

# SANTA BARBARA COUNTY SELPA JOINT POWERS AGENCY BOARD

## Regular Meeting

**Monday, December 4, 2023**

Public Session – 12:00 p.m.

Jonata Middle School Library

301 Second Street, Buellton, CA 93427

## 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 comments to 30 minutes. People 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 acting 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.

Forms are available from the Board's secretary for requests to address the Board. People wishing to make public comments are requested to complete the appropriate form and return it to the Board Secretary.

### **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 November 6, 2023 Regular Meeting REF: V-A
- B. Ratification of Payment Claims REF: V-B
- C. 2023-2024 School Psychologist Internship Placement Agreement:  
Orcutt Union School District REF: V-C
- D. Santa Barbara Education Office (SBCEO) School Business Advisory Services  
(SBAS) Annual Organizational Meeting and Authorized Signatures Request REF: V-D
1. Authorized Signature Forms

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

Motion: \_\_\_\_\_  
 Second: \_\_\_\_\_  
 In Favor: \_\_\_\_\_  
 Opposed: \_\_\_\_\_  
 Abstained: \_\_\_\_\_

**VI. PRESENTATION**

- A. First Interim Report for Fiscal Year 2023-2024 Presentation REF: VI-A  
 Presenter: Rachel Wigle, SBCSELPA Chief Business Official

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

- A. Certification of First Period Interim Report for Fiscal Year 2023-2024 REF: VII-A
1. Narrative and Chart of First Period Interim Revenues and Expenses.
  2. First Period Interim Report

It is recommended that the JPA Board approve the First Period Interim Report for Fiscal Year 2023-2024 as presented.

Motion: \_\_\_\_\_  
 Second: \_\_\_\_\_  
 In Favor: \_\_\_\_\_  
 Opposed: \_\_\_\_\_  
 Abstained: \_\_\_\_\_

- B. SBCSELPA Local Plan Revision, Section 9, Part XVII, Out-of-Home Care REF: VII-B  
*(Second Reading/Approval)*
1. Local Plan revisions

It is recommended that the JPA Board approve the revisions to the Local Plan, Section 9, Part XVII, Out-of-Home Care as presented.

Motion: \_\_\_\_\_  
 Second: \_\_\_\_\_  
 In Favor: \_\_\_\_\_  
 Opposed: \_\_\_\_\_  
 Abstained: \_\_\_\_\_

**VIII. ITEMS SCHEDULED FOR INFORMATION AND DISCUSSION**

- A. 2023-24 Regional Programs Update REF: VIII-A
- B. 2024 SELPA-Bratton Announcement REF: VIII-B
- **Voting Ballot Link:**  
<https://www.trainingcheck.com/live/TakeSurvey.aspx?SurveyID=92KL77m602&lid=0>

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

- C. SBCSELPA Funding Model Ad Hoc Committee Update & Recommendations REF: VIII-C
1. Funding Model Committee Members and Goals
  2. SBCSELPA Funding Model Committee Meeting Notes, Tuesday, November 14, 2023 & Attached Presentation
- D. Turning 3 Years Old, Transition from Early Start into Preschool Years Booklet Revisions/Updates, Created By: Alpha Resource, SBCEO, & SBCSELPA REF: VIII-D
1. Turning 3 Booklet with No Markups
  2. Turning 3 Booklet with Markups
- E. SBCSELPA “Winter Break” Closure REF: VIII-E
- F. Resignation Notification from Tina Kurrels, SBCSELPA Bilingual WRAP Facilitator REF: VIII-F
1. Resignation Letter
- G. SBCSELPA Professional Development REF: VIII-G
1. SBCSELPA 23-24 Professional Development Offerings Booklet (Updated November 2023) - [Professional Development Booklet 2023-2024](#)
- H. LEA/District Costs Associated with Due Process – SBCSELPA Year-to-Date Account Balances REF: VIII-H
- I. SBCSELPA Legal Fees Year-to-Date Reserve REF: VIII-I
- J. Nonpublic School (NPS) Year-to-Date Placement Expenditures REF: VIII-J

**IX. MISCELLANEOUS AGENDA ITEMS**

- A. Items Proposed for Future Action or Discussion
- B. Next Scheduled JPA Board Meeting: Date: **February 5, 2024**  
Time: **12:00 p.m.**  
Location: **Jonata Middle School Library**
- C. **REMINDER: A JPA Board Special meeting will need to be scheduled for January 2024 to address the following upcoming agenda items:**
1. Audit Update

**X. PUBLIC COMMENT PERIOD REGARDING CLOSED SESSION ITEMS**

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

**XI. CLOSED SESSION**

- A. **Liability Claims: (Gov. Code § 54954.5(d))**  
**Claimant:** Goleta Union School District  
**Agency Claimed Against:** Santa Barbara County SELPA

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

## SBCSELPA EXECUTIVE DIRECTOR'S REPORT TO JPA BOARD

### December 4, 2023

#### 1) Due Process/Dispute Updates –

*There are zero (0) Due Process filings in progress and four (4) CDE Investigations.*

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

*We have a total of six (6) SBCSELPA funded NPS placements.*

#### 3) CDE Compliance Monitoring Update –

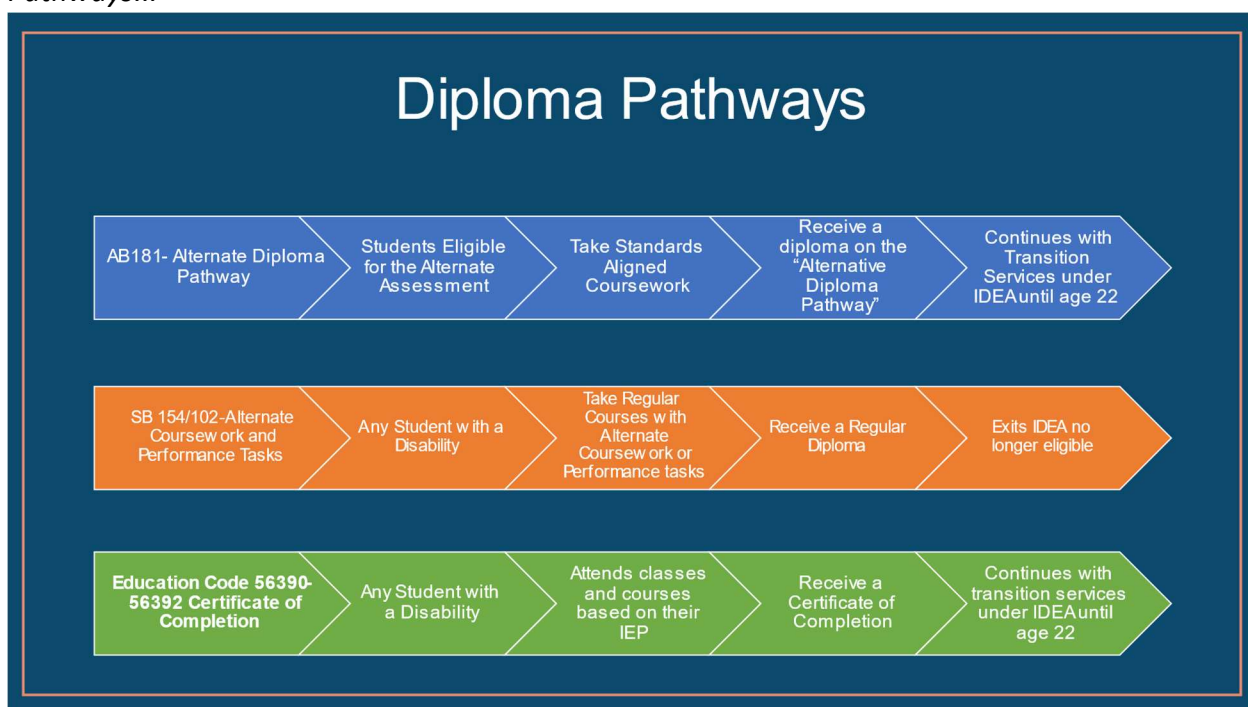
*CDE has provided an update on Compliance Monitoring with updated timelines and new data for Performance Indicators (SEE attached presentation titled, “Annual Performance Report and the Monitoring Impacts” – REF: I-E.1). This information will be shared with the SB County Special Education Administrators (SEAM) on December 15, 2023, in preparation of compliance monitoring progress for the remainder of this school year.*

#### 4) Legislative Update –

*The State SELPA Legislative Committee approved a motion at their last meeting to draft proposed legislation to change the special education eligibility terminology from “Emotional Disturbance” to “Emotional Disability”. The committee (which includes the SBCSELPA Executive Director) will next secure a legislator to author this proposed legislation.*

#### 5) AB 181 “Alternative Diploma Pathway” and SB 154 “Alternate Coursework” –

*The California Department of Education recently shared a graphic that explains Diploma Pathways...*





## 6) Legal “Hot Topics” Presentation –

SBCSELPA recently brought in Jan Tomsy, attorney with F3 law firm, to present on a variety of legal hot topics **(SEE attached presentation titled, “Hot Topics in Special Education” – REF: I-E.2).** There were over 50 participants in attendance! Topics highlighted were:

- Restraint and Seclusion
- Alternative Pathway for the Diploma (Revisited)
- Larry P
- Transportation

The “Larry P” topic of future assessment practices for our AA student population continues to be presented and discussed statewide **(SEE attached presentation titled, “Separate But Substantially Equivalent: Larry P. in 2023” – REF: I-E.3).** Jan Tomsy advised the participants attending her presentation to “stand down” and continue with past assessment practices. More to come!

## 7) State SELPA Association “SEEDS” Committee Scholars Recipients –

The State SELPA Association “SEEDS” committee provides professional development opportunities statewide and receives revenues for some of the training implemented. The SEEDS committee decided to use a percentage of the revenues in the form of a scholarship to be provided to programs that serve and support our students with IEP’s at the college level on an annual basis. Recently, the UC Davis Redwood program was honored. The UC and Cal State universities are increasing the numbers of these amazing programs!

# UC Davis Redwood SEEDS Scholars

Elizabeth Engelken, Chair, Aaron Benton, SEEDS Committee Co Chair, and Patrick McGrew, Yolo County SELPA, had the honor of presenting our first monetary donation to the **UC Davis Redwood SEEDS Scholars** on Wednesday, November 29th at the UC Davis Jan Shrem and Maria Manetti Shrem Museum of Art.





# Annual Performance Report and the Monitoring Impacts

Federal Fiscal Year 2022

Shiyloh Duncan-Becerril, Associate Director  
Special Education Division

**CALIFORNIA DEPARTMENT OF EDUCATION**

Tony Thurmond, State Superintendent of Public Instruction

# Compliance Indicators

Indicators	Target	Results	Met Target	Change	Data Year
4B. Suspension & Expulsion Rate by Race/Ethnicity	0%	Not Available	Not Available	Not Available	2021-2022
9. Disproportionate Representation	0%	Not Available	Not Available	Not Available	2022-2023
10. Disproportionate Representation by Disability Category	0%	Not Available	Not Available	Not Available	2022-2023
11. Child Find	100%	94.03%	No	+0.04%	2022-2023
12. Early Childhood Transition	100%	76.09%	No	-2.06%	2022-2023
13. Secondary Transition	100%	95.25%	No	+0.36%	2022-2023

