed the other agency and the SELPA prior to the first day of the second fiscal year beginning after the date on which the transfer will take place unless both LEA's involved unanimously approve that the transfer take place on the first day of the first fiscal year following that date. The SBCSELPA Executive Director shall make final recommendations regarding program and service transfer requests (in whole or in part) to the JPA Board.
4. If an LEA requests (sending or receiving) to transfer program(s) and service(s) (in part or in whole) less than a year and a day prior to the proposed transfer, a written letter of request shall be made to the administrator of the current program operator and SBCSELPA Executive Director prior to a final recommendation going forth to the JPA Board. The SBCSELPA Executive Director shall receive confirmation in writing from the current program operator that they approve the requested date of transfer in part or in whole.
5. The LEA requesting program and service transfers certifies that the agency will comply with all applicable requirements of federal and state laws and regulations and special education local plan area policies, including compliance with the Individuals with Disabilities Education Act, Section 504 of Public Law, and the provisions of the California Education Code prior to the transfer. Specifically, the receiving LEA/District shall provide the Board a detailed program transfer plan that includes all of the following:
 - Evidence pupil needs within the SBCSELPA can be met
 - Evidence availability of a full continuum of services to affected pupils has been considered

SANTA BARBARA COUNTY
SPECIAL EDUCATION LOCAL PLAN AREA

3000 BUSINESS AND NON-INSTRUCTIONAL OPERATIONS

3200 BUDGET PLANNING PROCESS

3208 Closure of Regional Programs or Program and Service Transfers (*Continued*)

- Evidence continuation of current IEPs of affected pupils has been considered
- Evidence provision of services and least restrictive environment (LRE) for affected pupils has been considered
- Evidence of maintenance of all IEP support services has been considered
- Assurance statement that there will be compliance with all federal and state laws and regulations and SBCSELPA policies
- Evidence parents and staff were represented in the planning process for both the sending and receiving LEA
- Evidence of an agreed upon plan between sending and receiving LEAs for transfer of equipment
- Proposed plan for facilities
- Certification of the receiving LEA's governing board

6. When a reorganization (including the closure of a regional class/program or program and service transfer) of special education programs under the Local Plan results in the termination, reassignment, or transfer of an employee, certificated and classified employee rights shall be determined in accordance with applicable statutes. (See Ed. Code § 44903.7, 45120.2.)

An ad hoc committee review team may be designated by the SBCSELPA Executive Director on an as needed basis to advise her or him regarding potential regional class/program closures or program and service transfers.

This team may at the discretion and direction of the SBCSELPA Executive Director, review significant data regarding the regional class/program and/or make an on-site study prior to making a written recommendation to the SBCSELPA Executive Director as to its findings:

1. Projected class size based on the December pupil count of the past 3 years and current enrollment shall be considered in the case of a recommendation for a regional class/program closure or program and service transfers

SANTA BARBARA COUNTY
SPECIAL EDUCATION LOCAL PLAN AREA

3000 BUSINESS AND NON-INSTRUCTIONAL OPERATIONS

3200 BUDGET PLANNING PROCESS

3208 Closure of Regional Programs or Program and Service Transfers (*Continued*)

2. Pupil needs
3. Exceptional circumstances such as population, sparsity and low incidence disabilities shall also be considered in order to assure the availability of the full continuum of service to affected pupils
4. The functional continuation of the current individualized education programs of all affected pupils. The team must assure that the affected pupils' IEPs, to include appropriate support services, can be appropriately implemented in another setting in the case of a regional class/program closure or program and service transfer
5. The provision of services in the LRE from which the affected pupils can benefit
6. The assurance that there will be compliance with all federal and state laws and regulations and special education local plan area policies
7. The means through which parents and staff will be represented in the planning process
8. If it is a request to close a regional class/program or to transfer program(s) and service(s), consideration shall be given to whether another program operator is willing and able to assume responsibility for the program in order to assure a full continuum of service.
9. How certificated and classified personnel will be affected by the transfer.
10. Fiscal impact of regional class/program closure or program and service transfer.

SANTA BARBARA COUNTY
SPECIAL EDUCATION LOCAL PLAN AREA

3000 BUSINESS AND NON-INSTRUCTIONAL OPERATIONS

3200 BUDGET PLANNING PROCESS

3208 Closure of Regional Programs or Program and Service Transfers (*Continued*)

Closure of a regional class/program or program and service transfers shall occur at the beginning of the next fiscal year unless the program operator(s) unanimously agree that the closure take place at a different time.

The LEA requesting program and service transfers shall notify the SBCSELPA and JPA Board by January 15th of the year prior to the closure/transfer of a program or service if they plan to rescind the request.

California Education Code Part 30, Section 56207; 45120.2; 56822; 44903.7

DATE APPROVED: June 12, 1987
 DATE REVISED: November 8, 1991
 DATE REVISED: March 3, 1995
 DATE REVISED: December 9, 2002
 DATE REVISED: April 7, 2008
 DATE REVISED: November 2, 2009
 DATE REVISED: October 7, 2013
 DATE REVISED: September 8, 2014
 DATE REVISED: June 15, 2015
 DATE REVISED: January 9, 2017



Santa Barbara County
Special Education Local Plan Area
A Joint Powers Agency

SEAM Meeting

Friday, December 18, 2020

Via Zoom

Meeting Norms

Respect ◇ Active Listening ◇ Agree to Disagree ◇ Stay Focused

Respect Relationships ◇ Be Respectful of Time

Maintain a Sense of Humor

Possible Closure of Santa Maria-Bonita Grow Program for 2021-22

- ▶ Santa Maria-Bonita is anticipating very low enrollment in their regional GROW program for next year.
 - Is low enrollment a result of COVID?
 - Do surrounding districts anticipate referrals to the program?
 - Should we maintain the program with an anticipation of rising numbers?

SELPA Policy 3208 - Closure of Regional Programs included on the padlet.



Kenneth "Rusty" Gordon
Director of Special Education



SOUZA STUDENT SUPPORT CENTER
708 South Miller Street
Santa Maria, CA 93454-6230
(805) 928-1783, Ext. 8180
FAX (805) 928-6369

kgordon@smbd.net

February 9, 2021

Re: SM-BSD TLP/GROW Assurance Letter

Ray Avila, Ed.D
Executive Director
Santa Barbara County SELPA
via electronic mail

Dear Dr. Avila,

The purpose of this correspondence is to meet the assurance requirements for the closure request to the Santa Maria-Bonita School District Regional TLP-GROW for 4, 5, 6 grades due to low student numbers (currently 1 student) for the 2021-2022 school year.

The district will maintain compliance with all federal and state laws and regulations and SBC-SELPA policies to ensure the student receives and maintains all agreed upon and necessary IEP support services to access a high quality educational experience at SMBSD. The student affected will be appropriately served in another setting in a carefully planned out program of support and services in conjunction with parent and staff input.

The district has met with the affected employees individually to assure them rights and their continued employment opportunities within the district under our collective bargaining agreements as involuntary transfer due to closure of the program. (February 2 and 3, 2021).

We have met with the parent(s) of the student involved to begin discussion and planning to meet the students need(s) and services for the 2021-2022 school year.(February 5, 2021).

The district is prepared to meet the needs of this student and all students in the least restrictive environment next year.

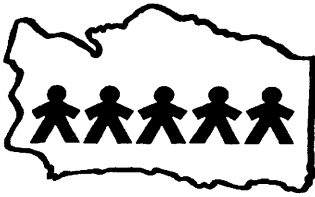
Please contact me if you have any questions or seek additional clarification.

Respectfully,

Rusty Gordon
Director, Special Education
Santa Maria-Bonita School District

Board of Education

VEDA ALVAREZ-FLORES • LINDA CORDERO • JOHN HOLLINSHEAD • RICKY LARA • RICARDO VALENCIA



Santa Barbara County
Special Education Local Plan Area
A Joint Powers Agency

Date: March 1, 2021

To: SBCSELPA JPA Board

From: Ray Avila, SBCSELPA Executive Director

Re: JPA Board Membership Term Expirations

BACKGROUND:

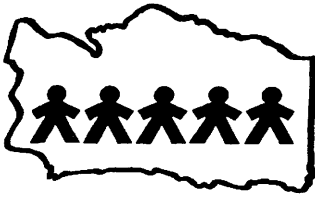
- The SBCSELPA Board is composed of eight (8) members from varying North and South, direct and non-direct service districts.
- As of June 30, 2021, three (3) of the current JPA Board members terms expire: Amy Alzina, Trevor McDonald, and Anne Hubbard.
- All three members are eligible to renew their membership terms for another two (2) years if they so desire and the Board votes to approve their re-election.

FISCAL IMPACT: None.

RECOMMENDATION: The current JPA Board discuss the renewal of membership of the three current board members whose terms expire on June 30, 2021.

RA:lm

	District Superintendents	Current SBCSELPA JPA Board Members	Term Expiration
North County Nondirect	Luke Onitveros, Santa Maria-Bonita	Luke Ontiveros, SM-B	6/30/2022
	Holly Edds, Orcutt Union		
	Doug Brown, Blochman Union		
	Emilio Handall, Guadalupe Union		
	Trevor McDonald, Lompoc Unified	Trevor McDonald, Lompoc Unified	6/30/2021
	Antonio Garcia, Santa Maria Joint Union High School		
South County Nondirect	Anne Hubbard, Hope	Anne Hubbard, Hope	6/30/2021
	Donna Lewis, Goleta Union		
	Hilda Maldonado, Santa Barbara Unified	Hilda Maldonado, SBUSD	6/30/2022
	Diana Rigby, Carpinteria Unified		
Combined North & South County Direct	Amy Alzina, Cold Spring	Amy Alzina, Cold Spring	6/30/2021
	Alfonso Gamino, Cuyama Joint Unified		
	Anthony Ranii, Montecito Union		
Santa Ynez Valley Special Education Consortium Nondirect	Pamela Able (Interim), Los Olivos		
	Maurene Donner, College		
	Scott Cory, Santa Ynez Valley Union High School		
	Randy Haggard, Buellton Union	Randy Haggard, Buellton Union	6/30/2022
	Lois Peterson, Vista Del Mar Union		
	Allan Pelletier, Ballard		
	Steve Seaford, Solvang		
9th - 12th High School	Scott Cory, Santa Ynez Valley Union High School		
	Antonio Garcia, Santa Maria Joint Union High School	Antonio Garcia, Santa Maria Joint Union High School	6/30/2022
Santa Barbara County Schools	Susan Salcido, Santa Barbara County Education Office	Susan Salcido, Santa Barbara County Education Office	No expiration



Santa Barbara County
Special Education Local Plan Area
 A Joint Powers Agency

Date: March 1, 2021

To: SBCSELPA JPA Board

From: Ray Avila, SBCSELPA Executive Director

Re: Procedural Handbook, Section 2, *Assessment - Occupational Therapy (OT) Assessment Referral Guidelines*, Revision

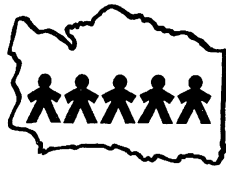
BACKGROUND:

- Lisa Foote, SBCSELPA AT/AAC Specialist and the Ad Hoc Committee reviewed, revised, and updated the “*Occupational Therapy (OT) Assessment Referral Guidelines*,” in Section 2 of the SBCSELPA Procedural Handbook, Section 2, Assessment. The necessary updates and changes to Section 2 are indicated on the attached copies (REF: VIII-D.1 to VIII-D.3).
- This item was originally presented at the Special Education Administrators meeting in January 2021. At which time, the Director’s provided feedback to the revised documents.
- Lisa and the Ad Hoc Committee further reviewed and discussed the input given by the SEAM group; additional revisions were made to the documents that were presented at the January meeting and the items were presented again to SEAM in February 2021.
- OT Forms and Procedures updated per January SEAM meeting feedback:
 1. OT Flow Chart: asterisk added to refer to OT Procedural Handbook in case of parent/guardian request for assessment.
 2. OT Referral Form is now changed to OT Pre-Referral Form.
 3. OT Procedural Handbook edits: added more explicit procedures to follow for parent/guardian request for assessment.
- The revisions and forms were previously presented to the SEAM group. District/LEA special education administrators support the proposed revisions.

FISCAL IMPACT: No impact.

RECOMMENDATION: The JPA Board approve the proposed revisions of the Procedural Handbook, Section 2, *Assessment - Occupational Therapy (OT) Assessment Referral Guidelines*, as presented.

RA:lm



Occupational Therapy Services Multi-Tiered System of Supports (MTSS) and Assessment Referral Guidelines

It is the goal of the SBCSELPA for these OT guidelines to facilitate LEAs and Occupational Therapists in providing appropriate education/school-based OT “related services” by using a Multi-Tiered System of Supports approach to guide the decision-making process to support students in accessing and benefitting from special education services.

I. The Individuals with Disabilities Education Act (IDEA) OT Regulations

The Individuals with Disabilities Education Act (IDEA) 2004 defines OT services as a “related service” which is defined as **“developmental, corrective, or other supportive services as may be required to assist a child with a disability to benefit from special education”** and/or as a “supplementary aid and service” which is defined as **“aids, services, and other supports that are provided in regular education classes or other education related settings to enable children with disabilities to be educated with non-disabled children to the maximum extent appropriate.”**

Under IDEA regulations, Title 34, Code of Federal Regulations, Section 300.34.(c)(6) defines “occupational therapy” as **“services provided by a qualified occupational therapist; and includes (a) improving, developing, or restoring functions impaired or lost through illness, injury, or depravations; (b) improving ability to perform tasks for independent functioning if functions are impaired or lost; and (c) preventing, through early intervention, initial further impairment or loss of function.”**

II. Roles and Functions of School Based Occupational Therapists

In school-based practice, OTs support a child’s ability to gain access to and make progress in their school curriculum. OTs are allied health professionals whose purpose in a public-school setting is to support a child’s engagement and participation in daily occupations, which include activities of daily living, education, prevocational work, play, rest, leisure and social participation. OTs have a unique role in the educational setting in working both on remediation (e.g., improving sensory and motor foundations of learning and behavior) and compensations (e.g., modifying the environment, tools, or task) to help a child succeed at school. (Guidelines for Occupational Therapy and Physical Therapy in California Public Schools, 2nd ed. CA Department of Education, 2012).

School-based Occupational Therapists provide support and function within the following processes:

1. Pre-referral services and MTSS as part of general education process
2. 504 referral and services as part of general education*
3. Special education referral and request for assessment
4. Special education assessment
5. IFSP infant/toddler and PK program planning
6. IEP planning
7. Transition planning and services
8. Intervention planning and implementation of IEP services
9. Documentation/Reporting

10. Liaison/Communication with outside agencies and entities
11. Staff Development/Training
12. OT program management
13. Supervision of therapy staff
14. Education/system development and facilities

(Guidelines for Occupational Therapy and Physical Therapy in California Public Schools, 2nd ed. CA Department of Education, 2012).

*consult contact site 504 coordinator or principal.

III. Types of Occupational Therapy Referrals

1. **Teacher/IEP Team Generated:** The teacher or specialist providing instruction has made modifications and provided interventions to address the student's motor and/or sensory and/or other classroom-based needs (generally, for a recommended period of 4-8 weeks) by following the SBCSELPA OT Pre-Referral Process Flow Chart and SBCSELPA Occupational Therapy Assessment Pre-Referral Form and determined that minimal progress was made by the student and therefore, the teacher, specialist, *or* OT recommends to IEP team an occupational therapy assessment.

All school staff referrals shall be in writing using the SBCSELPA OT Assessment Pre-Referral Form and include a brief explanation for the referral and document the OT recommended multi-tiered supports, strategies, interventions, modifications or resources in the general or special education settings that have been considered, trialed, or used, and provide data on results of the efficacy of the interventions and the student's progress.

If data indicates student **is** making progress, an OT assessment referral may not be appropriate. If data indicates that student **is not** making sufficient progress with additional supports an OT Assessment referral may be appropriate.

2. **Student Transfer:** A student transfers into a school district from another SELPA with a current IEP which includes school-based OT as a related service. An OT assessment may be a part of the 30-day interim placement review process. (The OT is notified ASAP of the OT services in the IEP by LEA.)
3. **Parent/Guardian Request:** A parent/guardian requests an OT assessment. A parent/guardian request does not automatically result in a formal OT assessment. The LEA must first document the parent's referral before determining how to proceed. When a verbal referral is made, staff of the school district, SELPA, or county office shall offer assistance to the individual in making a request in writing and shall assist the individual if the individual requests such assistance (5 CCR §3021(a)).

If LEA determines that the OT referral is not appropriate, it may deny the assessment request. Within 15 days of the request, a prior written notice must be sent by the LEA to parent detailing why an assessment is being denied.

In order for the LEA and IEP team, including parents/guardians to determine if a school-based OT Assessment referral or request is appropriate the following shall occur:

1. Within 15 days the LEA (case manager or administration) should contact the parent/guardian and provide them with a hard copy of the SBCSELPA OT Flow Chart, the SBCSELPA OT Assessment Pre-Referral Form, discuss with them the

request for assessment, and describe the OT MTSS and pre-referral guidelines for OT assessment requests. The IEP team makes decisions on need for assessment for related services such as OT based on all available assessments and data and it is an IEP team-based decision, including parent/guardian and OT, to discern if OT assessment is appropriate at that time.

2. After meeting and/or discussing with parent/guardian about the request for OT assessment, the following can occur:
 - a. IEP team, including parent agrees to OT MTSS interventions and to follow OT pre-referral process. Within 15 days of request LEA responds to parent/guardian with a Prior Written Notice the steps that will be taken during the 60-day OT MTSS timeline and no AP for OT assessment will be generated at that time. At the end of the 60-day OT MTSS timeline, further recommendations will be determined by the IEP team, including parent/guardian.
 - b. Parent does not agree with the OT MTSS interventions and pre-referral process. It is still an IEP team decision, including parent, whether an OT assessment is warranted at that time. Within 15 days of request, LEA responds to parent/guardian with a Prior Written Notice to either follow the 60-day OT MTSS and pre-referral process or to generate AP for OT Assessment. At the end of the 60-day OT MTSS timeline or 60-day OT assessment timeline, further recommendations will be determined by the IEP, including parent.
 - c. The LEA should inform the parent/guardian that the OT MTSS and pre-referral process may or may not result in a formal OT assessment once completed.
 - d. The LEA also must provide parents with a copy of their rights and procedural safeguards. (See CFR 300.301 and 300.303; 34 CFR 300.301(b) and (34 CFR 300.503(b); EC 56301(d)(2)(A) and EC 56043(a))).
4. **Included as part of Assessment Plan:** An OT assessment is included as a part of an initial assessment plan. Each public agency must ensure that the child is assessed in all areas related to the suspected disability, including, if appropriate ...motor abilities... (34 CFR 300.304©).
5. **Infant Services (Part C) Transitioning to Preschool (PK) Program:** Infant Preschool Transitions should follow the guidelines as listed in 1-4 above.

The Infant Program's (Part C provider) Individualized Family Service Plan (IFSP) Transition team reports development levels and student progress on IFSP goals based on current data and assessment reports.

If student is receiving OT services on an IFSP the IFSP OT should make the recommendation to the PK assessment team as to if student ~~would~~ continues to require OT services and for OT to be included on the PK Assessment Plan **or** that student has made sufficient progress with IFSP OT services and student would benefit instead from entering and transitioning into PK program without related OT services.

The PK IEP team will follow the SBCSELPA OT Flow Chart and utilize the SBCSELPA OT Assessment Pre-Referral Form once student enters a PK program if areas of concern were to arise after student is given adequate time to transition based on their individual needs.

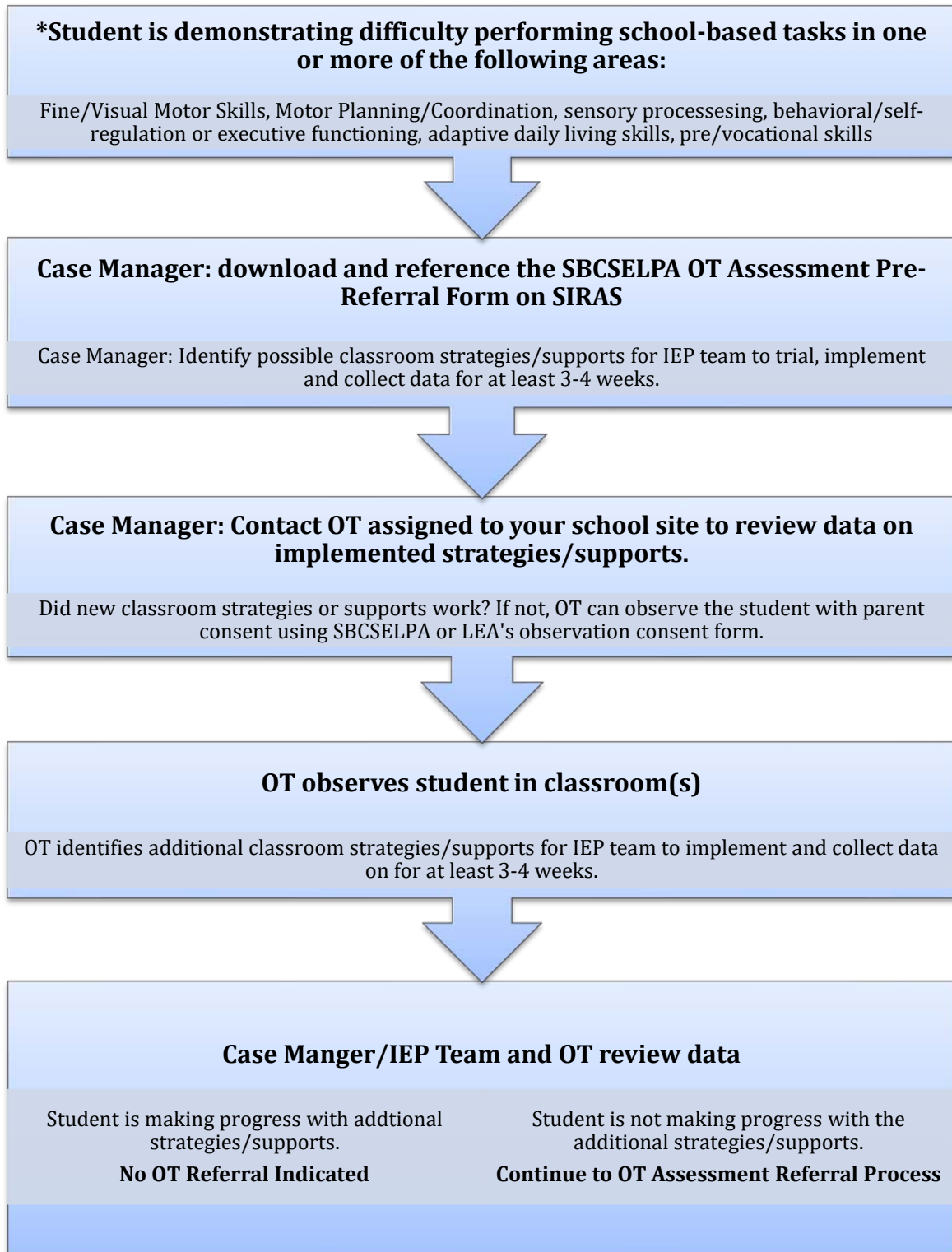
The IEP team makes decisions on eligibility based on all available assessments and data:

- a. The IEP Team may determine that OT services are required to assist the child with disabilities to benefit from special education. (34 CFR 300.34(a)). The IEP team may then develop **developmentally** appropriate goals and offer appropriate OT services.
- b. IEP team may determine that at this time OT services are not required to assist the student with a disability to benefit from special education (34 CFR 300.34)

When a referral is made a proposed assessment plan, **or Prior Written Notice describing OT MTSS and pre-referral process for OT assessment** shall be developed within 15 calendar days of referral for assessment, not counting calendar days between the pupil's regular school sessions or terms or calendar days of school vacation in excess of five school days, from the date of receipt of the referral, unless the parent or guardian agrees in writing to an extension, pursuant to subdivision (a) of Section 56321.

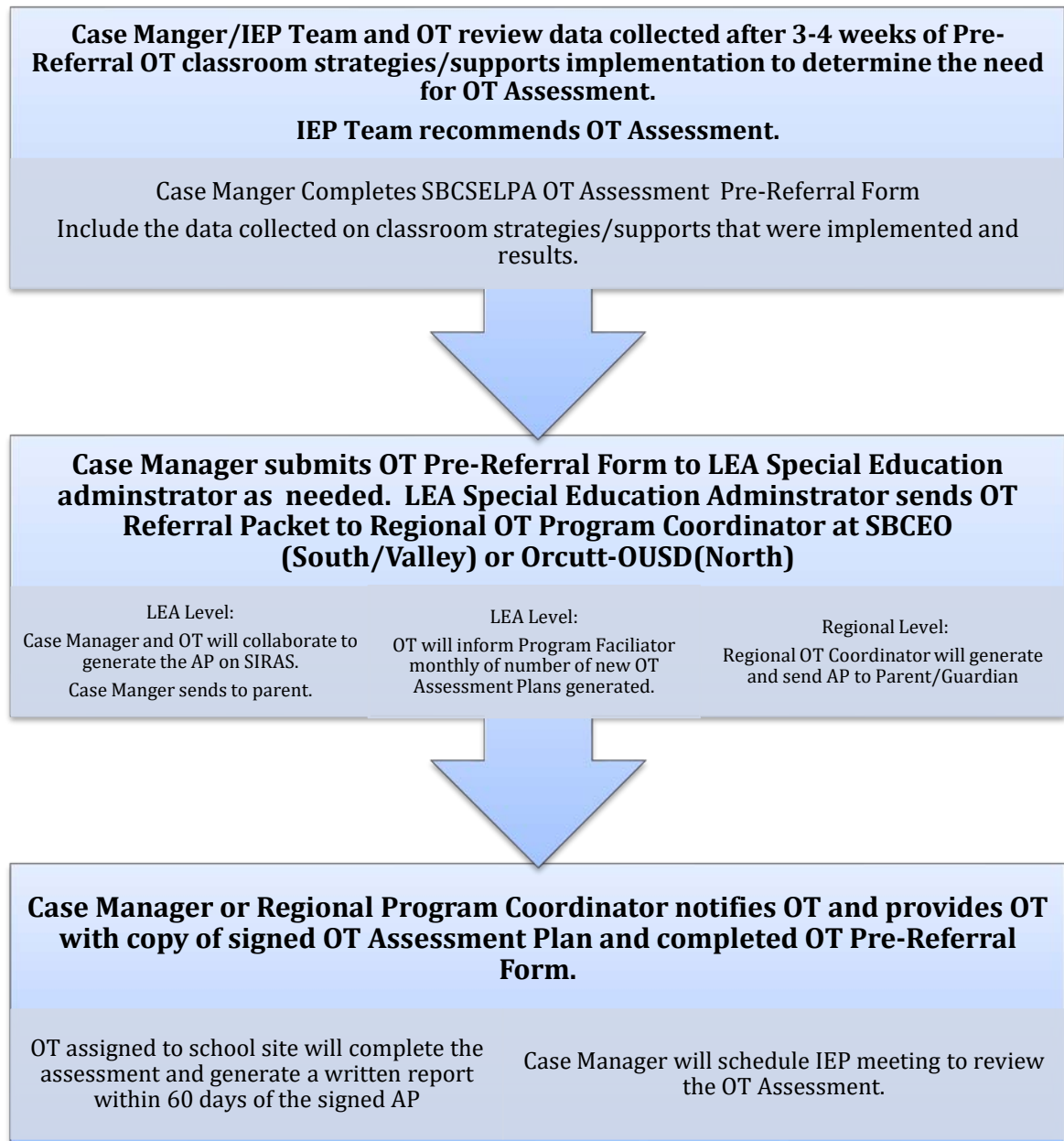
Please continue to next page.