# Warning System

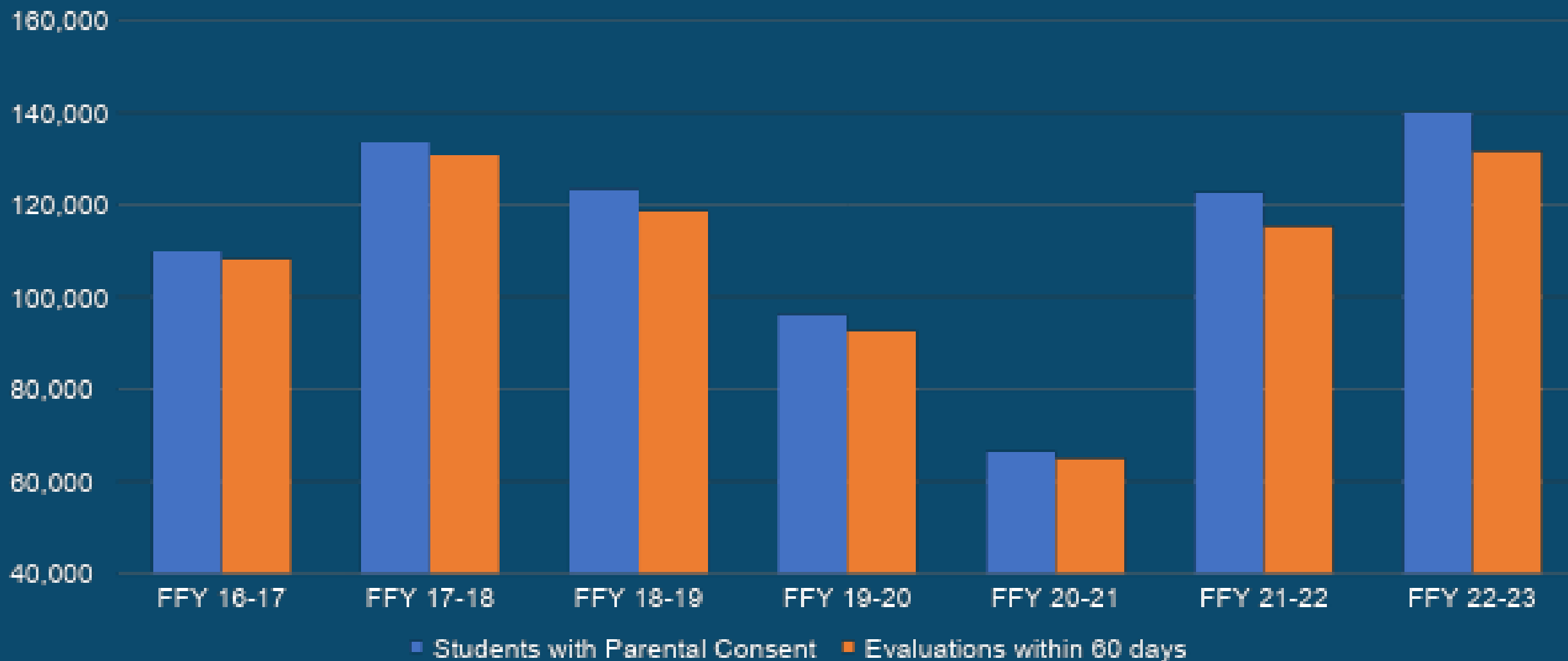
Disproportionality is the early warning system for Significant Disproportionality.



# Indicator 11: Child Find

- 2022 Target: One hundred percent of children are evaluated within 60 days of receiving parental consent.
- 2022 Result: 94.03 percent
- 2021 Result: 93.99 percent
- Change: +0.04
- Target Met: No

# Indicator 11: Child Find

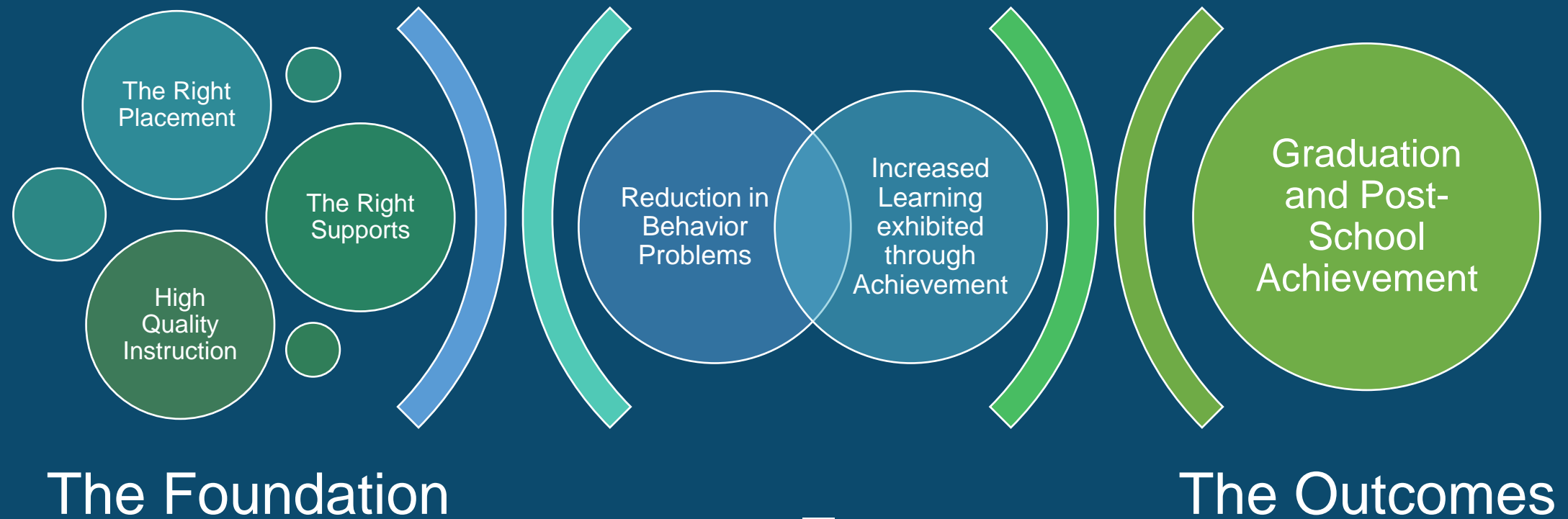


# Overview of the Performance Indicators





# LRE is the Foundation of CDE's Theory of Action for Improvement in Outcomes for Students with Disabilities



# Performance Indicators

Indicators	Target	Results	Met Target	Change	Data Year
1. Graduation	76%	82.98%	Yes	+5.62%	2021-2022
2. Dropout	9%	10.04%	No	-2.83%	2021-2022
3. Statewide Assessment 3a. Participation 3b. Grade Level Assessments Proficiency 3c. Alternate Assessment Proficiency 3d. Achievement Gap	3a. 95% ELA & Math 3b. Various 3c. Various 3d. Various	Not Available	Not Available	Not Available	2022-2023
4.Suspension/Expulsion 4a. Suspension/Expulsion Rate Overall	2.6%	0.67%	Yes	+0.67%	2021-2022
5. Education Environments 5a. Regular class 80 percent or more 5b. Regular class less than 40 percent 5c. Separate schools, residential facilities, or homebound/hospital placements	5a. 62% 5b. 16.5% 5c. 3.0%	5a. 61.3% 5b. 18.38% 5c. 2.54%	5a. No 5b. No 5c. Yes	5a. +0.48% 5b. -0.22% 5c. -0.03%	2022-2023
6. Preschool Least Restrictive Environment 6a. Regular Preschool 6b. Separate schools or classes 6c. Home Setting	6a. 43% 6b. 29% 6c. 3.5%	6a. 19.86% 6b. 47.48% 6c. 5.64%	6a. No 6b. No 6c. No	6a. +1.0% 6b. -0.39% 6c. -2.33%	2022-2023

# Performance Indicators Continued

Indicators	Target	Results	Met Target	Change	Data Year
7. Preschool Assessment 7a. (1 and 2) 7b. (1 and 2) 7c. (1 and 2)	7a. 78% / 78% 7b. 78% / 78% 7c. 78% / 78%	Not Available	Not Available	Not Available	2022-2023
8. Parent Involvement	96%	99.67%	Yes	+0.04%	2022-2023
14. Post School Outcomes 14a. Enrolled in higher education 14b. Enrolled in higher education or competitively employed with a year 14c. Enrolled in higher education, postsecondary education, training, or competitively employed	14a. 57% 14b. 78% 14c. 88%	14a. 50.81% 14b. 75.06% 14c. 90.46%	14a. No 14b. No 14c. Yes	14a. +2.88% 14b. +0.53% 14c. -0.66%	2022-2023
15. Resolution Session	42%	5.38%%	No	-2.80%	2022-2023
16. Mediation	67%	9.15%	No	-7.77%	2022-2023
17. State Systemic Improvement Plan	15%	Not Available	Not Available	Not Available	2022-2023

# Indicator 6: Preschool Least Restrictive Environment

- Measures the percent of children with disabilities ages three through five years, enrolled in a preschool program attending a regular early childhood program and receiving the majority of special education and related service in the regular early childhood program; and separate special education class, separate school, or residential facility; and receiving special education and related services in the home.
  - 6a. 43 percent.
  - 6b. 29 percent.
  - 6c. 3.5 percent.
- 2022 Result: 6a: 19.86 percent 6b: 47.48 percent 6c: 5.64 percent
- 2021 Result: 6a: 18.86 percent 6b: 47.87 percent 6c: 7.97 percent
- Change: 6a: +1.0 6b: -0.39 6c: -2.33
- Target Met: No

# Prekindergarten Investments

- Children with an IEP or an Individualized Family Service Plan will be categorically eligible for CSPP
- New phased-in requirement for CSPP to reserve enrollment for a certain percent of children
- \$2 million to incorporate early identification for learning disabilities into the state's preschool assessment tools

# Indicator 5: Least Restrictive Environment

- Measures the percent of students with disabilities, aged 5 who are enrolled in Kindergarten, and aged six to twenty-two, served inside the regular class 80 percent or more of the day; inside the regular class less than 40 percent of the day; and served in public or private separate schools, residential facilities, or homebound/hospital placement.
  - 5a Target: 62 percent.
  - 5b Target: 16.5 percent.
  - 5c Target: 3.0 percent.
- 2022 Result: 5a: 61.30 percent 5b: 18.38 percent 5c: 2.54 percent
- 2021 Result: 5a: 60.82 percent 5b: 18.60 percent 5c: 2.57 percent
- Change: 5a: +0.48 5b: -0.225c: -0.03
- Target Met: No/Yes

# Indicator 4A: Suspension & Expulsion

- 2022 Target: No more than 2.6 percent of LEAs will have rates of suspension and expulsions of students with disabilities for greater than 10 days in a school year. This indicator uses lag year data.
- 2022 Result: 0.67 percent
- 2021 Result: 0 percent
- Change: +0.67
- Target Met: No



# Indicator 1: Graduation

- 2022 Target: 76 percent of youth with IEPs will exit special education due to graduating with a regular high school diploma.
- 2022 Result: 82.98 percent
- 2021 Result: 77.36 percent
- Change: +5.62
- Target Met: Yes

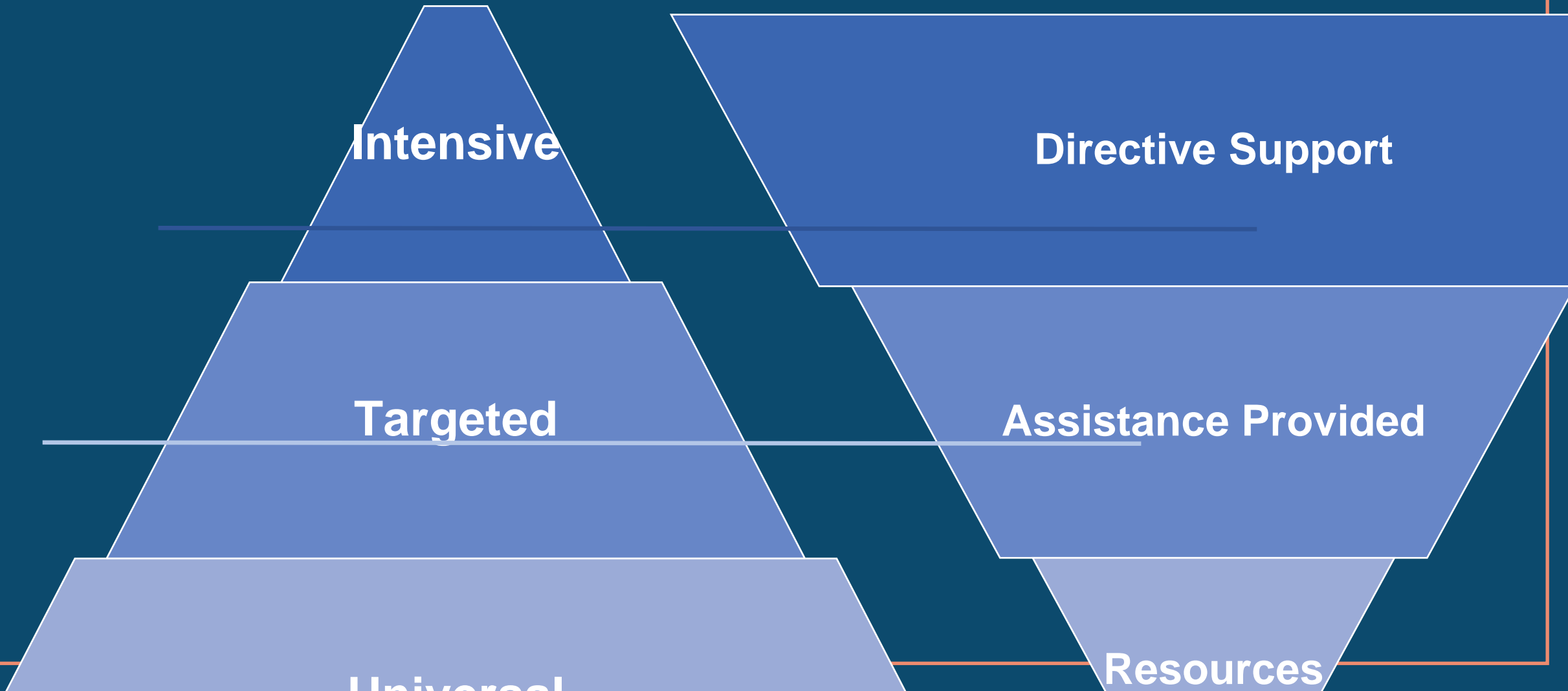
# How does this impact monitoring?



# How do Non-Small LEAs get into the Tiers?



# So what does that look like in Monitoring?



# How does System of Support help LEAs?

23

Year 1

Data, Root Cause and Investigative Technical Assistance  
(SELPA, SIL, SPP-TAP, CDE)

Creating plans that address a one  
problem of practice  
(SIL, SIP, Some Content Leads)

Step 1 Gather and  
Inquiry

- What is occurring?

Step 2-Investigate

- Why is this happening?

Step 3-Plan

- How can we address it?

Year 2

Individual tasks like training and PD  
(Content leads, EWIG, COEs, other SOS Leads)

Step 4-  
Implementing the  
tasks of the plan



Implementation  
updates with  
CDE



Review local  
data



Update Plan

Year 3

Identifying and addressing barriers  
(SIL, SIP, SPP-TAP, CDE)

# Monitoring Year 2024

## Annual Determination

- March 2024

## Step 2

- August-October

## Step 1

- April-June

## Step 3

- November-December



# Monitoring Year 2025

## Annual Determination

- January 2025

## Step 2

- August-October

## Step 1

- February-May

## Step 3

- November-December





# Questions?

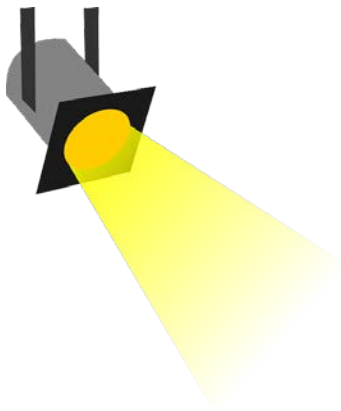


Fagen Friedman & Fulfroft LLP

# HOT TOPICS IN SPECIAL EDUCATION



Santa Barbara County SELPA  
November 8, 2023  
Jan E. Tomskey



# What We'll Focus On. . . .

- Restraint and Seclusion
- Alternative Pathway for the Diploma (Revisited)
- Larry P
- Transportation
- LRE (Redondo Beach decision)



# Restraint and Seclusion



# Background and Current Issues

- GAO Report (2009): Hundreds of cases of alleged abuse and death from restraint and seclusion, including:
  - Students tied down
  - Mouths taped shut
  - Locked in small spaces for extended periods of time
  - Being crushed by a teacher

(U.S. Government Accountability Office, Seclusion and Restraint: Selected Cases of Death and Abuse at Public and Private Schools and Treatment Centers (May 19, 2009))



# Background and Current Issues

- (Former) Secretary of Education Arne Duncan:
  - GAO report and hearing was deeply troubling
  - Called upon all states to review policies regarding restraint and seclusion
- However, U.S. Department of Education has issued only limited guidance
  - USDOE: “Resource Document” (2012)
  - OCR: “Dear Colleague” Letter (2016)
  - OSERS: “Questions and Answers: Addressing the Needs of Children with Disabilities and IDEA’s Discipline Provisions” (2022)



# USDOE: 2012 Resource Document<sup>32</sup>

- Not legally binding, but often cited in OCR and state compliance complaint investigations
- “Restraint or seclusion should never be used except in situations where a child’s behavior poses imminent danger of serious physical harm to self or others, and restraint and seclusion should be avoided to the greatest extent possible without endangering the safety of students and staff”





# USDOE: 2012 Resource Document<sup>33</sup>

Adopted following definitions:

## **“Physical restraint”**

- A personal restriction that immobilizes or reduces the ability of a student to move his or her torso, arms, legs, or head freely
  - The term does not include a physical escort
  - Physical escort means a temporary touching or holding of the hand, wrist, arm, shoulder, or back for the purpose of inducing a student who is acting out to walk to a safe location



# USDOE: 2012 Resource Document<sup>34</sup>

Adopted following definitions:

## **"Mechanical restraint"**

- Use of any device or equipment to restrict a student's freedom of movement
  - The term does not include devices implemented by trained school personnel, or utilized by a student that have been prescribed by an appropriate medical or related services professional and are used for the specific and approved purposes for which such devices were designed (e.g., supports to achieve proper body position, vehicle safety restraints, restraints for medical immobilization, orthopedic devices)



# USDOE: 2012 Resource Document<sup>35</sup>

Adopted following definitions:

## **"Seclusion"**

- The involuntary confinement of a student alone in a room or area from which the student is physically prevented from leaving
  - The term does not include a "timeout," which is a behavior management technique that is part of an approved program, involves the monitored separation of the student in a non-locked setting, and is implemented for the purpose of calming



# USDOE: 2012 Resource Document<sup>36</sup>

- Identified 15 principles that states, local school districts, parents, and other stakeholders should consider as the framework for developing and implementing policies and procedures

(Restraint and Seclusion: Resource Document (2012)

[www2.ed.gov/policy/seclusion/restraints-and-seclusion-resources.pdf](http://www2.ed.gov/policy/seclusion/restraints-and-seclusion-resources.pdf))



# Background and Current Issues

- USDOE “Civil Rights Data Collection” (2018)
  - During 2015-2016 school year, students with disabilities represented 71 percent of all students who were restrained and 66 percent of all students who were secluded, even though they made up just 12 percent of the overall student population



# Background and Current Issues

In 2019, OCR began conducting district-level restraint and seclusion compliance reviews

- Identifying districts for review based on information, including reported data, news reports, as well as information from students, parents, advocacy groups, and community organizations



# California Law: Summary

- California special education law, like the IDEA, does not prohibit use of restraint or seclusion, in general
- However, certain types of behavior interventions are specifically prohibited
- Some exceptions allowed for emergency interventions



# California Law

- Prohibited interventions (districts serving students with exceptional needs cannot “authorize, order, consent to, or pay for” the following):
  - Intervention designed to or likely to cause physical pain, including but not limited to, electric shock
  - Intervention that involves release of noxious, toxic or unpleasant substance/mist/spray near face
  - Intervention that denies adequate sleep, food, water, bedding, shelter, comfort, or access to bathroom facilities
  - Intervention designed to or likely to subject the individual to verbal abuse, ridicule, humiliation or cause excessive emotional trauma . . . (cont'd)





# California Law (cont'd)

- ❑ Intervention employing device that immobilizes all four extremities (except that prone containment may be used by trained personnel as limited emergency intervention)
- ❑ Locked seclusion, unless it is in facility licensed or permitted by state law to use a locked room
- ❑ Intervention that precludes adequate supervision
- ❑ Intervention that deprives individual of one or more of his or her senses

(Ed. Code, § 56521.2)



# Emergency Interventions

- Emergency interventions may only be used only to control unpredictable, spontaneous behavior that:
  - Poses clear and present danger of serious physical harm to student or others, and
  - Cannot be immediately prevented by response that is less restrictive
- May not be used as substitute for systematic behavior plan designed to change, replace, modify, or eliminate a targeted behavior

(Ed. Code, § 56521.1)



# Emergency Interventions – Duration and Force

- **Duration:** Cannot employ emergency intervention for longer than is necessary to contain behavior
- **Force:** Amount of force used in emergency intervention must be reasonable and necessary under specific circumstances

(Ed. Code, § 56521.1)



# Prohibited Emergency Interventions

- Locked seclusion, unless it is in facility licensed or permitted to use a locked room
- Intervention employing device that immobilizes all four extremities (except that prone containment may be used by trained personnel as limited emergency intervention)
- An amount of force that exceeds that which is reasonable and necessary under the circumstances

(Ed. Code, § 56521.1)



# Emergency Interventions – Notice and Reporting

- Districts must notify parents/guardians within one school day if emergency intervention is used or serious property damage occurs
- Behavioral emergency report (“BER”) should be completed immediately, reviewed by designated administrator and maintained in student’s file
- If BER is written for student without a BIP, IEP meeting must be scheduled within two days to determine need for FBA and interim BIP

(Ed. Code, § 56521.1)





# Emergency Interventions – Notice and Reporting

- If BER is written for student with a BIP, the incident involves a previously unseen serious behavior problem, or a previously designed intervention is ineffective, BER shall be referred to the IEP team to review and determine if incident constitutes a need to modify the BIP

(Ed. Code, § 56521.1)



# AB 2657

- Became effective January 1, 2019
- Applies to all students
  - But does not change any requirements, limitations, or protections contained in existing law pertaining to students with disabilities
- Allows for use of behavioral restraints – including physical and mechanical restraints, or seclusion – only to control behavior that poses clear and present danger of serious physical harm to student or others that cannot be immediately prevented by response that is less restrictive
- Mechanical and physical restraint does not include use of devices or force by peace officers or security personnel



# AB 2657 (cont'd)

## ■ Prohibits:

- Seclusion or a behavioral restraint for the purpose of coercion, discipline, convenience or retaliation
- Any technique that may restrain student's airway or breathing
- Placing student in facedown position with hands held or restrained behind back
- Locked seclusion, unless in facility otherwise licensed or permitted by state law, and educational provider can make constant, direct eye contact with student

## ■ Requires districts to collect and report annually to CDE data on number of times and number of students on which restraints and seclusion were used

- Data must be disaggregated for students who have Section 504 plans, students who have IEPs, and students who do not have either





# Recent Case Examples



# FAPE Claims – Example #1

## Oxnard School Dist. (OAH 2018)

- Parent did not prove that District used improper seclusion and restraint as a behavior intervention for 8-year-old Student
- Student's behavior was extreme, violent, unpredictable and uncontrollable
- Staff was properly trained to use reasonable restraint and seclusion to protect Student, and others, from physical harm
- Restraint was used only to extent necessary and only for amount of time required under circumstances

(Student v. Oxnard School Dist. (OAH 2018) Case No. 2018080844, 119 LRP 322)



# FAPE Claims – Example #2

## Hermosa Beach City School Dist. (OAH 2018)

### Facts and Decision:

- District placed 16-year-old Student in SDC at NPS
- Student left NPS due to fear/anxiety about attending school
- Parent later discovered NPS used physical transport holds on Student
  - Parent alleged improper use of behavior interventions that caused emotional trauma
- ALJ: NPS staff violated Ed Code by failing to report use of emergency interventions
- District's IEP team should have developed less intrusive and more effective techniques to address Student's predictable maladaptive behaviors
- But no direct evidence that emergency interventions caused Student trauma
- ALJ awarded compensatory education

(Student v. Hermosa Beach City School Dist. (OAH 2018) Case No. 2017060038, 118 LRP 12982)