IV. OT Assessment Pre-Referral Process Flow Chart



***For Parent/Guardian request for OT assessment, please refer to the *OT Services MTSS and Assessment Referral Guidelines* in the Santa Barbara County SELPA's Procedural Handbook, Section 2. All requests for OT Assessments are recommended to follow the MTSS 60-day pre-referral process for the OT to determine the necessity for assessment.**

V. Occupational Therapy (OT) Assessment Referral Process



VI. OT Assessment Referral Procedures and Documents

A. LEA Level:

For a New Referral the Following Procedures and Documents Shall Be Used:

1. The referring LEA Special Education Case Manager or designee shall complete the SBCSELPA OT Assessment Pre-Referral Form (SELPA56) (Available in SIRAS Added Forms SELPA Documents)

2. Case manager reviews ***Pre***-Referral Form with LEA OT assigned to school site and collaborates to generate the AP for OT Assessment. Case manager sends copy of signed AP when it is returned by parent/guardian and 60-day timeline begins.
3. Case Manager and OT will inform Special Education Administration of new OT Referrals for caseload/workload census.
4. OT completes file review to determine if the child has a California Children Services (CCS) diagnosis and, if so, then file a CCS referral.
5. If student has a CCS diagnosis and is currently receiving CCS MTU services have parent sign LEA's Parent Consent to Release of Information form to contact the local CCS MTU to request copy of the student's most recent assessment report and any medical information or contraindications for school-based services.
6. Some examples of CCS eligible diagnoses include, but are not limited to:

Cerebral Palsy	Chronic Musculo-skeletal Disease, Deformity or Injury
Neuromuscular Disease	Osteogenesis Imperfecta
Muscular Dystrophy	Amputation
Spina Bifida	Contractures resulting from burns
Traumatic Brain Injury	Polio

7. If the student has a disabling condition that may qualify for CCS services, use the forms for referral contained in the CCS/SELPA Interagency Agreement available through your district special education office or at www.sbcselfpa.org under publications.

NOTE: The referral to CCS cannot delay the educationally related OT referral. Medically necessary OT has no bearing on the LEA's obligation to meet the 15-day timeline to offer an assessment plan to the parent for an educationally related OT assessment.

NOTE: If student is client of CCS MTU, the permission to contact CCS MTU is optional on the part of the parent and it may not hold up the process. All timelines are still in effect. If parent denies permission for LEA to contact the CCS MTU or the Authorization to Release Information form is not returned by parent, the OT Assessment will not be affected.

8. LEA Case Manager and OT will collaborate to schedule a mutually agreed upon time with parent to schedule the IEP meeting to review OT Assessment Results ***within 60-day timeline***. At the IEP meeting, the Occupational Therapist will: provide the team members with a written assessment report, report the assessment results and make recommendations for needed modifications or related services based on the assessment results. The IEP Team will make the final determinations based on the OT's data and recommendations of whether the student qualifies for OT related services. The IEP Team will also specify who will provide the service as well as the frequency and duration of the service which are then written into the IEP.

B. OT Regional Program Level (SBCEO, Orcutt Union School District Pupil Services)

1. The referring LEA Special Education Administrator, Case Manager or other designee shall complete the SBCSELPA OT Assessment Referral Packet (SELPA57) (Available in SIRAS Added Forms SELPA Documents)

2. The OT referral packet should only be completed for students in districts that continue to use Regional Program OTs. The packet should be reviewed and signed by the referring LEA's Special Education Administrator or designee. The packet is sent to the OT Regional Program Service Operator's Special Education Administrator as follows:

Orcutt's Director of Pupil Services: Lompoc and North LEAs
SBCEO's Occupational Therapy Coordinator: Valley and South LEAs

**If the referral packet is not complete, Regional Program Service Operator will contact the referring LEA Special Education Administrator and request they submit missing documentation within 5 business days or sooner if timeline issues are a concern.

3. Referral Packet Includes:

- a. SELPA55: OT Referral Steps Checklist Form
- b. SELPA56: SBCSELPA OT Assessment *Pre*-Referral Form
- c. SUPP21A: Referral for *Special Education and Related Services* form:
 - The "General Education Intervention Attempts" section of on the *Receipt of Referral to Special Education (SIRAS IEP 17)* form should address the skill or skills for which the teacher has made modifications that have not been successful. These must be skills that are necessary for the student to benefit from the instructional program. For example: Student cannot hold a pencil and apply enough pressure to write a sentence.
 - If assessment is at parent request, be specific describing parent area of concern and what you have done in the classroom that addresses this concern. If teacher does not have a concern in this area state how child functions in the classroom in this parent area of concern.
- d. SELPA3: *Parent Consent for Release of Information* form

4. Special Education Administrator or designee completes file review to determine if the child has a California Children Services (CCS) diagnosis and, if so, then file a CCS referral.
5. If student has a CCS diagnosis and is already receiving CCS MTU services have parent sign Parent Consent to Release of Information form to contact the local CCS MTU to request copy of the student's most recent assessment report and any medical information or contraindications for school based services.
6. Some examples of CCS eligible diagnoses include, but are not limited to:

Cerebral Palsy	Chronic Musculoskeletal Disease, Deformity or Injury
Neuromuscular Disease	Osteogenesis Imperfecta
Muscular Dystrophy	Amputation
Spina Bifida	Contractures resulting from burns
Traumatic Brain Injury	Polio

7. If the student has a disabling condition that may qualify for CCS services, use the forms for referral contained in the CCS/SELPA Interagency Agreement available through your district special education office or at www.sbcselfpa.org under publications.

NOTE: The referral to CCS cannot delay the educationally related OT referral. Medically necessary OT has no bearing on the LEA's obligation to meet the 15-day

timeline to offer an assessment plan to the parent for an educationally-related OT assessment.

NOTE: If student is client of CCS MTU, the permission to contact CCS MTU is optional on the part of the parent and it may not hold up the process. All timelines are still in effect. If parent denies permission for LEA to contact the CCS MTU or the Parent Consent Release Information form is not returned by parent the OT Assessment will not be affected.

8. After reviewing the OT referral packet the LEA immediately sends the OT referral packet to appropriate OT Regional Program Coordinator.
9. Regional Service Operator will:
 - a. Within 15 days of the date of referral, which is not necessarily the date on which the Occupational Therapy Assessment Referral Packet (SELPA57) is received, send the parent, the assigned OT service provider, and the Special Education Administrator of the referring LEA a letter explaining the assessment process and timeline as well as the assessment plan documents to be signed. The LEA has the obligation to process paperwork and provide the referral to the Regional Service Operator in a timely fashion so the Regional Service Operator can send the assessment plan within 15 days of the date of referral. When calculating the 15-day time limit, do not count days between the student's regular school sessions or terms or days of school vacation in excess of five school days.
 - b. Assessment plan is to be returned to the OT Regional Program Coordinator. After signed assessment plan is received, the OT Regional Program Coordinator sends the Occupational Therapist and the referring district a letter stating the specific timeline for the assessment; keeping in mind the timeline to hold an IEP meeting within 60 days of the signed assessment plan in order to review assessment results. This letter will be sent out only after receiving the signed Assessment Plan from the parent.
10. The Referring LEA will:
 - c. Schedule the IEP meeting at a mutually agreed upon time with parent and assigned OT service provider. At the IEP meeting, the Occupational Therapist will: provide the team members with a written assessment report, report the assessment results and make recommendations for needed modifications or related services based on the assessment results. The IEP Team will make the final determinations based on the OT's data and recommendations of whether the student qualifies for OT related services. The IEP Team will also specify who will provide the service as well as the frequency and duration of the service which are then written into the IEP.

VII. Students Transferring Into SBCSELPA From Out of the SELPA

The following procedures shall be followed:

1. **LEA Level:**
 - a. Within 5 school days, the LEA case manager will forward the IEP of the transfer-in student who has occupational therapy services listed on previous district IEP to the LEA's occupational therapist assigned to the school site.
 - b. The IEP should also be entered into the SIRAS IEP website so that services may be initiated immediately.
 - c. The OT will use the 30-day transfer-in timeline to determine the appropriateness of OT services.

- d. If the OT decides that an assessment is necessary to determine the student's needs and/or appropriateness of OT, then an assessment plan must be sent home for parent/guardian/adult student consent prior to any type of formal assessment.

NOTE: The OT needs notification of meeting 10 days prior to the meeting to ensure that they will have an opportunity to attend, report the findings and give recommendations at the 30-day IEP meeting.

2. OT Regional Program Level:

- a. Within 5 school days, the LEA will forward the IEP of the transfer-in student who has occupational therapy services listed on previous district IEP to the SBCEO office for Valley and South County students and to Orcutt Pupil Services Office for Lompoc and North County students.
- b. The IEP will be forwarded to the regional program occupational therapist assigned to the school site.
- c. The IEP should also be entered into the SIRAS IEP website so that services may be initiated immediately.
- d. The OT will use the 30-day transfer-in timeline to determine the appropriateness of OT services.
- e. If the OT decides that an assessment is necessary to determine the student's needs and/or appropriateness of OT, then an assessment plan must be sent home for parent/guardian/adult student consent prior to any type of formal assessment.

NOTE: The OT needs notification of meeting 10 days prior to the meeting to ensure that they will have an opportunity to attend, report the findings and give recommendations at the 30-day IEP meeting.

WHAT FORMS SHOULD BE USED

The following forms should be used during the assessment phase, as appropriate:

NC 3 PWN-Assessment Plan

SELPA 3: Parent Consent for Release of Information (E & S)
This form is to be used to obtain parent permission to receive information from other agencies or individuals relevant to the evaluation and educational planning.

NC 2B Notice of Reassessment (E & S)

SELPA 4: Parental and Adult Student's Rights and Procedural Safeguards for Special Education (E & S)

SELPA 56: SBCSELPA Occupational Therapy Assessment ***Pre***-Referral Form

IEP 17 Receipt of Referral to Special Education (E & S)

SELPA 16: Physician's Information for Related Services

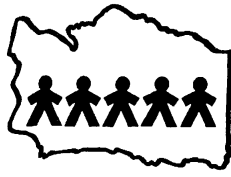
SELPA 55: OT Referral Steps Checklist

SELPA 8: California Modified Assessment Survey (E & S)

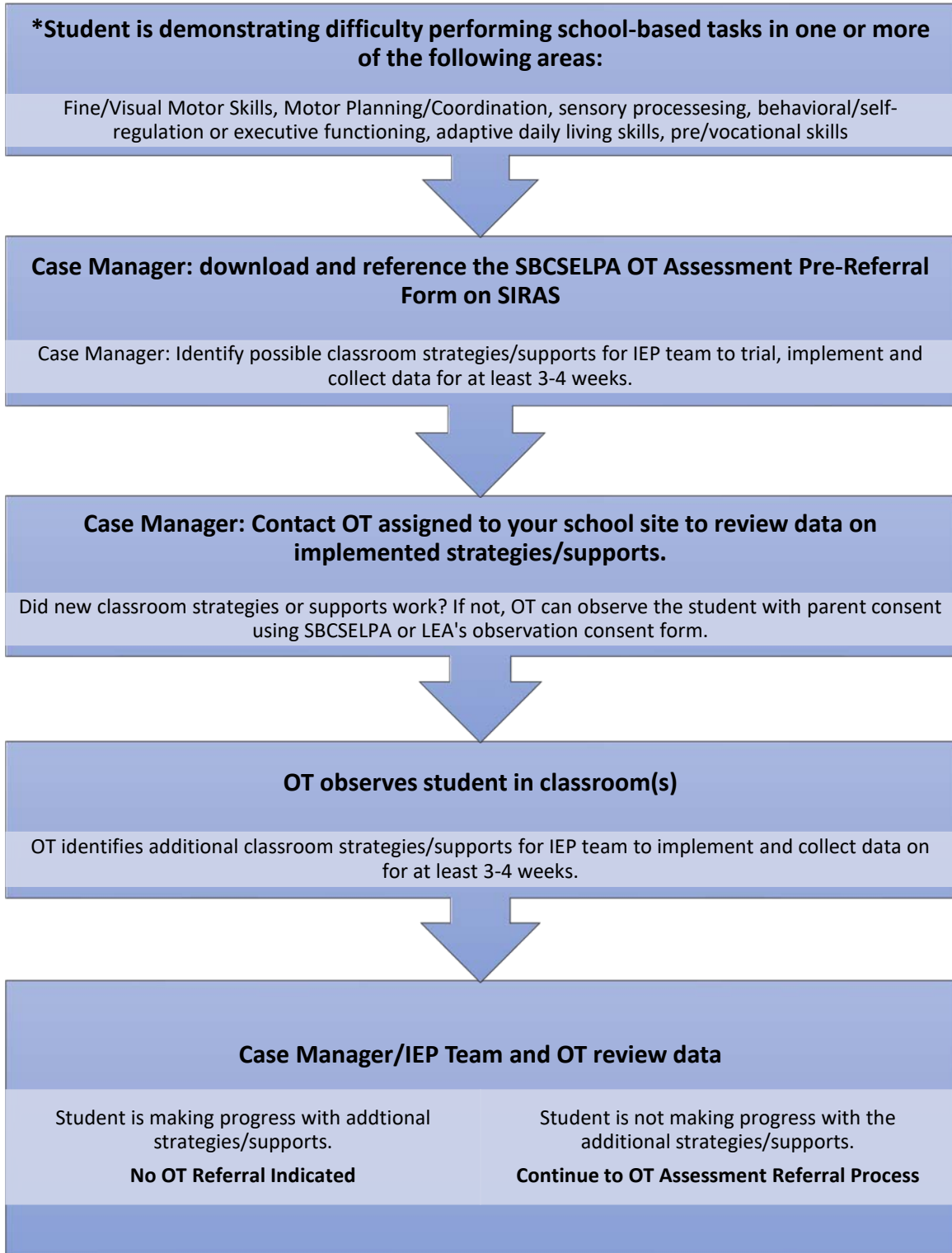
SELPA 44: Assistive Technology Consideration of Needs

<p>E = <i>ENGLISH</i> and S = <i>SPANISH</i></p>
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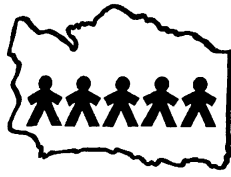
Appendix A references the forms highlighted throughout this handbook. SELPA and Supplemental IEP forms can be found on our county's on-line ***SIRAS Systems***, www.sirassystems.org.