# FAPE Claims – Example #3

## Santa Monica-Malibu Unif. School Dist. (OAH 2020)

### Facts and Decision:

- District developed several positive behavioral support plans for 9-year-old with autism to address aggressive and self-injurious behaviors
  - Plans did not provide for holds, restraints or any aversive behavioral techniques
- Student's paraprofessional aide used restraints and aversive techniques on bus (physical contact, harnessing), as well as in classroom
- ALJ: District denied Student FAPE by materially failing to implement Student's positive behavior support plans
- Aide did not follow any plan protocols and used "pain, trauma and fear to gain compliance"

(Student v. Santa Monica-Malibu Unif. School Dist. (OAH 2020) Case No. 2019090404, 120 LRP 8398)



# Practical Pointers



# Practical Pointers and Take-Aways

- Staff training: Ensure teachers, paraprofessionals, teaching assistants and other staff (even those not authorized to use restraint or seclusion) receive training on what actions constitute methods of restraint and seclusion under California law and district policy so they do not unlawfully use them
- "Red-flag" to re-examine behavior strategies: Multiple uses of restraint or seclusion should trigger a review and, if appropriate, revision of strategies currently in place to address student's behavior; if positive behavioral strategies are not in place, consider developing them



# Practical Pointers and Take-Aways<sup>55</sup>

- Complete and comprehensive records: Documenting details of each instance of restraint and seclusion is essential for compliance with California reporting requirements and to assist IEP team in working to develop and refine effective behavior interventions
- NPS placements: Because district continues to be responsible for student's safety and well-being, it must regularly monitor each NPS to ensure continued compliance



# Practical Pointers and Take-Aways<sup>56</sup>

- Monitor for violations: If district personnel suspect that improper restraint or seclusion practices have been used, commence investigation ASAP
  - Possible consequences for noncompliance include: CDE-ordered corrective actions; finding of denial of FAPE (reimbursement and/or compensatory education); violation of the student's civil rights; criminal prosecution; civil liability





# Alternative Pathway to a Diploma



# CAHSEE

- California High School Exit Exam
- In the years prior to 1999, IEP teams were legally empowered to modify requirements and award diplomas to student with disabilities
- In 1999, the California legislature voted to create the CAHSEE, and IEP teams lost their authority to modify diploma requirements



# CAHSEE

- The intent of the exam, required to earn a diploma, was to improve the academic performance of all students, and ensure that a diploma was meaningful
- Intended to be effective with the class of 2004, delayed to 2006
- Due to significant concerns regarding passage rates—particularly for students with disabilities—the exam was suspended in 2015 and ultimately abandoned



# DIPLOMA

- In 2020, the Budget Act created the Alternative Pathways to a High School Diploma
- The Workgroup issued a report in October 2021
- Articulated a “common, foundational vision” that **all** students should enter high school knowing they have the opportunity to earn a high school diploma



# DIPLOMA

- At that time, however, recommended creating only one new pathway to a high school diploma, for students with the most significant cognitive disabilities
- AB 181 was consequently passed, enacting Education Code section 51225.31, effective June 30, 2022
- Section 51225.31 was amended by SB 114, effective July 10, 2023



# DIPLOMA

- References ESSA's accountability provisions, that describe a state-defined alternative diploma for students taking alternative assessments
- References IDEA: Does not terminate eligibility



# DIPLOMA: ELIGIBILITY

- Student's IEP team must deem the student eligible to take the California Alternative Assessment – a high stakes decision!
- Student must complete “state standards aligned coursework” meeting the California statewide minimum coursework requirements in Ed. Code 51225.3
  - Student is exempt from courses and local requirements



# DIPLOMA: ELIGIBILITY

- Student must have entered 9<sup>th</sup> grade in the 2022-2023 school year or later
- Student's IEP team determines whether a student may be eligible to graduate with a diploma through the alternative pathway
- Student on this pathway is eligible to participate in graduation ceremonies and activities with their grade-level peers





# DIPLOMA

- Student then is awarded a “diploma of graduation from high school”



# GUIDANCE FROM CDE

- CDE issued an Official Letter addressing the “New Pathway” on August 25, 2023
- Some quotes:
  - “LEAs should be offering this pathway for all students who qualify.”
  - “If LEAs have questions about the implications of [the new pathway] on local programs or specific circumstances...seek local counsel.”



# GUIDANCE FROM CDE

- One more quote:

- "Through the completion of the statewide coursework requirements, the LEA must award the qualifying student a diploma of graduation from high school."

CDE is silent on what the coursework must or will look like, despite the provision in federal law requiring that the coursework aligned with state requirements be **state-defined**



# DIPLOMA

## STATE STANDARDS ALIGNED COURSEWORK

- Recall that ESSA states that the requirements for the diploma must be “state-defined”
- The Workgroup noted that “[a]s implied by its name, the state-defined alternative diploma must also be defined at the state level”



# DIPLOMA

## STATE STANDARDS ALIGNED COURSEWORK

- CDE's guidance says nothing more than students must complete the coursework identified in the Education Code
- If LEAs locally identify coursework considered to be state standards aligned, is that consistent with the requirement that the diploma must be state-defined (since requirements will vary LEA by LEA)?



# DIPLOMA

- Many questions remain unanswered
- Going forward, IDEA funds have been earmarked to identify to address options for student not eligible for the CAA, but who struggle to meet graduation requirements



# QUESTIONS TO PONDER

- Despite no real guidance and direction from the state, and no state-approved alternative curriculum, shall we move forward to design appropriate curriculum locally? At the LEA level? County? State?
- What options might we consider?
  - Inclusion?
  - Co-taught classes?
  - Re-defining SDC curriculum to align with state-required coursework for the diploma?



# QUESTIONS TO PONDER

- What impact might this have on post-secondary transition programming?
- Will we need to revise applicable Board policies and regulations? (hint: yes)
- What will a transcript look like for a student achieving this diploma?





# Transportation



# Eligibility: Legal Overview

- IEP team decides whether student requires transportation as a related service
- Decision must be based exclusively upon individualized needs of student for some form of transportation
  - Not based upon geographic boundaries of district or other considerations, such as to accommodate parent's convenience/preference

(Ed. Code, § 56342, subd. (a); 71 Fed. Reg. 46576 (Aug. 14, 2006); Alamo Heights Indep. School Dist. v. State Bd. of Educ. (5th Cir. 1986) 790 F.2d 115334



# Eligibility: Legal Overview

- If IEP team determines that student needs transportation to receive FAPE, transportation and supports must be provided at no cost to the parents
- 9th Circuit has not specified criteria for determining when student needs transportation as a related service

(71 Fed. Reg. 46576 (Aug. 14, 2006))



# Eligibility: Legal Overview

- OAH has cited to cases from other circuits that have listed factors to consider
  - Medical/health needs
  - Accessibility of curbs, sidewalks, etc.
  - Student's age, cognitive ability, adaptive behavior, and/or communication skills
  - Behavior plans during transport
  - Distance/duration of ride
  - Nature of areas traveling through
  - Other public assistance in route

(See, e.g., Donald B. v. Board of School Commissioners of Mobile County (11th Cir. 1997))



# Eligibility: Legal Overview

- No IDEA requirement for formal, separate transportation assessment
- But OSEP and case law recognize affirmative obligation to assess student's needs prior to making transportation eligibility determination (i.e., transportation should be discussed during assessment process)

(Letter to Smith (OSEP 1995) 23 IDELR 344; see also, Student v. Los Angeles Unified School Dist. (OAH 2013) Case No. 2013071293)



# Eligibility: Case Example #1

## San Bruno Park Unified School Dist. (2016)

- District did not offer transportation to 6-year-old with autism who was placed at school of residence
- ALJ upheld IEP team decision
- District policy did not provide for transportation to schools of residence
- Student's impairments did not limit his ability to traverse to and from school to degree greater than any other kindergartner

(San Bruno Park Unified School Dist. v. Student (OAH 2016) Case No. 2015110053)



# Eligibility: Case Example #2

## Torrance Unified School Dist. (2015)

- District refused to offer transportation to 12-year-old “permit” Student with autism from its recommended placement to Parent’s workplace (3½ miles)
- ALJ: Student’s disability interfered with or prevented her getting home from school
  - District was aware Student needed supervision due to cognitive challenges and difficulties with problem-solving in novel situations (e.g., traffic patterns, signals)

(Torrance Unified School Dist. v. Student (OAH 2015) Case No. 2014071042)



# Eligibility for Transportation: Practical Essentials

- Review assessment reports. Findings about motor skills, communication abilities, vision and hearing can assist team in determining student's transportation needs
- Consider all relevant information. IEP team should review all available information in making eligibility decision; observation of student on bus is not required, but can be helpful





# Eligibility for Transportation: Practical Essentials

- Avoid hasty eligibility decisions. Do not make transportation promises to parents without having all information to make a determination of whether student requires transportation as a related service
- Educate team members and parents about transportation. Make sure that all IEP team members, including parents, are aware of transportation services provided to general education students and that eligibility for transportation as IEP related service hinges on disability-related needs



# Eligibility for Transportation: Practical Essentials

- Placement drives transportation decisions. Consider transportation needs after making decisions about services and placement decisions to allow team to examine the full range and scope of transportation that may be implicated
- Keep up to date on transportation needs. Transportation requirements can change in direct response to student's physical or mental condition or other factors



# Design and Implementation of Transportation Services



# Design and Implementation: Legal Overview

- Once it has been determined that student requires transportation as a part of the IEP team's offer of FAPE, team must discuss and decide how, where and when transportation will be provided

(Questions and Answers on Serving Children with Disabilities Eligible for Transportation (OSERS 2009) 53 IDELR 268)



# Design and Implementation: Legal Overview

- Considerations should include
  - LRE
  - Extent of services (e.g., bus stop vs. door-to-door, pickup and drop off locations, etc.)
  - Method and means of transportation
  - Length of bus ride
  - Description of any personnel that will be provided to assist the student
  - Provision of any necessary medical procedures



# Design and Implementation: Legal Overview

- Several aspects of transportation are within district's exclusive control
  - Locations of bus stops
  - Selection of drivers and specific identification (i.e., names) of any personnel who will assist student
  - Decisions about appropriation of resources (e.g., private fleet versus contracting with companies who have independently owned vehicles)

(Letter to Smith (OSEP 1980) 211 IDELR 191; Gellerman v. Calaveras Unified School Dist. (9th Cir. 2002, unpublished) 37 IDELR 125; Student v. Los Angeles Unified School Dist. (SEHO 1997) 26 IDELR 373)



# Design and Implementation: Legal Overview

- LRE applies to transportation decisions
  - “The IDEA does not require LEAs to transport children with disabilities in separate vehicles, isolated from their peers. In fact, many children with disabilities can receive the same transportation provided to non-disabled children, consistent with the [IDEA’s LRE] requirements”

(Questions and Answers on Serving Children with Disabilities Eligible for Transportation (OSERS 2009) 53 IDELR 268)



# Design and Implementation: Legal Overview

- Spectrum of transportation typically includes
  - Walking
  - Regular school bus transportation
  - Regular school bus transportation with supports
  - Transportation on a bus for special education students
  - Public transportation
  - Transportation via taxi or specialized shuttle service
  - Medical transportation
  - Reimbursement for parent-provided transportation

(California Department of Education, Special Education Transportation Guidelines)





# Design and Implementation: Legal Overview

- Do advantages of riding in regular transportation outweigh benefits of more restrictive transportation arrangement?
  - Are there any negative factors experienced by others on the vehicle if the student rides in regular transportation?
- Safety – of student, driver and riders – is essential component of LRE decision



# Design and Implementation: Legal Overview

- Law does not specify location where transportation responsibility begins and ends
  - Decision whether student requires home-to-school (i.e., door-to-door) services is individualized based on student's needs
  - If team determines door-to-door services are required, it must determine where (e.g., front door, driveway, curb)



# Design and Implementation: Legal Overview

- Law does not address maximum amount of time student may spend on the bus, either getting to school or getting home
- OSEP has stated that overly long bus rides can result in denial of FAPE and might also be discriminatory
- Cases often examine health concerns

(Letter to Anonymous (OSEP 1993) 20 IDELR 1155)



# Safety: Case Example #1

## Menlo Park Elementary School Dist. (2010)

- Parents rejected District's transportation offer for 10-year-old with Type 1 diabetes
- Contended that transportation District proposed was unsafe because District did not make adequate provisions in the event of medical emergency
- ALJ found for District
  - Trip was very short
  - Student had history of taking bus without incident
  - Driver had been trained by school nurse