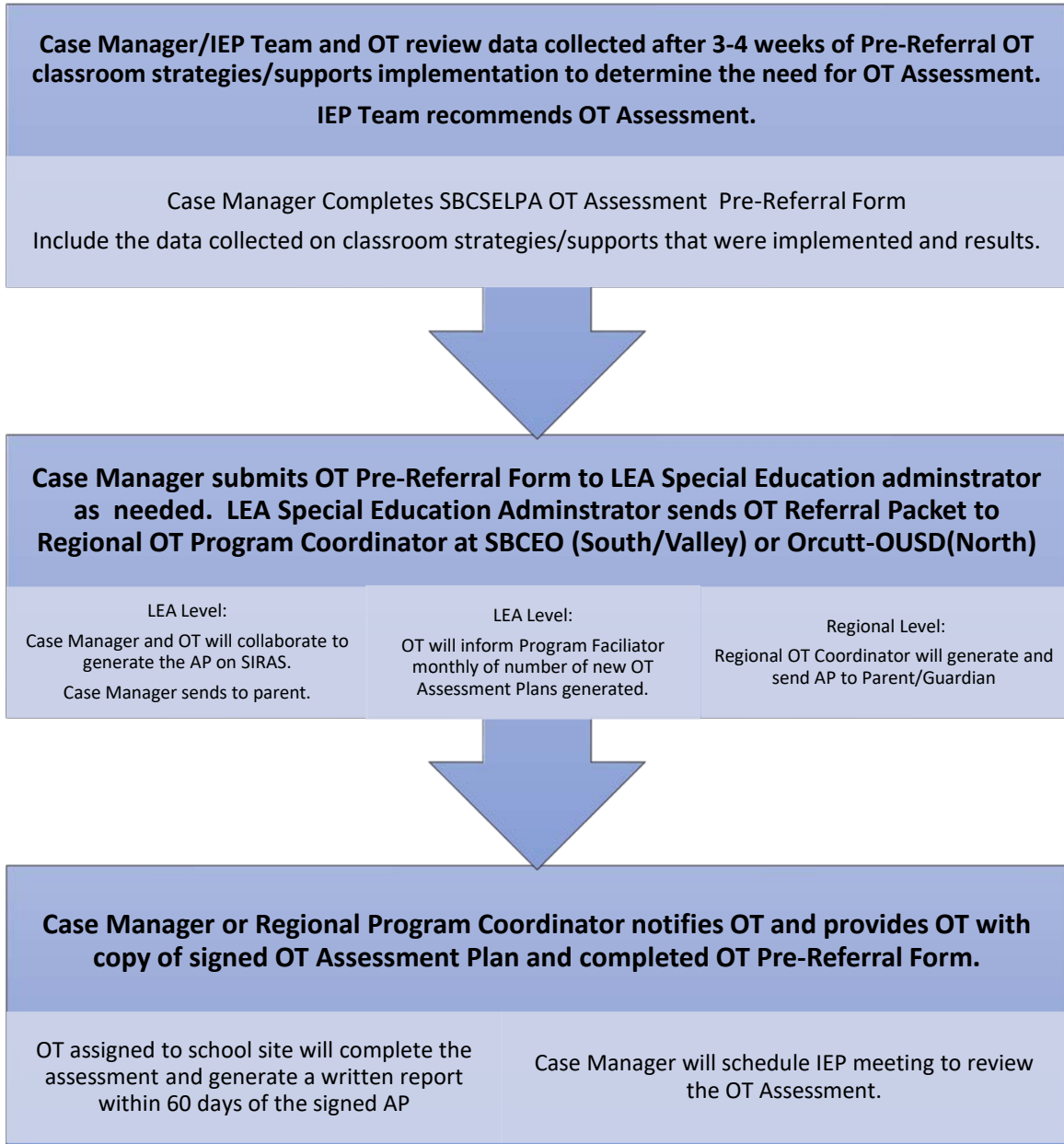
Occupational Therapy (OT) Assessment Pre-Referral Process



*For Parent/Guardian request for OT assessment, please refer to the *OT Services MTSS and Assessment Referral Guidelines* in the Santa Barbara County SELPA's Procedural Handbook, Section 2. All requests for OT Assessments are recommended to follow the MTSS 60-day pre-referral process for the IEP team to determine the necessity for assessment.



Occupational Therapy (OT) Assessment Referral Process





OCCUPATIONAL THERAPY ASSESSMENT PRE-REFERRAL FORM

Student:	Date of Birth:
School/Grade:	Teacher:
Case Manager:	Referral Made By:
Areas of Concern:	

1. What task(s) is the student demonstrating challenges with or unable to perform/complete?
2. What is the student's present level of performance on these tasks -- how is he/she currently completing these tasks?
3. What is expected of students in your class at this time of year? For example: correct letter casing, writing 3-4 sentences etc.?
4. Are there additional behavioral or self-regulation concerns in classroom? If yes, please explain.
5. Does the student have a medical diagnosis that may require services or is currently receiving services from California Children's Services (CCS) Medical Therapy unit? (*Cerebral Palsy, Spina Bifida, Muscular dystrophy, Head injuries, Spinal cord injuries, Rheumatoid arthritis, arthrogryposis, osteogenesis imperfecta etc*). If yes, for OT Assessment Referral use the SELPA or your LEA's Release of information to request Physician's letter, and Physician's report/diagnostic pages:

SELPA3: Parent Consent for Release of Information Form

SELPA6: OT Physician's Cover Letter

SELPA 16: Physician's Information Form for Related Services
6. Any additional information:

Please select which interventions have been implemented with the student and add comments as applicable

If you have handwriting concerns with the student, here are some interventions to try:

Interventions	Trialed? (Y/N) Date:	Comments/Efficacy of Intervention
Alternative writing tool/pencil grip, short/ broken crayons		
Adapted paper- graph, larger lines, highlighted lines		
Skip lines when writing		
Visual cue to start at margin		
Use of letter-strip when writing		
Word Processing/Keyboarding		
Speech to Text/Voice typing		
Dictation to Adult Staff		
Voice Recording (gather ideas)		
Letter/Number Manipulatives		
Dictation to Adult Scribe		
Other:		

If you have other fine motor or bilateral coordination concerns with the student, here are some interventions to try:

Interventions	Trialed? (Y/N) Date:	Comments/Efficacy of Intervention
Increased Scissor Use/Practice		
Adapted Scissors		

Crafts that use two hands (beading, lacing)		
Games that use both hands		
Games and movement breaks that require crossing midline and using both sides of body		
Other:		

If you have behavioral self-regulation or sensory processing concerns about the student here are some interventions to try:

Interventions	Tried? (Y/N) Date:	Comments/Efficacy
Static fidget tools at desk: Velcro strip, theraband/foot fidget		
Active fidget tools: theraputty, playdoh, squeeze ball		
Oral Motor Tools/Gum (if allowed)		
Flexible seating that allows movement or supports posture: seat cushion, wobble stool, ball chair, floor chair, foot support		
Flexible positioning: stand up desk/surface, on floor		
Movement Breaks		
Noise cancelling headphones		
Quiet area/desk carrel,		
Reducing visual/auditory distractions		
Other:		

If student has challenges with following classroom routines and directions to complete tasks, here are some interventions to try:

Intervention	Date Tried? Y/N	Comments/Efficacy:
Flexible Environmental and Seating adaptations		
Information presented in a variety of ways		
Simplified (one step) directions		
Visual Supports for: Schedule/Transition, Task Steps Checklist, Behavior Expectations, Token Economy		
Folders/Containers/Boxes/Bins		
Color Coding, Highlighters, Tabs, Post-its		
Paper/Digital Organizers Planners or Calendars		
Visual or Audio Timers		
Timed digital reminders		
Study guide/copy of notes		
Other:		

Are there any other concerns in additional areas such as campus accessibility, adaptive daily living skills (eating, dressing, toileting) or pre-vocational/vocational skills (unable to perform certain job tasks)?

Skill	What interventions are in place now?	Comment/Efficacy

Referral for Occupational Therapy Assessment:
Must check “yes” to proceed to next step

Has the IEP team tried interventions on this form to support this student? If not, try some interventions above now.	Yes No	Date:
Has the IEP team taken data on use of these or any other additional interventions? Include additional data with dates.	Yes No	Date:
Is the student demonstrating progress with these additional interventions? If not, IEP team consult with school site OT to complete OT observation, with signed consent of parent.	Yes No	Date:
OT Observation Form Consent signed and returned by Parent/Guardian	Yes No	Date:
After 3-4 weeks of taking data, has the student shown progress with OT recommended interventions?	Yes No	Date:

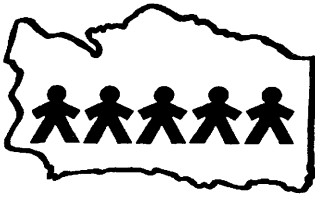
For Special Education Use Only

Has the school site Occupational Therapist reviewed this document with case manager?	Yes No	Date:
Does the IEP team recommend that the student receive a formal Occupational Therapy Assessment?	Yes No	Date:
LEA Special Education Administrator Review	Yes No	Date:
*Received by Regional Program OT Coordinator (Non-LEA) (SBCEO-South County/Valley, OUSD-North County)	Yes No	Date:
LEA OR Regional Program Assessment Plan generated?	Yes No	Date:
Signed Assessment plan received?	Yes No	Date:
Assessment Report/IEP Meeting Due:	Date:	

*Only needed if OT services are provided by a Regional Program vs. within LEA

Staff Signature: _____ Title: _____

School/District: _____ Date: _____



Santa Barbara County
Special Education Local Plan Area
 A Joint Powers Agency

Date: March 1, 2021

To: SBCSELPA JPA Board

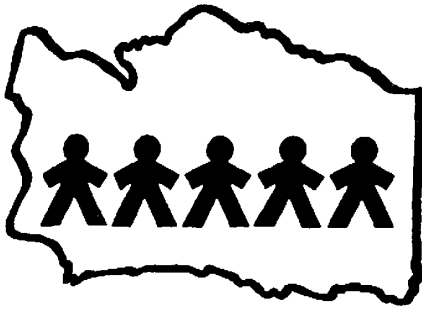
From: Jennifer Connolly, SBCSELPA Coordinator

Re: **Announcement of 2nd Annual SELPA-Bration Winners**

BACKGROUND:

- SBCSELPA opened nominations for the Second Annual SELPA-Bration Awards in October of 2020 in Santa Barbara County.
- Nomination forms were provided to Special Education Directors monthly at the Special Education Administrators Meeting (SEAM) to share with staff by an online form link through Survey Monkey and through a Word document.
- On February 1, the SBCSELPA Community Advisory Committee (CAC), composed of Parent Representatives and Professional Representatives from each LEA in Santa Barbara County, were presented with 54 nominations for the SELPA-Bration Awards to review.
- The CAC reviewed each nomination and voted by ballot on the nominees, returning the ballots to SBCSELPA Executive Secretary, Lindsay MacDonald, to tally to reveal the winners.
- **Join us in congratulating the following amazing winners:**
 - Laura Ishikawa**, Special Education Preschool Teacher, SBCEO
 - Jessica Violetti**, Special Education K-6 Teacher, SMB
 - Sarah Furtado**, Special Education Junior High Teacher, SMB
 - Brett Selvy**, Special Education High School Teacher, Lompoc
 - Alice Robles**, General Education Teacher, Goleta
 - Paloma Guerrero**, Instructional Assistant, SBCEO
 - Carmen Chavez**, Site Administrator, Lompoc
 - Kirsten Escobedo**, District Administrator, SBCEO
 - Paul Hokedo**, District Clerk, SBCEO
 - Rachel Garcia Audet**, Related Service Provider, DHH Infant Specialist, SBCEO
 - Alpha Resource Center** (Patty Moore and team), Agency
- SELPA-Bration will be held on May 4, 2021, time to be determined.

RA/JC:lm



Santa Barbara County
Special Education Local Plan Area
 A Joint Powers Agency

Date: March 1, 2021

To: SBCSELPA JPA Board

From: Jennifer Connolly, SBCSELPA Coordinator

Re: March 2021 Professional Development Offerings

➤ To Register go to <https://sbcselpa.k12oms.org/>

MARCH 2021

March	Host	Time/ Location	Title
3/2/2021	SBCSELPA	2:00-3:00 Zoom	Assistive Technology Services Overview for Mild/Moderate Teachers
3/3/2021	SBCSELPA	2:00-3:00 Zoom All County	Expanding Students' Language Access in Proloquo2Go
3/4/2021	SBCSELPA	8:30-3:00 Zoom or In Person North SBC	One-Day Initial , Nonviolent Crisis Prevention Intervention
3/4/2021	SBCSELPA	2:00-3:30 Zoom All County	Expanding Students' Language Access in Proloquo2Go
3/10/2021	SBCSELPA and C.A.P.T.A.I.N.	2:00-3:30 Zoom All County	Evidence Based Practices in Autism by C.A.P.T.A.I.N.
3/11/2021	SBCSELPA	2:00-3:00 Zoom All County	Teaching and Modeling AAC in the Classroom
3/16/2021	SBCSELPA and Southern CA Diagnostic Center.	Zoom	Patterns of Strengths and Weaknesses Coaching with Amy Taylor
3/18/2020	SBCSELPA and Southern CA Diagnostic Center	12:00-3:00 Zoom provided by SCADC	Still Not Producing: Assessment and Intervention for Executive Function Difficulties (For Psychologists, Educators)
3/18/2021	SBCSELPA	8:30-3:00 Zoom or In Person South SBC	One-Day Initial , Nonviolent Crisis Prevention Intervention

Professional Development Offerings 2020-2021



Santa Barbara County
Special Education Local Plan Area
SELPA

(Revised February 2021)

Professional Development Offerings

Table of Contents

	Page
Santa Barbara County SELPA	3
The Law, Child Find	4
District Special Education Programs	5
About professional development offerings	6
How to schedule a professional development offering	6
Professional Development Calendar of Events by the Month	7
Professional Development Event Descriptions by Topic	15
'Mini' LEA Professional Development Topics Available Upon Request	25
LEA Scheduled 'Mini' Professional Development	32
SBCSELPA Staff	35
Presenter contacts	36
 Available Resources 	
OMS Online Registration for Events	40
Special Education Parent Handbook	
What are all these IEP Documents? Parent Questions for an IEP	
SBCSELPA Local Plan	
SBCSELPA Procedural Handbook	
Special Education Parent Handbook	
Turning 3: Transition from Early Start to Preschool	
SIRAS Systems (IEP development)	
Santa Barbara SBCSELPA Conference Room	
SBCSELPA YouTube Channel for all recorded trainings	

This Professional Development Offerings Booklet is updated monthly.