(Student v. Menlo Park Elem. School Dist. (OAH 2010) Case No. 2010020281)



# Safety: Case Example #2

## Los Angeles Unified School Dist. (2008)

- Parents claimed behavior problems exhibited by 10-year-old required transportation by taxi
- ALJ: District's proposal of bus transportation with 1:1 aide could meet Student's safety needs in LRE
- Tantrums could not be avoided, but could be controlled by aide and behavior support plan
- No evidence that taxi drivers had similar training
- Parent's dislike for bus driver was not a factor

(Student v. Los Angeles Unified School Dist. (OAH 2008) Case No. N2007060036)



# Location: Case Example #1

## Los Angeles Unified School Dist. (2007)

- Parents claimed District denied FAPE by requiring wheelchair-bound Student to meet bus at corner rather than providing door-to-door transportation
- ALJ: Student required door-to-door due to narrow, sloping street that presented significant difficulties and dangers in navigating wheelchair
- Although District buses might not be able to navigate street, smaller vehicle could safely pick up Student at his home

(Student v. Los Angeles Unified School Dist. (OAH 2007) Case No. N2007030065)



# Location: Case Example #2

## Los Angeles Unified School Dist. (2008)

- 10-year-old with SLD and no physical limitations
- District provided school-to-school transportation; Parents asked for home-to-school, claiming Student was vulnerable on walk and bus area was unsafe
- School-to-school transportation provided FAPE
- Parents' request based on concerns about transporting Student's siblings and not on Student's unique needs, which were related to academics

(Student v. Los Angeles Unified School Dist. (OAH 2009) Case No. 2008090736)



# Duration of Ride: Case Example #1<sup>96</sup>

## Oceanside Unified School Dist. (2012)

- Parent of 12-year-old with autism contended that length of commute to NPS (1½ to 2 hours) left Student fatigued, which impeded his ability to participate in his after-school ABA program
- ALJ rejected claim
  - No evidence that Student was fatigued
  - No evidence Student was denied access to ABA program
  - ABA was privately funded and not part of Student's IEP

(Student v. Oceanside Unified School Dist. (OAH 2012) Case No. 2011120626)





# Duration of Ride: Case Example #2

## Vista Unified School Dist. (2014)

- Parents claimed 14-year-old Student with autism would display maladaptive behaviors and would not tolerate 42-mile bus ride
- ALJ upheld District's offer of transportation
- Parents concerns based on conjecture
- Student had been successfully transported to school by bus at similar distances for several years
- District could meet Student's safety needs

(Vista Unified School Dist. v. Student (OAH 2014) Case No. 2014051236)



# Design and Implementation: Practical Essentials

- Get input from transportation staff and/or invite them to IEP meeting. Team might inadvertently set unrealistic demands on transportation department by holding IEP team discussions without their input
- Focus on LRE. Start by considering if student can ride general education bus and, if not, then discuss more restrictive options
- Be clear, be specific. Reduce potential for disputes by thoroughly documenting transportation offer in IEP and notes



# Design and Implementation: Practical Essentials

- Safety is foremost concern. In most cases in which the failure to provide door-to-door assistance for was found to have denied FAPE, determining factor was safety of student
- Avoid setting policy on length of bus ride. Tolerance varies from student to student; consider whether length of bus trip is detrimental to student's ability to benefit from instruction



# Design and Implementation: Practical Essentials

- Beware of missed instructional time. Unless IEP provides for shortened school day, students with disabilities should receive same amount of instructional time as their nondisabled peers
- Keep parents involved. To help parents adjust to proposed change in student's transportation arrangement, one possible strategy might include a short-term trial to assure them that their concerns will be addressed



# Larry P. (Discussion)



# **Least Restrictive Environment: Redondo Beach**



# The Legal Elements of the LRE<sup>103</sup>

To the **maximum extent appropriate**, children with disabilities are educated with children who are not disabled. Removal of children with disabilities from the regular educational environment occurs only when the **nature or severity** of the disability of a child is such that education in regular classes with the use of **supplementary aids and services** cannot be achieved **satisfactorily**.

(20 U.S.C §1412(a)(5).)



# Placement in the LRE Requires

- ❖ Decisions made on an individual basis—no categorical decision-making
- ❖ Based on each student's IEP, and
- ❖ A strong presumption that children with disabilities be educated in general education classes with appropriate aids and supports

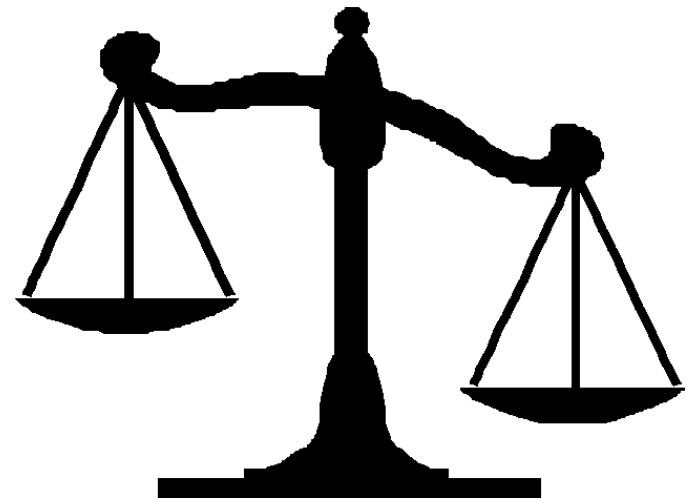




# The Rachel H. Balancing Test

Four factors:

1. Academic benefit
2. Non-academic benefit
3. Effect on teacher/students
4. Cost



Sacramento City USD v. Rachel H. (9th Cir.1994)



## **D.R. v. Redondo Beach Unified School District**

### **Facts:**

- Student with autism spent 75 percent of school day in general classroom with supplementary aides and services
- District believed that, although Student made good progress on goals, he required more direct special education instruction
- District proposed SDC placement for 56 percent of school day
- Parents rejected IEP proposals and removed Student to private placement
- ALJ and District Court upheld District's proposed placement as LRE



## Decision:

- 9th Circuit overturned District Court decision
- Case hinged on first factor of Rachel H. test—academic benefits of general classroom placement
  - Proper benchmark for assessing whether Student received academic benefits from placement in general classroom is not grade-level performance, but rather is whether Student made substantial progress toward meeting academic goals established in IEP
  - Fact that student receives academic benefits in general classroom as result of supplementary aids and services is irrelevant to analysis required under Rachel H.
- 9th Circuit, however, denied reimbursement claim

(D.R. v. Redondo Beach Unified School Dist. (9th Cir. 2022) 122 LRP 48314)



# **D.R. v. Redondo Beach Unified School District**

## **Why Does This Case Matter to Us?**

- Ninth Circuit noted that even if Student might have received greater academic benefits in District's SDC than in general classroom, IDEA's "strong preference" for educating disabled children alongside their nondisabled peers is not overcome by showing that special education placement may be academically superior to placement in general classroom



“If a child is making substantial progress toward meeting his IEP's academic goals, the fact that he might receive a marginal increase in academic benefits from a more restrictive placement will seldom justify sacrificing the substantial non-academic benefits he derives from being educated in the regular classroom.”

(D.R. v. Redondo Beach Unified School Dist. (9th Cir. 2022) 122 LRP 48314)





# Thank you for attending today!





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Separate But Substantially Equivalent:

# *Larry P. in 2023*

State SELPA Directors Meeting  
December 1, 2023

Presented by:  
Ernest Bell, attorney

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## Agenda

- An Introduction: Race, Color, Culture
- *Larry P.* Chronology
- 2022 California Department of Education Memorandum
- October 10, 2023 California Association of School Psychologists' "Response"
- Making Meaning of the Guidance
- Are Commonly Used Standardized Tests "Fixed"?
- What's Next?
- Alternative Methods of Assessment
- Legal Issues of Note



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## Race, Color, Culture

- Difficulty with understanding *Larry P.*'s ongoing relevance and application devolves in part from the concept of "race," whether we determine our own identity, and the educational (and broader) consequences of those determinations.
  - For an overview of the discussion as to "race" as a purely social construct, see <https://www.nytimes.com/2000/08/22/science/do-races-differ-not-really-genes-show.html>



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## Race, Color, Culture (cont'd)

- This presentation will at times differentiate between the terms "Black Americans" and "African American."
  - "African American refers to descendants of enslaved Black people who are from the United States." (See *Increasing Multicultural Understanding*, 2013.)
  - For an overview of this discussion, see <https://www.cbsnews.com/news/not-all-black-people-are-african-american-what-is-the-difference/>



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## Race, Color, Culture (cont'd)

- The original *Larry P.* opinion did not use the term “African American,” but *Crawford v. Honig* (9th Cir. 1994) 37 F.3d 485 did.
  - *Crawford* appears to use “African American” as a term synonymous with “Black American, irrespective of family history.”
  - If the view is that all Black individuals were and are subject to similar racial discrimination irrespective of family history, then treating the terms as synonymous might promote the spirit of the injunction more so than differentiation of individuals on the bases of familial and cultural history.
  - But this presupposes that the *Larry P.* injunction *continues to protect* students from race-based discrimination.

## Race, Color, Culture (cont'd)

- Again, when *Larry P.* was decided, this protection assumed (correctly) that standardized tests discriminate against “Black” students.
- For example, the *Larry P.* Court observed that the Wechsler Intelligence Scale for Children had been “standardized and developed on an all-white population” (*Larry P. v. Riles* (N.D. Cal. 1979) 495 F. Supp. 926, 957), leading to supposedly data-supported conclusions like “Black children score, on the average, one standard deviation below white children.” (*Id.* at 954.)

## Race, Color, Culture (cont'd)

- But the Court's observations are complicated by a number of factors, including the assumption that there is an immutable, universally applied definition of "Blackness."
- To treat the terms "African American" and "Black American" as interchangeable is to assume a monolithic community without significant variation of cultures and histories. This presentation does not make that assumption.
  - Also, as long as we are concerning ourselves with the precision of terms, the Court's concern more accurately went not to the *standardization* of testing, but instead to the *normative* populations on which the tests relied.

## Race, Color, Culture (cont'd)

- California Department of Education's 2022 guidance, and the California Association of School Psychologists' October 10, 2023 response to that guidance, have not resolve confusion about what tests are permitted, and the circumstances under which such tests are permitted. There are other unresolved questions :
  - Does the *Larry P.* injunction prohibit administration of standardized and norm-based cognitive measures to a Black student recently immigrated from Surinam? Or Brazil? Or France? Does it national of origin matter?
  - How about a student widely perceived as White, but identifies as African American?
  - Or a student widely perceived as Black, but identifies otherwise?
- Let's look at Larry P.'s history...

## Larry P.: A Chronology

- In 1971 a group of Black parents filed a lawsuit in district court, alleging that the use of standardized intelligence tests resulted in the disproportionate identification and placement of African-American students in “educable mentally retarded” (“EMR”) classes.
- In 1972, the District Court determined that the action could proceed as a class action on behalf of all Black San Francisco school children who had been classified as “mentally retarded” on the basis of IQ test results. (*P. v. Riles* (N.D. Cal. 1972) 343 F. Supp. 1306, 1315, aff’d, 502 F.2d 963 (9th Cir. 1974).)
- The District Court also granted a preliminary injunction, prohibiting the use of standardized IQ tests as a basis for placing Black students in EMR classes. (*Ibid.*)



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## Larry P.: A Chronology (cont’d)

- In 1974, the Ninth Circuit Court of Appeals affirmed the District Court’s decision. (*P. v. Riles* (9th Cir. 1974) 502 F.2d 963, 965.)
  - The Ninth Circuit reasoned that a disproportionate number of Black students had been found eligible for special education services under the eligibility category of “mental retardation” based on intelligence testing. (*Ibid.*)



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## Larry P.: A Chronology (cont'd)

- After the Ninth Circuit's decision, the plaintiffs moved to modify the class and the terms of the preliminary injunction. (*Larry P. v. Riles* (N.D. Cal. 1979) 495 F. Supp. 926, 934 "1979 Case".)
- In December 1974, the District Court ordered expansion of the class to include all Black California school children who had been, or in the future may be, classified as "mentally retarded" based on IQ tests. (*Ibid.*)



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## Larry P.: A Chronology (cont'd)

- In 1979, the District Court issued a permanent injunction preventing the use of IQ testing to evaluate Black children for placement in EMR classes or their substantial equivalents. (1979 Case, 495 F. Supp. at 933-34.)
  - In 1984, the Ninth Circuit Court of Appeals affirmed the decision, except as to state and federal constitutional violations. (*Larry P. by Lucille P. v. Riles* (9th Cir. 1984) 793 F.2d 969, 972.)