Santa Barbara County Special Education Local Plan Area SELPA

The Santa Barbara County Special Education Local Plan Area (SBC SELPA) is a Joint powers Agency mandated to govern and facilitate special education programs administered by the Local Education Agencies (LEAs)/school districts within Santa Barbara County.

Santa Barbara County Special Education Local Plan Area (SBC SELPA) provides an array of services to the 20 school districts and 4 charter schools throughout Santa Barbara County. These services include the following:

- Oversight and case management for students placed in residential treatment nonpublic schools (NPSs)
- Wraparound social work services
- Coordinates student mental health IEP related services and NPS placements for LEAs
- Provides BCBA behavioral consult services to LEAs
- Provides educational audiologist consult services to LEAs
- Coordinates with private schools for the support of Child Find and Individual Service Plans (ISPs)
- Allocates funding for special education services
- Providing training opportunities for LEA staff, parents, and community
- Allocates and manages low incidence equipment and services funding
- Develops and governs Local Plan special education policy and procedures for participating LEAs
- Engages in interagency agreements with agencies such as Tri-Counties Regional Center and California Children's Services (CCS)
- Establishes a Community Advisory Committee (CAC) that advises the governing board and assists in parent and school education
- Provides Medical Therapy Units (MTUs) for CCS
- Provides Alternative Dispute Resolution (ADR) to LEAs/ districts and parents/guardians
- Provides advisement specific to federal and state special education law
- Provides advisement from State SELPA
- Maintains the Local Plan, Procedural Handbook, and website www.sbcselpa.org for Santa Barbara County SELPA

The Law

The Individuals with Disabilities Education Act (IDEA) and California special education laws guarantee all students with disabilities a Free, Appropriate Public Education (FAPE) in the least restrictive environment. The SBC SELPA and its member districts do not discriminate on the basis of race, color, national origin, religion, sex, or disability in educational programs and activities or employment practices, as required by Title 6 of the Civil Rights Act of 1964, Title 9 of the Educational Amendments of 1972, and Section 504 of the Rehabilitation Act of 1973.

Child Find

Special education programs are available to all eligible students with disabilities, ages 0-22 in Santa Barbara County. The Child Find mandate applies to all children who reside within a State, including children who attend private schools and public schools, highly mobile children, migrant children, homeless children, and children who are wards of the state. (20 U.S.C. 1412(a)(3)) This includes all children who are suspected of having a disability, including children who receive passing grades and are "advancing from grade to grade.

All individuals with disabilities residing in the state, including pupils with disabilities enrolled in Elementary and Secondary schools and Private schools, including parochial schools, regardless of the severity of their disabilities, and who are in need of special education and related services, will be identified, located and assessed as required in each district. SBC SELPA, in partnership with the local school districts and county office shall establish written policies and procedures for screening, referral assessment, identification, planning, implementation, review, and three-year triennial assessment for all children who reside in the State of California who are suspected of having a disability. Section 1412 of Title 20 of the U. S. Code.

District Special Education Programs

Adelante Charter School	805-966-7392
Ballard School District	805-688-4222
Blochman Union School District	805-922-0334
Buellton Union School District	805-688-4222
Carpinteria Unified School District	805-684-7657
Cold Spring School District	805-964-4711
College School District	805-922-0334
Cuyama Joint Unified School District	805-922-0334
Family Partnership Charter School	805-686-5339
Goleta Union School District	805-681-1200
Guadalupe Union School District	805-343-2114
Hope School District	805-682-2564
Lompoc Unified School District	805-742-3300
Los Olivos School District	805-688-4222
Manzanita Public Charter School	805-734-5600
Montecito Union School District	805-964-4711
Orcutt Union School District	805-938-8960
Santa Barbara Charter School	805-967-6522
Santa Barbara Unified School District	805-963-4331
Santa Maria Bonita School District	805-928-1783
Santa Maria Joint Union High School District	805-922-4573
Santa Ynez Valley Union High School District	805-688-4222
Solvang School District	805-688-4222
Vista del Mar Union School District	805-688-4222

About Professional Development Offerings

Professional Development Offerings are the creation of a survey and direct input from Directors and Special Education Leadership. Each year, the Professional Development offerings are reviewed/revised with District and County Special Education Leadership and staff to ensure all topics emphasize student, district, and the county needs. Presenter (s), dates/times, and locations are subject to change based on staff attendance and venue availability.

How to Schedule a Professional Development Offering

Mini Professional Development Offerings individualized to each district request.

1. Districts: contact Jennifer Connolly at jconnolly@sbceo.org to request the Professional Development topic.
 - Propose dates/time, location
 - Requests must be in writing via email, received a month in advance.
2. The presenter(s) to be contacted by Jennifer Connolly with the Professional Development topic (s) and proposed dates. Presenter (s) will affirm date, location, and time.
3. Districts will receive confirmation of Professional Development date (s), location, and presenter name (s) and presenter (s) contact information within five business days of the request.
4. The Professional Development event to be added to the OMS calendar for tracking purposes.
5. Attendance: Participants of the Mini Professional Development events do not have to register on OMS.

District Special Education Director or Leadership team encourages participants to attend events. District Special Education Director or Leadership team to confirm number of attendees with presenter (s) for handouts.

6. Presenter (s) subject to change due to unforeseen emergencies.
7. District venues subject to change due to number of participants for Professional Development.
8. If more than one district requests the same topic on the same day, event may include more than one district.

Large Professional Development Offerings for North, Mid, South County

1. Access the SBC SELPA OMS system at <https://sbcselpa.k12oms.org/>
2. If registrant does not have an account, create an OMS account.
3. Select the link on the calendar and complete the registration.
4. No Phone Registrations

2020-2021 Professional Development Calendar of Events by the Month

Presentations are free unless indicated. To Register go to

<https://sbcseelpa.k12oms.org/>

This Professional Development Offerings Booklet is updated monthly.

August

August	Host	Time/ Location	Title
8/6/2020	SBCSELPA	8:30-3:00 Zoom, North SBC	One-Day Refresher, Nonviolent Crisis Prevention Intervention
8/11/2020	SBCSELPA	1:30-3:00 Zoom All County	SIRAS Summer Updates: review of new SIRAS features developed over the summer.
8/12/2020	SBCSELPA	8:30-3:00 Zoom All County	Introduction to G.R.O.W. for new staff and new programs.
8/19/2020	SBCSELPA	1:00-2:00 Zoom G.R.O.W Programs	G.R.O.W for Elementary Programs (For T.L.P. programs only)
8/20/2020	SBCSELPA	1:00-2:00 Zoom G.R.O.W Programs	G.R.O.W for Middle School Programs (For T.L.P. programs only)
8/21/2020	SBCSELPA	1:00-2:00 Zoom G.R.O.W Programs	G.R.O.W for High School Programs (For T.L.P. programs only)
8/25/2020	SBCSELPA	1:30-3:00 Zoom All County	(Repeated) SIRAS Summer Updates: review of new SIRAS features developed over the summer. Open to All Staff!
8/26/2020	SBCSELPA	1:00-2:00 Zoom G.R.O.W Programs	G.R.O.W for Elementary Programs (For T.L.P. programs only)
8/27/2020	SBCSELPA	1:00-2:00 Zoom G.R.O.W Programs	G.R.O.W for Middle School Programs (For T.L.P. programs only)
8/27/2020	SBCSELPA	8:30-3:00 Zoom, South SBC	One-Day Refresher, Nonviolent Crisis Prevention Intervention
8/31/2020	SBCSELPA	2:00-3:00 Zoom All County	Digital Tools for Distance Learning

2020-2021 Professional Development Calendar of Events by the Month

To Register go to <https://sbcselpa.k12oms.org/>

September

September	Host	Time/ Location	Title
9/3/2020	SBCSELPA	8:30-3:00 Zoom, North SBC	One-Day Refresher, Nonviolent Crisis Prevention Intervention
9/8/2020	SBCSELPA and C.A.P.T.A.I.N.	2:00-4:00 Zoom All County Administrators	C.A.P.T.A.I.N. California Autism Professional Training and Information Network an Introduction for all county Administrators
9/10/2020	SBCSELPA	1:00-2:30 Zoom All County	SIRAS for Translators
9/14/2020	SBCSELPA	2:00-3:00 Zoom All County	Virtual Classroom Platforms/ Zoom and Google Classroom
9/15/2020	SBCSELPA	2:00-4:00 Zoom All County Administrators	Conscious Discipline Modules an Introduction for all county Administrators
9/16/2020	SBCSELPA	1:30-3:00 Zoom Nurses	Nurses Network
9/17/2020	SBCSELPA	8:30-3:00 Zoom, South SBC	One-Day Refresher, Nonviolent Crisis Prevention Intervention
9/21/2020	SBCSELPA	8:30-12:30 Zoom All County ADMIN, Clerks, CALPADS	Fall 1 Review with Brian Marcontell from SIRAS
9/21/2020	SBCSELPA	1:00-2:00 Zoom All County OTs	All County Occupational Therapist Network Meeting
9/21/2020	SBCSELPA	2:00-3:00 Zoom All County	Digital Tools: Attendance/Tracking Tools/Instructional Assessment Tools
9/22/2020	SBCSELPA	2:00-4:00 Zoom All County Administrators	Trauma Informed Education for All County Administrators
9/22/2020	SBCSELPA	2:00-4:00 Zoom All Moderate/Severe Teachers	All County Moderate/Severe Teachers Network Meeting 2:00-2:30 Preschool 2:30-3:00 Elementary 3:00-3:30 High School
9/23/2020	SBCSELPA	2:00-3:00 Zoom All SLPs	All County Speech and Language Pathologists Network Meeting
9/28/2020	SBCSELPA	2:00-3:00 Zoom All County	Digital Tools: Communication tools.
9/29/2020	SBCSELPA	2:00-4:00 Zoom	All County Mild/Moderate Teachers Network Meeting 2:00-2:30 Preschool

		All Mild/Moderate teachers	2:30-3:00 Elementary 3:00-3:30 High School
9/30/2020	SBCSELPA and C.A.P.T.A.I.N.	2:00-3:30 Zoom All County	Evidence Based Practices in Autism by C.A.P.T.A.I.N.

2020-2021 Professional Development Calendar of Events by the Month

To Register go to <https://sbcselfpa.k12oms.org/>

October

October	Host	Time/ Location	Title
10/1/2020	SBCSELPA	8:30-3:00 Zoom, North SBC	One-Day Refresher, Nonviolent Crisis Prevention Intervention
10/6/2020	SBCSELPA	2:00-4:00 Zoom All County Administrators	What is SBCSELPA? Updates on Distance Learning in Special Education for all county Administrators
10/7/ 2020 - 10/8/2020	SBCSELPA & Lindamood- Bell	12:00-3:30 Zoom Days 1 & 2 of four afternoons workshops	Lindamood-Bell presents Visualizing and Verbalizing: one seat free per district.
10/13/2020	SBCSELPA and Agency Partners	1:00-3:00 Zoom All County	(Postponed to a later date) North County Transition Fair
10/14/2020 - 10/15/2020	SBCSELPA & Lindamood- Bell	12:00-3:30 Zoom Days 3 & 4 of four afternoons workshops	Lindamood-Bell presents Visualizing and Verbalizing: one seat free per district.
10/16/2020	CCASP	9:00-12:00 Zoom provided by CCASP	Central Coast School Psychologists Presents: Legal Updates by Wes Parsons from F3. Registration http://ccasponline.org
10/19/2020	SBCSELPA	12:00-1:00 Zoom All BCBAs	All County BCBAs Network Meeting
10/20/2020	SBCSELPA	3:00-4:00 Zoom All OTs	OT Network Meeting
10/21/2020	SBCSELPA and C.A.P.T.A.I.N.	2:00-2:30 Zoom All County	Evidence Based Practices in Autism by C.A.P.T.A.I.N.
10/22/2020	SBCSELPA	8:30-3:00 Zoom, South SBC	One-Day Refresher, Nonviolent Crisis Prevention Intervention
10/23/2020	SBCSELPA	2:00-3:00	SLP Network Meeting

		Zoom All SLPs	
10/27/2020	SBCSELPA	3:00-4:00 Zoom All County	SELPA-Bratton Awards
10/28/2020- 10/29/2020	SBCSELPA	1:30-3:30 Zoom All County	Dyslexia Training Institute

2020-2021 Professional Development Calendar of Events by the Month

To Register go to <https://sbcselpa.k12oms.org/>

November

November	Host	Time/ Location	Title
11/3/2020	SBCSELPA	8:30-11:30 All county	Jan Tomsy Legal 'Hot Topics in Special Education'
11/3/2020	SBCSELPA	2:00-2:00 All M/M Teachers	Mild/Moderate Teachers Network Meeting
11/4/2020	SBCSELPA	2:00-3:00 All M/S Teachers	Moderate/Severe Teachers Network Meeting
11/5/2020	SBCSELPA	8:30-3:00 Zoom, North SBC	One-Day Refresher, Nonviolent Crisis Prevention Intervention
11/19/2020	SBCSELPA	8:30-3:00 Zoom, South SBC	One-Day Refresher, Nonviolent Crisis Prevention Intervention

2020-2021 Professional Development Calendar of Events by the Month

To Register go to <https://sbcselpa.k12oms.org/>

December

December	Host	Time/ Location	Title
12/2/2020	SBCSELPA	2:00-3:30 Zoom All County	Moderate/Severe Teachers Network Meeting
12/3/2020	SBCSELPA	2:00-3:00 Zoom All County	Mild/Moderate Teachers Network Meeting
12/8/2020	SBCSELPA	2:00-3:00 Zoom All County	Speech and Language Network Meeting

12/9/2020	SBCSELPA and C.A.P.T.A.I.N.	2:00-3:30 Zoom All County	Evidence Based Practices in Autism by C.A.P.T.A.I.N.
12/10/2020	SBCSELPA and Southern CA Diagnostic Center	12:00-3:00 Zoom Provided by SCADC	Autism Spectrum Disorder (ASD): What Every Para educator Should Know (For Para educators working with students with ASD)
12/14/2020	SBCSELPA	2:00-3:00 Zoom All County	OT Network Meeting

2021 Professional Development Calendar of Events by the Month

To Register go to <https://sbcselpa.k12oms.org/>

January

January	Host	Time/ Location	Title
1/20/2021	SBCSELPA and Southern CA Diagnostic Center	8:30-3:00 Zoom	Patterns of Strengths and Weaknesses, presented by the Diagnostic Center, Southern California
1/21/2021	SBCSELPA and Southern CA Diagnostic Center	2:00-3:30 Zoom provided by SCADC	Battery Not Included: Assessing Complex Communication Needs of Students Who Cannot Access Formalized Testing (For SLPs)
1/25/2021	SBCSELPA	2:00-3:00 Zoom All County	Occupational Therapy Network Meeting
1/26/2021	SBCSELPA	2:00-3:00 Zoom All County	Moderate/Severe Teacher Network Meeting
1/27/2021	SBCSELPA	2:00-3:00 Zoom All County	Mild/Moderate Teacher Network Meeting
1/28/2021	SBCSELPA	2:00-3:00 Zoom All County	Speech and Language Network Meeting
1/28/2021	SBCSELPA	8:30-3:00 Zoom North SBC	One-Day Initial , Nonviolent Crisis Prevention Intervention- without the physical units.

2021 Professional Development Calendar of Events by the Month

To Register go to <https://sbcselpa.k12oms.org/>

February

February	Host	Time/ Location	Title
2/3/2021	SBCSELPA	2:00-3:30 Zoom All County	Traumatic Brain Injury (TBI)
2/9/2021	SBCSELPA	2:00-3:00 Zoom	Assistive Technology Services Overview for Occupational Therapists
2/16/2021	SBCSELPA	2:00-3:00 Zoom All County	Assistive Technology Services Overview for Speech and Language Pathologists
2/17/2021	SBCSELPA	1:00-3:00 Zoom All County	SIRAS Updates with Michael Brown
2/23/2021	SBCSELPA and Southern CA Diagnostic Center	12:00-3:30 Zoom Provided by SCADC	Ensuring Successful Transition to Adulthood for Students with Moderate to Severe Disabilities (For Educators, Program Specialists, Admin., Parents)
2/23/2021	SBCSELPA	2:00-3:00 Zoom	Assistive Technology Services Overview for Moderate/Severe Teachers
2/23/2021	SBCSELPA and Southern CA Diagnostic Center	Zoom Time 9:00-2:00 by Coach	Patterns of Strengths and Weaknesses Coaching with Amy Taylor
2/24/2021	SBCSELPA and C.A.P.T.A.I.N.	2:00-3:30 Zoom All County	Evidence Based Practices in Autism by C.A.P.T.A.I.N. (Cohort 2)
2/25/2021	SBCSELPA	8:30-3:00 Zoom South SBC	One-Day Refresher, Nonviolent Crisis Prevention Intervention
2/25/2021	SBCSELPA and Southern CA Diagnostic Center	Zoom Time 9:00-2:00 by Coach	Patterns of Strengths and Weaknesses Coaching with Amy Taylor

2020-2021 Professional Development Calendar of Events by the Month

To Register go to <https://sbcselpa.k12oms.org/>

March

March	Host	Time/ Location	Title
3/2/2021	SBCSELPA	2:00-3:00 Zoom	Assistive Technology Services Overview for Mild/Moderate Teachers
3/3/2021	SBCSELPA	2:00-3:00 Zoom All County	Expanding Students' Language Access in Proloquo2Go
3/4/2021	SBCSELPA	8:30-3:00 Zoom or In Person North SBC	One-Day Initial , Nonviolent Crisis Prevention Intervention
3/4/2021	SBCSELPA	2:00-3:00 Zoom All County	Expanding Students' Language Access in Proloquo2Go
3/10/2021	SBCSELPA and C.A.P.T.A.I.N.	2:00-3:30 Zoom All County	Evidence Based Practices in Autism by C.A.P.T.A.I.N.
3/11/2021	SBCSELPA	2:00-3:00 Zoom All County	Teaching and Modeling AAC in the Classroom
3/16/2021	SBCSELPA and Southern CA Diagnostic Center	Zoom	Patterns of Strengths and Weaknesses Coaching with Amy Taylor
3/18/2020	SBCSELPA and Southern CA Diagnostic Center	12:00-3:00 Zoom provided by SCADC	Still Not Producing: Assessment and Intervention for Executive Function Difficulties (For Psychologists, Educators)
3/18/2021	SBCSELPA	8:30-3:00 Zoom or In Person South SBC	One-Day Initial , Nonviolent Crisis Prevention Intervention

2020-2021 Professional Development Calendar of Events by the Month

To Register go to <https://sbcselpa.k12oms.org/>

April

April	Host	Time/ Location	Title
4/15/2021	SBCSELPA	8:30-3:00 Zoom or In Person South SBC	One-Day Initial , Nonviolent Crisis Prevention Intervention
4/20/2021	SBCSELPA and Southern CA Diagnostic Center	Zoom 1:30-3:30	Patterns of Strengths and Weaknesses Coaching with Amy Taylor
4/28/2021	SBCSELPA and CCASP	All County 8:30-10:30 Zoom	Legal Updates with Jan Tomsy
Date to be determined (tentative date- awaiting response)	SBCSELPA and SLOSELPA	12:00-4:00 Zoom All County	ADOS: Autism Diagnostic Observation Schedule

2020-2021 Professional Development Calendar of Events by the Month

To Register go to <https://sbcselpa.k12oms.org/>

May

May	Host	Time/ Location	Title
5/6/2021	SBCSELPA	8:30-3:00 Zoom or In Person South SBC	One-Day Initial , Nonviolent Crisis Prevention Intervention
5/13/2021	SBCSELPA	8:30-3:00 Zoom, North SBC	One-Day Refresher, Nonviolent Crisis Prevention Intervention
5/19/2021	SBCSELPA and C.A.P.T.A.I.N.	2:00-3:30 Zoom All County	Evidence Based Practices in Autism by C.A.P.T.A.I.N.

Professional Development Event Descriptions by Topic



Administrators

SBCSELPA Administrators Academy

Administrators Academy is designed to provide information to new or existing school leaders and Administrators on compliant best practices in special education including topics related to the Annual Performance Indicators Report (PIR) Targets. Sections of the Santa Barbara County SELPA Local Plan and Procedural Handbook will be discussed. Participants will have the opportunity to ask questions and discuss a variety of issues.

The six topics presented on Tuesdays from 2:00-4:00 in the month of September for Administrators Academy will be the following:

- 1. August 25: SIRAS Updates*
- 2. September 1: G.R.O.W.
(G.R.O.W. Growth Mindset, Resilience, Other Centered, Work Ethic)*
- 3. September 8: C.A.P.T.A.I.N: California Autism Professional Training and Information Network*
- 4. September 15: Conscious Discipline Modules, an introduction.*
- 5. September 22: Trauma Informed Practices for Schools*
- 6. October 6: What is SBCSELPA? Special Education and Distance Learning*

Assessment

Patterns of Strengths and Weaknesses (PSW)

A Pattern of Strengths and Weaknesses (PSW) is one of the three methods school districts may use when determining a student's eligibility under Specific Learning Disability (SLD) category. As opposed to the discrepancy model, which informs the team if a student is performing more poorly than expected, PSW seeks to determine why, thus effectively linking assessment to intervention. Participants will be presented with information necessary to understand, interpret, and apply the PSW model to SLD eligibility in order to be consistent with California Special Education law. The different ways of qualifying for SLD will also be presented along with why PSW evolved.

Assistive Technology

Assistive Technology Services Overview

Lisa Foote, SBCSELPA AT/AAC Specialist will orient you to the new SBC SELPA AT/AAC Specialist supports and assessment referral process. Each session will be targeted for a specific group of IEP team members and discuss their collaborative roles in the consideration of AT and/or AAC supports for students in special education as well as touch on aspects of the principles of Universal Design for Learning (UDL) and the Student-Environment-Task-Tool (SETT) framework to guide the consideration of students' need for Assistive Technology.

Consecutive Tuesdays:

February 9th- Occupational Therapists

February 16th- Speech Language Pathologists

February 23rd- Moderate/Severe SPED Teachers

March 2nd- Mild/Moderate SPED Teachers

Expanding Students' Language Access in Proloquo2Go

Lisa Foote, SBCSELPA AT/AAC Specialist presents on tips and tricks for expanding students' language access in Proloquo2Go. Do you have students who currently use Proloquo2Go with limited vocabulary and function? Have they been using the same set up for multiple years? Do you feel limited or overwhelmed by how to use it with your students? Come to one or both of these sessions to explore ways to expand student language access specifically within Proloquo2Go. Learn how to incorporate and build routines for AAC aided language stimulation within the classroom and/or therapy session. Please attend with a device installed with Proloquo2Go for best learning outcomes.

Dates: Wednesday March 3rd, Thursday March 4th, 2:00-3:30 pm

Teaching and Modeling AAC Language in the Classroom

Lisa Foote, SBCSELPA AT/AAC Specialist presents tips on how you can provide Aided Language Stimulation in the classroom to expand the language access and support students who use AAC throughout the day with the S'MORRES model and "core words" approach. Learn how to incorporate both low-tech and high-tech AAC in your classroom, and what AAC strategies can best fit your teaching style, your student population, and classroom culture. This session will help you to go beyond just using AAC language for highly structured and routine activities such as calendar/weather/greetings and basic student request/choices functions. Please bring a device installed with any type of AAC software for best learning outcomes.

Date: Thursday, March 11th 2:00-3:00

Autism

ADOS Autism Diagnostic Observation Schedule (TBD)

The Autism Diagnostic Observation Schedule (ADOS) is an instrument for assessing Autism Spectrum Disorder. The protocol consists of a series of structured and semi-structured tasks that involve social interaction between the examiner and the individual under assessment. The examiner observes and identifies the potential diagnosis of classic Autistic Disorder or related autism spectrum disorders, allowing a standardized assessment of autistic symptoms. Each subject is administered activities from just one of the four modules. The selection of an appropriate module is based on the developmental and language level of the referred individual. Module 1 is used with children who use little or no speech. Subjects that do use phrase speech but do not speak fluently are administered Module 2. Module 3 is for younger subjects who are verbally fluent. Module 4 is used with adolescents and adults who are verbally fluent.

Evidence Based Practices in Autism by C.A.P.T.A.I.N.

C.A.P.T.A.I.N. (California Autism Professional Training and Information Network) is dedicated to providing statewide access to training and resources in Evidence Based Practices (EBPs) that are culturally sensitive, family centered, cost effective, and competency based. Supporting locally based trainings with trainers of trainers at the local level. Emphasizing how to use EBPs to assist students in accessing the California Common Core State Standards and developing College and Career Readiness. Providing ongoing training, support, and technical assistance to implement EBPs and ensure fidelity of implementation. Supporting the development of local multiagency collaborations to support consistent use of EBPs. In addition to providing web based access to materials and resources that are vetted and aligned with current EBPs.



Behavior

Behavior Series

Data Collection in Special Education

In this training, participants will have the opportunity to learn about the most common types of data systems used in special education programs (e.g., frequency, duration) and how different IEP goals require different types of data collection. Particular attention will also be given to how to accurately collect ABC data and participants will have opportunities to practice this through case examples and group activities.

Understanding the Functions of Behavior

The focus of this training will be helping participants learn that behaviors are information and serve a number of different functions. Once functions are understood then skills can be developed that allow students to navigate through struggles in a more adaptive manner.

Fundamentals of Behavior

To help educational staff broaden their understanding of “behaviors” in students, this training will introduce them to the science of behavior, including the neuro-biological cycle of behavior that is true for all human beings. Additionally, information related to ACES, trauma, learning challenges, and chronic stress experiences will be presented to help participants examine their own narratives about behaviors in students.

De-Escalation Strategies: Guiding Principles and Next Steps

In this training, participants will have the opportunity to learn guiding principles for de-escalating students during behavioral/emotional responses and the importance of proactive strategies to mitigate escalation cycles.

Behavior Intervention Plans (BIP) (TBD)

SELPA PENT Cadre members will take participants through all the steps of a behavior intervention planning process.

Multi-Tiered System of Supports for Behavior and Social Success

The implementation of school-wide classroom and research-based positive behavior emotional supports promotes successful social and learning outcomes. In this training, a practical application for social/emotional supports to be discussed. Resources for implementing behavior and social/emotional interventions at each tiered level will encompass this training.



Crisis Prevention

Nonviolent Crisis Prevention Intervention:

One-Day Refresher:

The One-Day Refresher Course is designed for persons who need to re-certify and have already taken the Initial Course and received certification.

Investment: \$20 for Staff and Parents of students attending public school within Santa Barbara County, \$30 all other participants.

Two-Day Initial:

The Two-day Initial Course is designed for school staff working with students who have the potential for demonstrating “acting out” behavior.

Investment: \$20 for Staff and Parents of students attending public school within Santa Barbara County, \$30 all other participants.

Conscious Discipline Modules

Developed by Dr. Becky Bailey, watch a series of training modules on Conscious Discipline, an evidence-based, trauma-informed social-emotional learning program. At the end of the module, a facilitated discussion will take place to review the information covered.



Digital Tools for Distance Learning

The Digital Tools for Distance Learning four days offers the participant a look at various helpful methods for teaching on a digital platform. During the four Monday's, participates will become familiar with the following:

Day 1: Monday, August 31, 2:00-3:00: Digital Tools for Distance Learning, an overview

Day 2: Monday, September 14, 2:00-3:00: Virtual Classroom Platforms/ Zoom/ Google Classroom

Day 3: Monday, September 21, 2:00-3:00: Attendance/ Tracking tools/ Instructional Assessment Tools

Day 4: Monday, September 28, 2:00-3:00: Communication Tools

Southern California Diagnostic Center Trainings

****Please follow the steps on the flyer for registration for Diagnostic Center Events. All Diagnostic Center Trainings are prerecorded. A Zoom link will be sent to participants via the Southern California Diagnostic Center.**

A-4: December 10 12:00-3:00 Autism Spectrum Disorder (ASD): What Every Para educator Should Know.