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## Larry P.: A Chronology (cont'd)

- The *Larry P.* injunction requires the State Board to seek court approval for use of standardized IQ measures when testing African-American students. To obtain court approval, proposed use of such measures must be supported by:
  - statistics on the average or mean scores of African-Americans and whites on the test or tests;
  - statistics or other data, reported separately for African-Americans and whites, which form the basis for the Board's determination that the tests are validated for the purpose(s) for which they are to be used; and
  - a certification that the State Board has held open public hearings on the proposed test or tests before reaching its determination. (1979 Case at 495 F. Supp. at 989-90.)



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## Larry P.: A Chronology (cont'd)

- In the early 1980s, California abolished the use of the EMR category.
- In 1986, the District Court modified the injunction and prohibited the use of standardized IQ tests to assess **African-American** students referred for any special education placement. (*Crawford v. Honig* (9th Cir. 1994) 37 F.3d 485, 486, as amended on denial of reh'g (Jan. 6, 1995).)



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## Larry P.: A Chronology (cont'd)

- In *Crawford v. Honig*, the plaintiffs were learning-disabled African-American children who were not part of the original *Larry P.* litigation, but who sought to have IQ tests administered to them. (37 F.3d at 486.)
- The District Court consolidated the case with *Larry P.* and found that the plaintiffs were not adequately represented in the *Larry P.* class action. (*Ibid.*) The District Court also vacated the 1986 modification, leaving intact the original *Larry P.* injunction from 1979. (*Ibid.*)



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## Larry P.: A Chronology (cont'd)

- In 1994, the Ninth Circuit affirmed the District Court's ruling, but cautioned that it had not decided the issue of the propriety of IQ testing for placement of African-American children in special education classes other than EMR-equivalent classes. (*Crawford v. Honig*, 37 F.3d at 489.)



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## Larry P.: A Chronology (cont'd)

- During subsequent years, both the California Department of Education and the Office of Administrative Hearings continued to enforce the prohibition of administering and otherwise considering standardized cognitive assessments of African-American students for any purpose. (“Clarification on the Use of Standardized Intelligence Tests with African-American Students for Special Education Eligibility Assessment” (May 29, 1997) California Department of Education, Larry P. Task Force [“CDE’s 1997 Memorandum”]; OAH Case No. 2018120695 (2018).)



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## 1997 CDE Memorandum

- In 1997, the CDE circulated an internal memorandum intended “to clarify some confusion regarding the implementation of the 1979 court ruling prohibiting the use of standardized intelligence tests for African-American students for special education eligibility assessment... .”
- The memorandum provided a list of prohibited intelligence tests (Attachment A, Part I), tests the prohibition of which was *recommended* by the “Larry P Task Force” (Part II), and tests the use of which the Larry P. Task Force also “cautioned” school assessment personnel about (Part III).



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## “Prohibited Tests for Black Assessments for Special Education”

- Arthur Point Scale
- Cattell Infant Intelligence Scale
- Columbia Mental Maturity Scale
- Draw-a-Person
- Gessell Developmental Schedule
- Goodenough-Harris Drawing Test
- Leiter International Performance Scale
- Merrill-Palmer Pre-School Performance Test
- Peabody Picture Vocabulary Test
- Raven Progressive Matrices
- Slosson Intelligence Test
- Stanford-Binet
- Van Alstyne Picture Vocabulary
- WISC, WISC-R, WAIS, WPPSI

## “Additional tests recommended as subject to the *Larry P.* prohibition”

- Cognitive Abilities Test
- Expressive One-Word Picture Vocabulary Test
- K-ABC Mental Processing Subtests
- McCarthy Scales of Children's Abilities
- Structure of Intellect Learning Aptitude Test
- Tests of Non-Verbal Intelligence
- Tests of Cognitive Ability from the Woodcock-Johnson (including the cognitive section of the Bateria Woodcock Psico-Educativa en Espanol)
- Cognitive Subtest of the Battelle Developmental Inventories

## Acceptable Tests According to “Revisiting *Larry P. v. Riles* – A CASP Convention 2006 Report”

- BADS Behavioral Assessment of Dysexecutive Syndrome
- RAVLT Rey Auditory Verbal Learning Test
- BTA Brief Test of Attention (Ages 17 – 82)
- TPT Tactile Performance Test
- CAS Cognitive Assessment System
- Stroop Test
- NEPSY A Developmental Neuropsychological Assessment
- TVPS Test of Visual Perception Skills
- CFT Rey-Osterrieth Complex Figure Test
- WCST Wisconsin Card Sort Test
- CMS Children’s Memory Scales
- WMS Wechsler Memory Scale
- CPT Continuous Performance Test
- WRAML-2 Wide Range of Assessment of Memory and Learning
- CVLT CA Verbal Learning Test (included in the D-Kefs) Sentence Repetition
- D-Kefs Delis-Kaplan Executive Function System (Ages 8 – 89)



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## 2022 CDE Guidance <https://www.cde.ca.gov/sp/se/ac/memo091422.asp>

In 2022, CDE issued guidance that “supersedes any previous guidance on this issue.” That guidance stated in pertinent part:

- Although the law on assessment has evolved, as described above, the *Larry P.* injunction remains in place, and the court retains jurisdiction over its enforcement. The *Larry P.* injunction does *not* apply to tests that are not considered standardized intelligence tests.
- “So long as LEAs follow legal requirements, **generally speaking** they have discretion in selecting which particular assessments to use in determining eligibility for special education.” [4 *E.M. v. Pajaro Valley Unified School District* (9th Cir. 2011) 652 F.3d 999, 1003.]
- “When assessing for a learning disability, LEAs are not required to consider whether the student has a severe discrepancy between intellectual ability and achievement. Rather, they must permit a model based on a student’s response to intervention, or RTI.” (20 U.S.C. § 1414[b][6].) [5 *Michael P. v. Department of Education* (9th Cir. 2011) 656 F.3d 1057, 1060-1061.]
- “When assessing for a learning disability using a severe discrepancy model, LEAs are not required to use IQ tests to determine intellectual ability.” [6 *Ford v. Long Beach Unified School District* (9th Cir. 2002) 291 F.3d 1086, 1088-1089.]



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## “CASP’s Response to CDE’s Memorandum on Special Education of African American Students - Sept 14, 2022”

On October 10, 2023, the California Association of School Psychologists issued “CASP’s Response to CDE’s Memorandum on Special Education of African American Students - Sept 14, 2022,” which states in pertinent part:

“If CDE intended to continue the expansion of the ban to all other disability categories, they would have addressed it within that statement. So **unless ID is a suspected area of disability**, school psychologists are able to exercise their judgment on what assessment tools (IQ tests) to use or not.”

“Does this mean that tests of intelligence and/or tests of overall cognitive ability can be given to African American students for all other disabilities besides ID? Can IQ tests be used for identification of Specific Learning Disability (SLD)? ¶ Yes, **as long as ID is not a suspected or potential area** of disability.”



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## 2023 CASP “Response” (cont’d)

“To address **potential ID**, look at Adaptive Behavior:

“▪ If ‘subaverage...deficits in adaptive behavior’ are not present, then ID can be ruled out and there are no restrictions regarding intelligence tests or overall measures of cognitive ability being used for African American students.

“▪ If subaverage Adaptive Behavior deficits are present and not better explained by Other Health Impairment (OHI), Emotional Disturbance (ED), Traumatic Brain Injury (TBI) or another disability area, and/or there is no evidence to support stronger problem-solving skills beyond assessed adaptive behavior (CCR 3030(b)(6), ID cannot be ruled out. In this case for African American students the ban would remain in effect, unless further information is gathered that can rule out ID.



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## 2023 CASP “Response” (cont’d)

- “Using this along with other measures such as dynamic assessment, mediated learning, and/or other tasks that can indicate competency and/or skills outlined in the 1989 Larry P Task Force Report as well as the 2012 Best practices guidelines for the assessment of African American students. Cognitive processes manual. Diagnostic Center North, California Department of Education is also recommended.”



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## 2023 CASP “Response” (cont’d)

- “We are confident because of the wording in the Sept 14, 2022 Memorandum and our discussions with CDE.
- “If the prohibition for Intelligence/Overall Cognitive Ability tests remained as part of an evaluation for SLD, CDE would have explicitly said they cannot be used instead of just quoting existing special education law as it has done in the 1992 and 1997 Memorandum.”



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## What Does the CASP Guidance Mean?

- “Does CASP’s “response” have the force of law?”
  - No. But the response hews more closely to the Larry P. injunction than does CDE’s 1997 guidance.
- “Will my LEA get in trouble if we rely on CASP’s guidance?”
  - \\_(ツ)\_/
  - The 1997 memorandum noted that CDE was “currently working with [CASP] and other interested parties to develop standards... for recommendation of acceptable tests to be used in assessing African American students’ eligibility for special education and related services.” So, CDE has acknowledged the importance of CASP’s consult. Will the courts?
- Does CDE’s 2022 Memorandum have the force of law?
  - Yes...? CDE is the agency that oversees local educational agencies, and its sensibilities control as to, e.g., compliance complaint findings.



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## What Does the CASP Guidance Mean? (cont’d)

- And again, CDE’s 2022 Memorandum “supersedes any previous guidance on this issue,” and that “[s]o long as LEAs follow legal requirements, **generally speaking** they have discretion in selecting which particular assessments to use in determining eligibility for special education.” If the law is *Larry P.*, which does not impose a blanket prohibition against the use of standardized measures, then CASP’s “response” reflects a legally compliant toe-dip into the more expansive use of standardized test instruments.



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## “As long as ID is not a suspected or potential area of disability”

- “So, EB, do you recommend use of standardized normed measures of intelligence for African-American students as long as ID is not a suspected area of disability?
  - What if a student who had not been suspected of ID eligibility tests in the ID range based on administration of a normed cognitive measure? Then what?
  - What if the student is not recommended to qualify as ID, but the IEP team does recommend a supported learning environment – e.g., a mild-moderate special day classroom?
    - What is the learning environment substantially equivalent to EMR classrooms? Are you sure a mild-moderate special day classroom is not “substantially equivalent”?
  - What if you prefer to administer non-standardized cognitive measures?
  - By the way, is it accepted in the psychologist community that commonly used normed cognitive tests produce valid results as to Black and African-American students?

## Are Commonly Used Cognitive Tests “Fixed”?

Holden, LaTasha R., and Gabriel J. Tanenbaum. 2023. Modern Assessments of Intelligence Must Be Fair and Equitable. *Journal of Intelligence* 11:126; <https://doi.org/10.3390/jintelligence11060126>

“A 2021 study by Graves et al. on whether the WISC-V is fair for Black children found evidence that did not support measurement invariance in cognitive abilities across urban Black and White youth. They also mentioned that a major problem with the WISC-V is its over-reliance on standardization samples and that previous versions had had more independent studies carried out to investigate the validity/stability of the scales. The standardization sample for the WISC-V includes racial proportions based on the United States population, which includes 13% African-American children (Graves et al. 2021). Even though that 13% is representative of the whole country, this does not provide sufficient representation for more diverse sub-populations, such as urban schools that have larger Black populations. Graves et al. focused on this in their study and had 55% Black/African-American subjects. This allowed them to better study the WISC-V for Black students.