An overview of autism spectrum disorder (ASD) and practical information para educators can use for effective teaching. Strategies and behavior supports will be discussed and include visual pacing and closure systems, schedules, prompting hierarchies, and reinforcement principles.

Audience: *Para educators working with students with ASD.*

R-1: January 21 (Time TBD) Battery Not Included: Assessing Complex Communication Needs of Students Who Cannot Access Formalized Testing

Meaningful assessment is an essential first step toward appropriate goals and intervention. However, not all students are responsive to a standard testing approach (e.g., formal test battery dependent on verbal/motor responses). Students with severe and multiple disabilities often experience complex communication disorders which are inseparable from learning and behavior. Students who live in complex bodies present a challenge in determining a consistent and purposeful response pattern to even begin testing. This training will explore the selection and use of appropriate assessment tools designed to assess a student who cannot access traditional measures. The emphasis will be on utilizing multiple assessment procedures that reveal the student's strengths and reliable abilities. Participants will gain knowledge of interdisciplinary assessment practices, communication domains to assess, and how to modify existing tools to gain a clearer picture of a student's communication and learning profile.

Audience: *Speech-language pathologists. If an attendee is not a speech-language pathologist, they need to attend with an SLP from their district to facilitate appropriate teaming. For example, school psychologists, childhood special education teachers, and/or occupational therapists who are qualified to conduct AAC assessments for their school district.*

S-2: February 23 12:00-3:30 Ensuring Successful Transition to Adulthood for Students with Moderate to Severe Disabilities

This training will focus on facilitating successful movement from school to post-secondary activities (e.g., integrated employment if applicable, independent living and community participation) for students with moderate to severe disabilities. Movement to postsecondary activities is guided by the student's strengths, preferences, and interests. Critical to the success of this process is: 1) determining students' developmental profile, 2) translating students' developmental profile into postsecondary activities and goals, and 3) lining up postsecondary activities and goals with Indicator 13 and evidence-based Transition practices and predictors for success. Case studies and visual supports will be used to demonstrate application of practices.

Audience: Secondary Special educators, program specialists, administrators, and parents.

R-3: March 18 12:00-3:00 Still Not Producing: Assessment and Intervention for Executive Function Difficulties

The purpose of this training is to present an advanced overview of the professional field's current thinking about the role and complexity of executive functioning, the process of measuring executive functioning through multiple means, and ways to apply assessment results to real world supports and interventions. Methods of supporting students' executive function system within the school environment will be discussed.

Audience: School psychologists and anyone with knowledge of psychological tests and psychometrics. Participants should have a basic understanding of executive functioning.



G.R.O.W: G.R.O.W. Growth Mindset, Resilience, Other Centered, Work Ethic (For Therapeutic Learning Programs (T.L.P.):

Introduction to G.R.O.W. for new programs and staff

Participants will receive an overview of the G.R.O.W. program, learning about everything from the foundational principles to the specific program components. Through direct instruction, videos, group discussion, and in-vivo practice of skills, participants will learn the science behind the program as well as how put it into practice in the classroom. Although this training is for staff who are new to the G.R.O.W. program, all are welcome to participate.

Skill-Building Sessions

Participants in the G.R.O.W. Skill-Building Sessions can expect to take a deeper dive into the program components covered in the G.R.O.W. Summit. With facilitation, participants will engage in small group role-play activities in order to practice the skills taught in the session. Additionally, participants will have the opportunity to connect and consult with the G.R.O.W. learning community in order to learn from others' successes and problem-solve barriers to program implementation.



Health

Nurses Network

All countywide nurses are welcome to the Nurse's Network. This two hour network meeting will provide nurses a chance to collaborate on current changes in school health with COVID-19.



Inclusion (TBD)



Network Meetings

Network Meetings are scheduled meetings with staff that serve students in a similar way. Network meetings is a time for Teachers, Speech and Language Pathologists, Occupational Therapists, Adapted P.E. Teachers, School Psychologists, Nurses, and BCBAs to collaborate on topics of their profession. Meetings to occur throughout the year each month.



Legal

Jan Tomsy 'Hot Topics in Special Education'

Jan E. Tomsy is a partner at Fagen, Friedman, & Fulfroft, LLP, serving clients from the Oakland office. A nationally recognized leader in special education law, Ms. Tomsy has represented school district clients in mediations and due process hearings, as well as in special education-related litigation in both state and federal courts and in the Ninth Circuit Court of Appeals. Her expertise in special education matters has helped scores of districts to address issues and resolve disputes in this specialized field. Additionally, Ms. Tomsy has assisted districts in countless student expulsion hearings, particularly those that involve complex or sensitive issues, and has successfully defended districts' decisions on appeal to county boards and in court. A popular speaker, Ms. Tomsy is asked to present throughout the country on education and the law. She frequently presents for the Association of California School Administrators, LRP's national Institute (focusing on legal issues related to educating students with disabilities), the LRP Special Education School Attorneys Conference, and the LRP Directors' Summit. Ms. Tomsy is the author of Personal Liability for IDEA

Violations: Where the Courts Stand, and was a contributing author to The Administrator's Guide to Building and Maintaining a Comprehensive Autism Program and IDEA Due Process Survival Guide, all of which are LRP publications. Ms. Tomskey presents 'Hot Topics in Special Education.'



Reading

Dyslexia Training Institute

The Dyslexia Training Institute (DTI) will present a four hour training (2 two hour sessions) on how to identify dyslexia characteristics, student needs and appropriate interventions. The training will include a case study.

Day One Objectives include:

- *When and why to include dyslexia in an IEP or 504Plan*
- *How to identify dyslexia characteristics in a school psych report*
- *How to identify dyslexia characteristics in student work samples*
- *How to identify student needs based on data from school psych report and student work samples*

Day Two Objectives include:

- *What instructional components should remediation include in the areas of decoding, encoding, comprehension and written composition*
- *Accommodations - what are appropriate & how to support students in using them.*

Cost: FREE for four hours of training.

Lindamood- Bell: Visualizing and Verbalizing

The Visualizing and Verbalizing program develops concept imagery- the ability to create an imaged gestalt from language as a basis for comprehension and higher order thinking. The development of concept imagery improves reading and listening comprehension, memory, oral vocabulary, critical thinking, and writing.

Includes Kit.

Related Services

CCASP Symposium October 16, 9:00-12:00

Legal Updates: *The law requires that districts reassess a student with a disability at least once every three years, when a student's changed needs merit a reassessment or upon parental or teacher request. Keeping in mind the backlog of reassessments facing most districts as a result of COVID-19 closures, our*

presentation focuses on the essentials of a compliant and defensible reassessment. Drawing practical lessons from recent decisions, we will discuss the review of existing data, the observation component, assessment reports and much more. Wesley B. Parsons Presents from Fagan, Friedman, and Fulfro.

Registration on <https://ccasponline.org>

Audience: School Psychologists, Speech and Language Pathologists, and Special Education Teachers.

Cost: \$10 for CCASP Members, \$35 for Non-Members.



SELPA-Bratton

The FIRST Annual SELPA-Bratton Awards honors ten staff county wide for their hard work and dedication to students in Special Education. Please join us in honoring ten very deserving recipients.

SIRAS

Summer Updates in SIRAS

SIRAS Systems provides 'Summer Updates' information to all staff sharing the new procedures and forms created over the summer. All staff are invited to this one-hour virtual training.

Introduction to SIRAS for New Staff:

An introduction to SIRAS Systems and IEP writing is provided in this two-hour training. Participants will learn how to schedule a meeting, complete IEP forms, work with Goal Wizard, and how to complete the meeting to be finalized in SIRAS. Training intended for new staff.

SIRAS for Translators:

In this training, SIRAS will provide training to staff involved with translating IEP's into Spanish. A systematic approach will be shown to bilingual staff in how to log into SIRAS, translate each IEP document in SIRAS into Spanish, and how to verify and finalize the changes in SIRAS to send documents home to families.

Social Emotional: Relational Scaffolding: Developing Trust-Based Learning Relationships

Drawing from foundations of interpersonal neurobiology, applied developmental attachment, and specific communication skills; participants will gain a functional understanding of how educators can best utilize relationships with their students

to support social-emotional development, academic access, and a culture of emotional inclusion.



Transition

Transition Fairs

Transition Fair offers families of students transitioning from middle school to high school and high school and beyond the opportunity to talk and gain resources from local agencies and services.

Traumatic Brain Injury

Dr. Jarice Butterfield, Former SBCSELPA Director, Certified Brain Injury Specialist. and author of the Traumatic Brain Injury Added-Authorization through California's Teacher Credentialing presents current information on TBI. Dr. Butterfield is also the author of recent book published on Meeting the Needs of Students with TBI in Education.

‘Mini’ LEA Professional Development Topics Available Upon Request

Contact Jennifer Connolly jconnolly@sbceo.org to book a FREE presentation.

Behavior Series

Data Collection in Special Education

In this training, participants will have the opportunity to learn about the most common types of data systems used in special education programs (e.g., frequency, duration) and how different IEP goals require different types of data collection. Particular attention will also be given to how to accurately collect ABC data and participants will have opportunities to practice this through case examples and group activities.

Understanding the Functions of Behavior

The focus of this training will be helping participants learn that behaviors are information and serve a number of different functions. Once functions are understood then skills can be developed that allow students to navigate through struggles in a more adaptive manner.

Fundamentals of Behavior

To help educational staff broaden their understanding of “behaviors” in students, this training will introduce them to the science of behavior, including the neuro-biological cycle of behavior that is true for all human beings. Additionally, information related to ACES, trauma, learning challenges, and chronic stress experiences will be presented to help participants examine their own narratives about behaviors in students.

De-Escalation Strategies: Guiding Principles and Next Steps

In this training, participants will have the opportunity to learn guiding principles for de-escalating students during behavioral/emotional responses and the importance of proactive strategies to mitigate escalation cycles.

G.R.O.W. Skill-Building Sessions

Participants in the G.R.O.W. Skill-Building Sessions can expect to take a deeper dive into the program components covered in the G.R.O.W. Summit. With facilitation, participants will engage in small group role-play activities in order to practice the skills taught in the sessions. Additionally, participants will have the opportunity to connect and consult with the G.R.O.W. learning community in order to learn from others' successes and problem-solve barriers to program implementation.

Dates:

Elementary Programs (Wednesdays, August 19-October 21)

Middle School Programs (Thursdays, August 20-October 22)

High School Programs (Fridays, August 21- October 23)

Self-Care for the Educator

Self-Care for Educators provides a time to reflect on your own mental health so that you can more effectively support students. In the course of our work, we are confronted with the challenging aspects of life. As Educators, we are asked to “do more with less,” and work within uncertain funding and restrictive policy contexts. The circumstances the youth of today bring to school often impacts not only our teaching but takes a toll on the school as a whole. Practicing self-care is an important activity that will help you cognitively, physically, and emotionally “bounce back” each day over the long term.

Parent Support

Mental Health for Families: Supporting the Mental Health of Families and Caregivers during Distance Learning

A presentation of self-care practices during times of acute and chronic stress for parents/guardians/caregivers. In addition, a resource for parents/guardians/caregivers to help support the children in their home during this time of distance learning.

SIRAS

Introduction to SIRAS for new employees

New Staff will learn the how to maneuver through SIRAS and how to create an IEP in SIRAS.

SIRAS updates

The new features in SIRAS created during the summer 2020 to be reviewed in this one and a half hour training.

Advanced Refresher

The Goal Wizard, Service Logs, and Progress Reports to be reviewed in this one and a half hour training.

SIRAS Updates (February)

Michael Brown, SIRAS Systems, will take staff through procedures of how to conduct Transition Meetings in SIRAS, rolling over data to the next year, electronic signature, and answer questions and answers.

Trauma Informed Practices for Schools

Our schools daily must demonstrate cultural humility and responsiveness to youth and their families. In this training, participants will gain an understanding of trauma and stress on the youth of today and their families. Participants will also examine their own perspectives that they may bring to their work places. Topics of safety and predictability and today's varying family dynamics brought to schools will be discussion points. Participants will explore how to support diverse populations, social emotional learning, and provide resilience.

Crisis and Triage: Supporting a Community of Safety and Welfare for Students (and Staff!)

Participants will gain a functional understanding of basic crisis and triage principles in the contexts of both individual and community support systems, and as they apply to the role educators hold in the lives of youth. Participants will have the opportunity to bolster their crisis response with tools and perspective to support students, colleagues, and themselves.

Conscious Discipline Modules

1. Introduction to Conscious Discipline Modules

Staff will, with a facilitator; watch a series of training modules on Conscious Discipline, an evidence-based, trauma-informed social-emotional learning program, developed by Dr. Becky Bailey. At the end of the module, a facilitated discussion will take place to review the information covered.

Targeted Audience: Any staff supporting a G.R.O.W. (TLP, TLC, STEPS, etc.) Program: Teacher, Mental Health Therapist, School Psychologist, Site Administrator, BCBA, paraprofessional, Program Coordinator, Special Education Director.

2. *Conscious Discipline Modules: “Consequences”*

Staff will, with a facilitator; watch a series of training modules on Conscious Discipline, an evidence-based, trauma-informed social-emotional learning program, developed by Dr. Becky Bailey. At the end of the module, a facilitated discussion will take place to review the information covered.

Targeted Audience: *Any staff supporting a G.R.O.W. (TLP, TLC, STEPS, etc.) program: Teacher, Mental Health Therapist, School Psychologist, Site Administrator, BCBA, paraprofessional, Program Coordinator, Special Education Director.*

3. *Conscious Discipline Modules: “Creating the School Family”*

Staff will, with a facilitator; watch a series of training modules on Conscious Discipline, an evidence-based, trauma-informed social-emotional learning program, developed by Dr. Becky Bailey. At the end of the module, a facilitated discussion will take place to review the information covered.

Targeted Audience: *Any staff supporting a G.R.O.W. (TLP, TLC, STEPS, etc.) program: Teacher, Mental Health Therapist, School Psychologist, Site Administrator, BCBA, paraprofessional, Program Coordinator, Special Education Director.*

4. *Conscious Discipline Modules: “Assertiveness”*

Staff will, with a facilitator; watch a series of training modules on Conscious Discipline, an evidence-based, trauma-informed social-emotional learning program, developed by Dr. Becky Bailey. At the end of the module, a facilitated discussion will take place to review the information covered.

Targeted Audience: *Any staff supporting a G.R.O.W. (TLP, TLC, STEPS, etc.) program: Teacher, Mental Health Therapist, School Psychologist, Site Administrator, BCBA, paraprofessional, Program Coordinator, Special Education Director*

5. *Conscious Discipline Modules: “Choices”*

Staff will, with a facilitator; watch a series of training modules on Conscious Discipline, an evidence-based, trauma-informed social-emotional learning program, developed by Dr. Becky Bailey. At the end of the module, a facilitated discussion will take place to review the information covered.

Targeted Audience: *Any staff supporting a G.R.O.W. (TLP, TLC, STEPS, etc.) program: Teacher, Mental Health Therapist, School Psychologist, Site Administrator, BCBA, paraprofessional, Program Coordinator, Special Education Director.*

6. *Conscious Discipline Modules: “Becoming Brain Smart, Parts 1 and 2”*

Staff will, with a facilitator; watch a series of training modules on Conscious Discipline, an evidence-based, trauma-informed social-emotional learning program, developed by Dr. Becky Bailey. At the end of the module, a facilitated discussion will take place to review the information covered.

Targeted Audience: Any staff supporting a G.R.O.W. (TLP, TLC, STEPS, etc.) program: Teacher, Mental Health Therapist, School Psychologist, Site Administrator, BCBA, paraprofessional, Program Coordinator, Special Education Director.

7. *Conscious Discipline Modules: “Composure”*

Staff will, with a facilitator; watch a series of training modules on Conscious Discipline, an evidence-based, trauma-informed social-emotional learning program, developed by Dr. Becky Bailey. At the end of the module, a facilitated discussion will take place to review the information covered.

Targeted Audience: Any staff supporting a G.R.O.W. (TLP, TLC, STEPS, etc.) program: Teacher, Mental Health Therapist, School Psychologist, Site Administrator, BCBA, paraprofessional, Program Coordinator, Special Education Director.

8. *Conscious Discipline Modules: “Empathy”*

Staff will, with a facilitator; watch a series of training modules on Conscious Discipline, an evidence-based, trauma-informed social-emotional learning program, developed by Dr. Becky Bailey. At the end of the module, a facilitated discussion will take place to review the information covered.

Targeted Audience: Any staff supporting a G.R.O.W. (TLP, TLC, STEPS, etc.) program: Teacher, Mental Health Therapist, School Psychologist, Site Administrator, BCBA, paraprofessional, Program Coordinator, Special Education Director.

9. *Conscious Discipline Modules: “Positive Intent”*

Staff will, with a facilitator; watch a series of training modules on Conscious Discipline, an evidence-based, trauma-informed social-emotional learning program, developed by Dr. Becky Bailey. At the end of the module, a facilitated discussion will take place to review the information covered.

Targeted Audience: Any staff supporting a G.R.O.W. (TLP, TLC, STEPS, etc.) program: Teacher, Mental Health Therapist, School Psychologist, Site Administrator, BCBA, paraprofessional, Program Coordinator, Special Education Director.

10. Conscious Discipline Modules: “Encouragement”

Staff will, with a facilitator; watch a series of training modules on Conscious Discipline, an evidence-based, trauma-informed social-emotional learning program, developed by Dr. Becky Bailey. At the end of the module, a facilitated discussion will take place to review the information covered.

Targeted Audience: Any staff supporting a G.R.O.W. (TLP, TLC, STEPS, etc.) program: Teacher, Mental Health Therapist, School Psychologist, Site Administrator, BCBA, paraprofessional, Program Coordinator, Special Education Director.

LEA Scheduled ‘Mini’ Trainings for 2020/2021

August

Date	LEA	Topic
August 3:	SBCEO	Introduction to SIRAS
August 5:	Guadalupe	Facilitated IEP Meetings
August 8:	Orcutt	Introduction to SIRAS
August 13	Lompoc	Introduction to SIRAS
August 14:	Lompoc	Introduction to SIRAS
August 17:	SBUified	Introduction to SIRAS
August 18:	SBCEO	CPI Refresher
August 18:	Hope	Self-Care for the Educator
August 18:	SYVSEC	Behavioral Foundations for Starting the School Year
August 19:	Hope	Behavior
August 20:	Guadalupe	SIRAS Service Logs and Electronic Signature form
August 24:	Hope	CPI (refresher)
August 25:	SYVSEC	Assuming Positive Intention: What This Is & How to Use Self-Management to Apply It
August 26:	Carpinteria	Moving Forward with Conscious Discipline & Behavior

September

Date	LEA	Topic
September 1	SB PIC Interns	SIRAS Beginners Workshop

October

Date	LEA	Topic
October 5	SMB	SIRAS IEP at a Glance
October 6	Buellton	Understanding Brain States and Coaching Strategies
October 14	SYHS	Understanding Brain States and Coaching Strategies
October 16	Carpinteria	SIRAS Beginners Workshop
October 19	SMB	SIRAS Beginners Workshop
October 21	Manzanita	Understanding Brain States and Coaching Strategies
October 22	SBCEO	SIRAS Beginners Workshop

October 28	SBCEO Youth Empowerment Summit: Relational Scaffolding: Developing Trust-Based Learning Relationships
October 28	Buellton Oak Valley: Cultivating a Positive School Culture and Emotional Well Being
October 28	Buellton Jonata Jr. High School: Cultivating a Positive School Culture and Emotional Well Being
October 28	Functions of Behavior for NPS/A
October 28	Behavior 101 for NPS/A

November

November 2	Orcutt	Accommodations, Modifications, and Grading
November 2	SBUSD	GROW
November 2	Lompoc	SIRAS Beginners Workshop
November 3	Lompoc	GROW
November 4	Hope	GROW Consult/PD
November 5	SBUSD	GROW
November 6	SMBSD	GROW
November 9	SBUSD	GROW
November 10	Lompoc	GROW
November 13	SMJUHSD	GROW
November 13	SBPIC	Relational Scaffolding: Developing Trust-Based Learning Relationships
November 16	SBUSD	GROW
November 17	Lompoc	GROW
November 18	SYV Consortium	GROW
November 18	Lompoc	GROW
November 19	SBUSD	GROW
November 20	SMBSD	GROW

December

December 1:	Lompoc	GROW
December 2:	Lompoc	GROW
December 3:	Lompoc	GROW
December 3:	SBUSD	GROW
December 4:	SMJUHSD	GROW

December 7: SBUSD GROW

December 8: LUSD GROW

January

January 8: SBCEO Transitional Youth Services Program Special Education 101

January 12: Guadalupe Behavior Training

January 13: SYV Consortium Introduction to Conscious Discipline

January 20: SYV Consortium Introduction to Afirm Modules

January 21: SBUSD GROW

January 22: LUSD GROW

January 22: SMBSD GROW

January 26: SMJUHSD GROW

January 26: LUSD GROW

January 27: SYV Consortium First Steps in Teaching Functional Communication Skills

January 27: Hope School District

January 27: LUSD GROW

January 27: SBUSD GROW

January 28: SBUSD GROW

January 28: LUSD GROW

January 29: SBUSD GROW

January 29: SMBSD GROW

February

February 1: Trauma Informed Schools for CAC

February 24: Carpinteria MTSS, Counseling Services and Interventions

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SBCSELPA Executive Director

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Available Resources

OMS Calendar of Events

<https://sbcselpa.k12oms.org/>

Professional Development

SBCSELPA Local Plan

www.sbcselpa.org

Educators, Parent Resources

SBCSELPA Procedural Handbook

www.sbcselpa.org

Educators, Parent Resources

Special Education Parent Handbook

www.sbcselpa.org

Parent Resources

<https://www.sirassystems.org>

What are all these IEP Documents? Parent Questions for an IEP

www.sbcselpa.org

Parent Resources

<https://www.sirassystems.org>

Turning 3: Transition from Early Start to Preschool

www.sbcselpa.org

Parent Resources

<https://www.sirassystems.org>

SIRAS Systems (IEP development)

<https://www.sirassystems.org>

Educators Resources

SBCSELPA YouTube Channel for all trainings

Santa Barbara SBCSELPA Conference Room

bhelt@sbceo.org

To book Santa Barbara SBCSELPA Conference Room

Professional Development Locations for Larger Events

North: Santa Maria Bonita Souza Center: 708 Miller St. Santa Maria, CA 93454

Mid- County: Buellton Recreation Center: 301 2nd St. Buellton, CA 93427

South: SBCSELPA Conference Room: 5385 Hollister Avenue Building 5 Santa Barbara, CA 93111

Zoom Conferencing

This Professional Development Offerings Booklet is updated monthly.

2020-21 LEA/District Cost Associated with Due Process SBCSELPA Account Balances

	Carryover Funding	2020-21 Allocation	Expended to Date 2020-21	Balance
Adelante Charter		\$ 5,804.00		\$ 5,804.00
Blochman		\$ 5,562.00	\$ -	\$ 5,562.00
Carpinteria		\$ 10,725.00	\$ -	\$ 10,725.00
Family Partnership Charter	\$ 10,000.00	\$ 6,005.00	\$ -	\$ 16,005.00
Goleta		\$ 14,768.00	\$ 3,859.00	\$ 10,909.00
Guadalupe		\$ 8,458.00	\$ -	\$ 8,458.00
Hope		\$ 7,503.00	\$ -	\$ 7,503.00
Lompoc		\$ 30,463.00	\$ -	\$ 30,463.00
Manzanita Charter		\$ 6,132.00	\$ -	\$ 6,132.00
Orcutt		\$ 18,585.00	\$ -	\$ 18,585.00
Santa Ynez Valley Consortium		\$ 42,735.00	\$ -	\$ 42,735.00
SBCEO - Direct Service		\$ 16,972.00	\$ -	\$ 16,972.00
Santa Barbara Unified		\$ 41,903.00	\$ -	\$ 41,903.00
Santa Barbara Charter		\$ 5,762.00	\$ -	\$ 5,762.00
Santa Maria JUHSD	\$ 20,580.46	\$ 27,912.00	\$ 29,175.00	\$ 19,317.46
Santa Maria-Bonita	\$ 89,672.23	\$ 50,711.00	\$ -	\$ 140,383.23
TOTAL	\$ 120,252.69	\$ 300,000.00	\$ 33,034.00	\$ 387,218.69

Total balances as of 3/1/21

\$ 33,034.00	\$ 387,218.69
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Total balances reported 2/1/21

\$ 33,034.00	\$ 387,218.69
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Difference as of 2/1/21

\$0.00	\$0.00
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Payments to date to individual legal firms:

Dannis Woliver	\$	-
Fagen Friedman Fulfro	\$	-
Leibert Cassidy	\$	-
Hatch & Cesario	\$	3,859.00
Lozano Smith	\$	-
Peter Sansom	\$	-
Ruderman & Knox	\$	-
SISC Voluntary Coverage	\$	-
Reimbursements to Districts	\$	29,175.00

2020-21
YEAR TO DATE SELPA LEGAL FEES (RESERVE)

Beginning Balance \$ 325,000.00
 YTD Expenditures

July	\$ -
August	\$ -
September	\$ 700.00
October	\$ -
November	\$ 105.00
December	\$ 3,747.50
January	\$ 2,742.50
February	\$ -
March	\$ -
April	\$ -
May	\$ -
June	\$ -

TOTAL \$ 7,295.00

ENDING BALANCE \$ 317,705.00

Payments to Law Firms:

Dannis Woliver Kelley	\$ -
Fagen Friedman Fulfroost	\$ 2,765.00
Law Office of Melissa Hatch	\$ 1,530.00
Liebert Cassidy Whitmore	\$ -
Lozano Smith	\$ -
Musick, Peeler & Garrett	\$ -
Lana Clark	\$ -
Atkinson, Andelson, Loya	\$ -
Payments to Districts	\$ 3,000.00

TOTAL 2020-21 LEGAL SETTLEMENTS TO DATE

Settlement Agreements \$ 200.00

2020-21 Year to Date Nonpublic School Placement Costs

District	# Students Currently Placed	# Students Cumulative Placements	Mental Health Placements Total SELPA Paid	Non-Mental Health Placements SELPA 70% Cost	District Estimated Offset to SELPA Cost	Total Estimated Cost
Lompoc Unified - Mental Health Placement	1	1	\$ 81,728.00		\$ 105,774.50	\$ 167,289.00
Santa Barbara Unified - Mental Health Placements	1	3	\$ 242,316.31		\$ 227,087.50	\$ 511,213.00
Santa Maria Jt. Union - Mental Health Placements	2	2	\$ 199,196.00		\$ 128,595.50	\$ 408,558.00
Santa Ynez Valley Consortium - Mental Health Placements	1	1	\$ 39,292.21		\$ 91,224.00	\$ 171,800.00
TOTAL	5	7	\$ 562,532.52	\$ -	\$ 552,681.50	\$ 1,258,860.00
2020-21 Mental Health NPS Placement Budget			\$ 1,910,000.00			
TOTAL YTD Mental Health Placement Costs			\$ 562,532.52			
Less District Estimated Offset to SELPA Costs			\$ 552,681.50			
Balance Available			\$ 1,900,148.98			
2020-21 Non Mental Health NPS Placement Budget			\$ 360,000.00			
TOTAL YTD Non Mental Health Placement Costs			\$ -			
Balance Available			\$ 360,000.00			

Mental Health Placements = Students with an eligibility of emotionally disturbed placed in a nonpublic school pursuant to an IEP and funded by State Mental Health funding.

Non-Mental Health Placements - Students in these placements are fully paid by the SELPA office with 30% of the costs being billed back to the district at year-end. These are placements that are made through Settlement Agreements for students who do not qualify for Clinical Mental Health services.

Reflects all invoices paid as of 1/26/21