## Are Commonly Used Cognitive Tests “Fixed”? (cont’d)

Holden, LaTasha R., and Gabriel J. Tanenbaum. 2023. Modern Assessments of Intelligence Must Be Fair and Equitable. *Journal of Intelligence* 11:126; <https://doi.org/10.3390/jintelligence11060126>

“From a perspective of equity and individual differences we already know that **working memory has been found to be harmed by forms of racial bias** (Schmader and Johns 2003) but is also shown to be important for mental resilience during identity-threatening situations (Beilock et al. 2007; Régner et al. 2010; Holden et al. 2020). Likewise, in a study of students in an urban context, Graves et al. (2021) found evidence that **fluid intelligence and working memory operate differently for Black students**, suggesting possible measurement bias across racial groups. **The finding of differences in such important domain-general processes in a ‘gold star’ cognitive assessment such as the WISC makes it difficult to view scores on this scale as fair, let alone valid.** This points to the need for more research... .”

## Are Commonly Used Cognitive Tests “Fixed”? (cont’d)

Holden, LaTasha R., and Gabriel J. Tanenbaum. 2023. Modern Assessments of Intelligence Must Be Fair and Equitable. *Journal of Intelligence* 11:126; <https://doi.org/10.3390/jintelligence11060126>

“Burgoyne et al. (2021) show that shifting the focus to domain-general subprocesses of g and moving away from crystallized measures (that focus on more culturally specific acquired knowledge) is better for reducing forms of adverse impact. Specifically, they show that **tests that focus on attentional control and domain-general executive processes involved in maintaining focus on task-relevant information (e.g., working memory tasks) provide a more equitable approach to cognitive assessments.** Moreover, additional work by Bosco et al. (2015) shows that focusing on the domain-general executive processes of attentional control and working memory was better for reducing adverse impact between racial/ethnic groups compared to using more traditional assessments that emphasize psychometric g.

## Are Commonly Used Cognitive Tests “Fixed”? (cont’d)

Holden, LaTasha R., and Gabriel J. Tanenbaum. 2023. Modern Assessments of Intelligence Must Be Fair and Equitable. *Journal of Intelligence* 11:126; <https://doi.org/10.3390/jintelligence11060126>

“Another important step is for practitioners to consider using **more inclusive assessments** such as the **KABC-II, DAS, and CAS**. Though it should be noted that these assessments have some limitations as previously mentioned, they are the most equitable assessments available currently. Despite the fact that these were not the most used among practitioners, Aston and Brown (2021) found that a majority of school psychologists felt prepared to assess students from diverse backgrounds, but part of properly assessing these students is using fair assessments. Considering that the WISC is commonly used (Aston and Brown 2021; Sotelo-Dynega and Dixon 2014; Oakland et al. 2016), they and other test-makers should discuss and evaluate how their practices are inclusive and amenable to growing forms of diversity.”

## Are Commonly Used Cognitive Tests “Fixed”? (cont’d)

Holden, LaTasha R., and Gabriel J. Tanenbaum. 2023. “Modern Assessments of Intelligence Must Be Fair and Equitable.” *Journal of Intelligence* 11:126; <https://doi.org/10.3390/jintelligence11060126>

### Citations:

- Aston, Candice, and Danice L. Brown. 2021. “Progress or Setback: Revisiting the Current State of Assessment Practices of Black Children.” *Contemporary School Psychology* 25: 140–48.
- Beilock, Sian L., Robert J. Rydell, and Allen R. McConnell. 2007. “Stereotype threat and working memory: Mechanisms, alleviation, and spillover.” *Journal of Experimental Psychology: General* 136: 256–76.
- Bosco, Frank, David G. Allen, and Kulraj Singh. 2015. “Executive attention: An alternative perspective on general mental ability, performance, and subgroup differences.” *Personnel Psychology* 68: 859–98.
- Burgoyne, Alexander P., Cody A. Mashburn, and Randall W. Engle. 2021. “Reducing adverse impact in high-stakes testing.” *Intelligence* 87: 101561.
- Graves, Scott L., Leanne V. Smith, and Kayla D. Nichols. 2021. “Is the WISC-V a Fair Test for Black Children: Factor Structure in an Urban Public School Sample.” *Contemporary School Psychology* 25: 157–69.



## Are Commonly Used Cognitive Tests “Fixed”? (cont’d)

Holden, LaTasha R., and Gabriel J. Tanenbaum. 2023. “Modern Assessments of Intelligence Must Be Fair and Equitable.” *Journal of Intelligence* 11:126; <https://doi.org/10.3390/jintelligence11060126>

### Citations:

- Régner, Isabelle, Annique Smeding, David Gimmig, Catherine Thinus-Blanc, Jean-Marc Monteil, and Pascal Huguet. 2010. “Individual Differences in Working Memory Moderate Stereotype-Threat Effects.” *Psychological Science* 21: 1646–48.
- Schmader, Toni, and Michael Johns. 2003. “Converging evidence that stereotype threat reduces working memory capacity.” *Journal of Personality and Social Psychology* 85: 440–52.

## Are Commonly Used Cognitive Tests “Fixed”? (cont’d)

Taylor, Rachel Y., “Structural Validity Evidence of the Wechsler Intelligence Scale for Children - Fifth Edition with African-American Students who have been Referred for Evaluation.” Dissertation, Georgia State University, 2019. doi: <https://doi.org/10.57709/15089299>

“During the 2014-2015 school year, 6.6 million students enrolled in public schools in the United States received special education and related services. School psychologists serve as integral members of the multidisciplinary teams that determine eligibility for special education and related services, because we administer the psycho-educational evaluations used in making decisions about eligibility. Benson et al. (2019) examined test usage and assessment procedures of school psychologists. The Wechsler Intelligence Scale for Children - Fifth Edition was determined to be the most frequently administered cognitive assessment. It was used more frequently than the next five most used cognitive tests combined.

## Are Commonly Used Cognitive Tests “Fixed”? (cont’d)

Taylor, Rachel Y., “Structural Validity Evidence of the Wechsler Intelligence Scale for Children - Fifth Edition with African-American Students who have been Referred for Evaluation.” Dissertation, Georgia State University, 2019. doi: <https://doi.org/10.57709/15089299>

“Eighty percent of the 1317 school psychologists participating in the study utilize the WISC-V. ... [I]t would be expected that the WISC-V would be administered 90,182 times per month. ... These findings provide some evidence of structural validity of the WISC-V with a referred sample of African-American students. However, more research is needed to gain further support of the WISC-V’s structural validity with this subpopulation of students. It may be beneficial to replicate this study with a national sample of African-American students. This would reveal whether the results of this study are unique to this sample of students, who attended the same school system, or whether they are generalizable to the African American population.”

- Benson, N. F., Floyd, R. G., Kranzler, J. H., Eckert, T. L., Fefer, S. A., & Morgan, G. B. (2019). “Test use and assessment practices of school psychologists in the United States: Findings from the 2017 National Survey.” *Journal of School Psychology*, 72, 29-48. doi: 10.1016/j.jsp.2018.12.004

## So, What Next?

- *Larry P.* and CDE’s blanket prohibition(?) remain the law of the land.
  - What is CDE saying in its 2022 guidance? Why isn’t CDE saying more?
- The important broader discussion is being spearheaded by the African American psychologist community. The CASP response is an important step.
- Even if assessors would like to use normed instruments, they (the assessors) should be aware that those tests still might produce biased/unreliable results.
- Assessors should discuss with parents what normed test data do, and do not, mean.

## So, What Next? (cont'd)

- Is it impossible to appropriately assess a Black student without use of a normed cognitive test? No.
  - District “did not agree with Parents’ counsel’s request to assess Student using standardized IQ testing and cognitive assessments and measures which could be deemed racially discriminatory and prohibited by the California Department of Education’s guidance and case law following *Larry P.* [District] did not agree to assess using a racially matched assessor.” District’s refusal to assess Student using standardized IQ measures, or by assigning a racially matched assessor did not deny Student a FAPE. (OAH Case No. 2022120076.)



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## So, What Next? (cont'd)

- Even if assessors would like to use normed instruments, and even if parents are supportive of such testing, and even if ID is not suspected, stakeholders (assessors, parents, students, and IEP team members) should be aware that today’s tests – even if normed based on representative populations -- *still might produce biased/unreliable results.*
  - So? Was anyone going to rely solely on one standardized measure?
- Accordingly, maintaining the status quo as to testing the cognitive functioning of Black students is likely the most legally compliant, if not most reliable and valid, methods of assessment.



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## Alternative Methods of Assessment

- As a threshold consideration, there is a significant need for **assessor training in cultural competence** as to Black / African American communities, along with other communities of color.
- NNAT (OAH Case Nos. 2011060184 & 2011050289) is a permissible test instrument in California
  - Re: the DAS, see OAH Case No. 2018120695 (discussed in a later slide)
- Review of student's records for history and development, adaptive behavior, classroom performance, and academic achievement
- Observations
- Parent/teacher interviews



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## Legal Issues of Note: What if Parents Change Student's Racial Identification?

- The scant legal guidance available suggests Parents, not the District, should determine the race of a child. (*Fagerstrom v. City of Savannah, Ga.* (11th Cir. 2015) 627 F. App'x 803, 805 ["Self-identification is an accepted method of establishing racial identity; in fact, it is the [Equal Employment Opportunity Commission's] preferred method. See *EEOC v. Kaplan Higher Educ. Corp.*, 748 F.3d 749, 753 (6th Cir. 2014)... .")
- The primary "problem" for assessors in avoiding constraints that might follow from a student's racial identification is if prior documentation contradicts current identification.



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## Legal Issues of Note: OAH Case No. 2015050567 (2015)

- In this matter, the school psychologist conducted a psychoeducational assessment that included a review of records.
  - Mother identified Student as African-American and Hispanic in his original enrollment packet.
  - At some point, the school's database no longer identified Student as African-American.
  - The assessor did not notice the original designation had been changed.
- The assessor administered the WISC-IV to Student as part of the assessment.



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## Legal Issues of Note: OAH Case No. 2015050567 (cont'd)

- The family challenged the assessment as violative of the *Larry P.* injunction.
- The assessor made the following arguments at hearing:
  - She didn't know at the time Student was African American.
  - Student was adopted at birth and raised by a Hispanic, not African-American, family.
  - Bias is reduced when an African-American child is adopted by parents of another ethnicity.
- The judge rejected these arguments (the judge really disliked the assessor), finding there was no support for these positions.



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## Legal Issues of Note: OAH Case No. 2015050567 (cont'd)

- The judge found an ongoing *Larry P.* violation because the prior 2013 IQ scores (used to support a finding of ineligibility) were also included in the 2015 psychoeducational report for historical purposes.
- To prevent its continued use, the violative scores needed to be removed from Student's pupil records.
- As remedy for "the continuing violation of incorporating" the IQ results, the District was ordered to:
  - Seal the prohibited test results and protocols; and
  - Amend the 2013 and 2015 reports to remove the references.



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## Legal Issues of Note: Curing a *Larry P.* Violation

- Violation of the *Larry P.* injunction is a procedural one.
- While it is possible for a procedural denial of a free appropriate public education to result in a finding of a substantive denial of FAPE, we do not find any cases in which a violation of the *Larry P.* injunction results in a substantive denial of FAPE.
- Although there are few cases that address *Larry P.* violations, it appears the remedy is removal of prohibited test results from the student's record, or refrain from using a specific protocol.



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## Legal Issues of Note: Curing a *Larry P.* Violation (cont'd)

- OAH Case No. 2015050567 (2015): District was ordered to seal the test results and protocols.
- OAH Case Nos. 2015120472 & 201603001 (2016): School psychologist's removal of IQ scores from the student's assessment report upon realizing the student identified as African American was sufficient to remedy the use of prohibited tests.
- OAH Case No. 2018120695 (2018): District could not use the Differential Ability Scales because it did not "provide any legal authority establishing that the Ability Scales can be administered without violating the *Larry P.* injunction."

# Question & Answer Session



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

REF: V-A

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**SANTA BARBARA COUNTY SPECIAL EDUCATION LOCAL PLAN AREA**  
**JOINT POWERS AGENCY BOARD**

**MINUTES OF November 6, 2023, REGULAR MEETING**

**Public Session – 12:00 p.m.**

**Via ZOOM – Meeting ID: 882 0161 9790**

**Santa Barbara County Education Office**  
**Board Room**

**4400 Cathedral Oaks Rd., Santa Barbara, CA 93110**

**Orcutt Union School District Office –**  
**Technology Center**

**500 Dyer Street, Orcutt, CA 93455**

**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 **12:00 p.m.** at SBCEO Board Room, Santa Barbara, CA.

**B. Roll Call**

Lindsay MacDonald took membership roll call.

Members Present: Amy Alzina, *Clerk*

Holly Edds

Antonio Garcia

Anne Hubbard, *Chairperson*

Randal Haggard, *Vice-Chairperson* (arrived at 12:09 p.m.)

Emilio Handall

Susan Salcido

Members Absent: Hilda Maldonado

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

Lindsay MacDonald, SBCSELPA Office Manager

Jennifer Connolly, SBCSELPA Coordinator

Rachel Wigle, SBCSELPA Chief Business Official

Brian Helt, SBCSELPA Executive Assistant

Rosy Bucio, SBCSELPA BCBA

Alison Lindsey, SBCSELPA Mental Health Manager

Kirsten Escobedo, Assistant Superintendent, Special Education, SBCEO

**C. Flag Salute**

Anne Hubbard led the assembly in the Pledge of Allegiance.

**D. Welcome Guests**

Ray Avila began by welcoming our regular meeting attendees that are not on the Board or from SBCSELPA, Kirsten Escobedo joined this meeting. There were no other guests in attendance at the meeting.



SBCSELPA JPA BOARD  
MINUTES OF NOVEMBER 6, 2023

I. **PUBLIC SESSION** *(continued)*

E. **SBCSELPA Executive Director's Report**

Ray Avila reviewed the report he prepared for the JPA Board, highlighting item 5, Legislative Updates and significant bills that have recently been approved. Specifically focusing on bill ***AB 248 (Mathis) Individuals with intellectual or developmental disabilities; removes obsolete terminology including "mentally retarded persons" "mentally retarded children" "retardation"***; that has been passed. Ray further highlighted item 8, SBCSELPA & SBCEO Support for LCAP Planning. Sharing that the SBCSELPA has been invited by SBCEO to collaborate in support of the LEAs in SB County for LCAP planning, SBCSELPA appreciates this opportunity! 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 approves the Action Agenda as presented.

**Motion to Approve:** Emilio Handall **Second:** Amy Alzina

**Vote:** 6 – 0 The motion passed with JPA Board Members Amy Alzina, Holly Edds, Antonio Garcia, Emilio Handall, Anne Hubbard, and Susan Salcido voting in favor; none opposed.

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

A. **Minutes of October 2, 2023 Regular Meeting**

B. **Ratification of Payment of Claims:** 01-760277 – 01-760290, 01-761301 – 01-761307, 01-762300 – 01-762321, 01-763541 – 01-763553, 01-764779 – 01-764792.

C. **2023-2024 Nonpublic School (NPS) Individual Service Agreements (ISAs)**

1. Individual Service Agreement: Elevations Academy RTC
2. Individual Service Agreement: Greenacre Homes & School

D. **2023-2024 Nonpublic School (NPS) Master Contract Exhibit A Rates**

1. Exhibit A Rates Sheet: Elevations Academy RTC

**Recommendation:** The JPA Board approves Consent Agenda Items A through D as presented.

**Motion to Approve:** Susan Salcido **Second:** Amy Alzina

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

**Vote:** 6 – 0 The motion passed with JPA Board Members Amy Alzina, Holly Edds, Antonio Garcia, Emilio Handall, Anne Hubbard, and Susan Salcido voting in favor; none opposed.

***Randal Haggard (arrived at 12:09 p.m.)***

SBCSELPA JPA BOARD  
MINUTES OF NOVEMBER 6, 2023

VI. **PRESENTATION**

A. **SBCSELPA G.R.O.W.: A Therapeutic Wellness Framework Presentation**

**Presenters: Alison Lindsey, SBCSELPA Mental Health Manager, & Rosy Bucio, SBCSELPA Board Certified Behavior Analyst (BCBA)**

Alison Lindsey and Rosy Bucio shared a PowerPoint presentation with the JPA Board reviewing the G.R.O.W. Program, a therapeutic wellness framework, that they have developed and implemented in our Districts. GROW is a therapeutic wellness framework that sees and educates the whole child. GROW places an emphasis on supporting students to regulate their nervous systems through evidence-based strategies, therefore helping them to feel safe, connected, and available to learn. The Board was complimentary and thankful for the hard work and dedication these 2 educators have shown to the students in our County through implementing this program. The board was satisfied; there were no further questions or comments.

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

A. **SBCSELPA Memorandums of Understanding (MOUs) for services provided by SBCSELPA to LEAs**

1. MOU for BCBA Hours & Services
2. MOU for SB-PIC Intern Placement & Services
3. MOU for Graduate Student Research Services

**Recommendation:** The JPA Board approves the 3 Memorandums of Understanding (MOUs) for services provided by SBCSELPA to LEAs as presented.

**Motion to Approve:** Randall Haggard **Second:** Holly Edds

**Vote:** 7 – 0 The motion passed with JPA Board Members Amy Alzina, Holly Edds, Antonio Garcia, Randal Haggard, Emilio Handall, Anne Hubbard, and Susan Salcido voting in favor; none opposed.

Ray Avila introduced this item sharing that the proposed MOUs are templates to establish formal agreements on an annual basis for contracted services provided to LEAs. The Board was satisfied; there were no questions or comments.

B. **SBCSELPA School Psychologist Internship Placement Agreement**

1. Internship Placement Agreement

**Recommendation:** The JPA Board approves the SBCSELPA School Psychologist Internship Placement Agreement as presented.

**Motion to Approve:** Emilio Handall **Second:** Holly Edds

**Vote:** 7 – 0 The motion passed with JPA Board Members Amy Alzina, Holly Edds, Antonio Garcia, Randal Haggard, Emilio Handall, Anne Hubbard, and Susan Salcido voting in favor; none opposed.

Ray Avila introduced this item sharing that the proposed MOU template is to establish a formal agreement between SBCSELPA and SB-PIC Interns, like the other MOUs utilized as part of the SB-PIC program. The Board was satisfied; there were no questions or comments.

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

C. **Santa Barbara County Education Office (SBCEO) Regional Program Operator Request for Funding for Additional Support Staff for Dunlap Elementary DHH program for the 2023-24 School Year**

1. SBCEO Request

**Recommendation:** The JPA Board approves the SBCEO Regional Program request for funding of additional support staff for Dunlap Elementary DHH program for the 2023-2024 school year as presented.

**Motion to Approve:** Holly Edds **Second:** Emilio Handall

**Vote:** 7 – 0 The motion passed with JPA Board Members Amy Alzina, Holly Edds, Antonio Garcia, Randal Haggard, Emilio Handall, Anne Hubbard, and Susan Salcido voting in favor; none opposed.

Kirsten Escobedo reviewed this item with the Board. SBCEO requested five (5) hours per day of additional staffing support, specifically, a signing aide. This increase will assist the teacher in best practices for students with various disabilities. The Board was satisfied; there were no questions or comments.

D. **Santa Barbara County Education Office (SBCEO) Regional Program Operator Request for Funding for Program Expansion of SBCEO Preschool Assessment Team for 2023-24 School Year**

1. SBCEO Request

**Recommendation:** The JPA Board approves the SBCEO Regional Program request for funding for expansion of SBCEO Preschool Assessment Team for the 2023-2024 school year as presented.

**Motion to Approve:** Randal Haggard **Second:** Antonio Garcia

**Vote:** 7 – 0 The motion passed with JPA Board Members Amy Alzina, Holly Edds, Antonio Garcia, Randal Haggard, Emilio Handall, Anne Hubbard, and Susan Salcido voting in favor; none opposed.

Kirsten Escobedo reviewed this item with the Board. SBCEO request an additional 1.0 FTE Preschool Assessment Team teacher to assist with the influx of assessments this year. The board was satisfied; there were no questions or comments.

VIII. **ITEMS SCHEDULED FOR INFORMATION AND DISCUSSION**

A. **SBCSELPA Local Plan Revision, Section 9, Part XVII, Out-of-Home Care** *(First Reading)*

1. Local Plan revisions

Rachel Wigle introduced and reviewed this item. Rachel explained that these revisions are necessary to align with the state's new calculation for distribution of funds effective for the 2021-2022 school year. The Board was satisfied; there were no questions or comments.



**Checks Dated 09/20/2023 through 10/25/2023**

Check Number	Check Date	Pay to the Order of	Fund-Object	Expensed Amount	Check Amount
01-760277	09/26/2023	Avila, Ray S	01-4300		128.29
01-760278	09/26/2023	Bucio, Rosy	01-5200		1,061.30
01-760279	09/26/2023	Connolly, Jennifer	01-4300		57.17
01-760280	09/26/2023	Lindsey, Alison	01-5200		623.74
01-760281	09/26/2023	Aldous Pabon	01-5860		3,000.00
01-760282	09/26/2023	Big Green Cleaning Company	01-5860		500.00
01-760283	09/26/2023	Catherine Park	01-5860		3,000.00
01-760284	09/26/2023	Emma Warren	01-5860		3,000.00
01-760285	09/26/2023	Frontier	01-5910		114.19
01-760286	09/26/2023	Gabrielle Esposito	01-5860		3,000.00
01-760287	09/26/2023	Montecito Union School	01-5830		2,125.00
01-760288	09/26/2023	Patterson Associates	01-5600		5,770.17
01-760289	09/26/2023	Santa Maria-Bonita School Dist	01-5830		29,750.00
01-760290	09/26/2023	School Services of California	01-5860		1,500.00
01-761301	10/03/2023	Frontier	01-5910		142.69
01-761302	10/03/2023	██████ NPS 2022-23-76	01-5890		448.40
01-761303	10/03/2023	Leticia Leon	01-4310		19.36
01-761304	10/03/2023	Monica Santana	01-4310		10.90
01-761305	10/03/2023	North Valley Schools Inc.	01-5890		16,328.00
01-761306	10/03/2023	Regents of Univ. of CA	01-5100		12,838.86
01-761307	10/03/2023	Securitas Technology Corp.	01-5860		276.57
01-762300	10/10/2023	Bucio, Rosy	01-5910		35.00
01-762301	10/10/2023	Connolly, Jennifer	01-5200		381.73
01-762302	10/10/2023	Facio-Leon, Natalie	01-5910		35.00
01-762303	10/10/2023	Foote, Lisa A	01-5910		35.00
01-762304	10/10/2023	Alexandra Holdom	01-5200		35.00
01-762305	10/10/2023	Big Green Cleaning Company	01-5860		387.00
01-762306	10/10/2023	CRISIS PREVENTION INSTITUTE	01-5800		16,996.00
01-762307	10/10/2023	Frontier	01-5910		169.02
01-762308	10/10/2023	Jane Harpster	01-4310		220.57
01-762309	10/10/2023	Jazmin Estebez	01-5910		35.00
01-762310	10/10/2023	JRG Legal Consulting	01-5830		2,762.50
01-762311	10/10/2023	Rachel Bidinost	01-5910		35.00
01-762312	10/10/2023	Sage Communications, Inc.	01-5910		590.57
01-762313	10/10/2023	Santa Barbara Charter School	01-7281		340.00
01-762314	10/10/2023	Santa Barbara County Education Office	01-7282		75,883.00
01-762315	10/10/2023	Santa Barbara Unified District	01-5860		24,655.92
01-762316	10/10/2023	Santa Maria Times	01-5840		1,320.00
01-762317	10/10/2023	Staples Business Credit	01-4310		220.47
01-762318	10/10/2023	Tania Nunez De La Torre	01-5910		35.00
01-762319	10/10/2023	Tina Kurrels	01-5910		35.00
01-762320	10/10/2023	Verizon Wireless	01-5910		220.56
01-762321	10/10/2023	X Tech Laser Printing Inc.	01-5860		515.78
01-763541	10/17/2023	Avila, Ray S	01-5200		1,240.08
01-763542	10/17/2023	Foote, Lisa A	01-5200		273.46

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 09/20/2023 through 10/25/2023**

Check Number	Check Date	Pay to the Order of	Fund-Object	Expensed Amount	Check Amount
01-763543	10/17/2023	ALD Telecom	01-5910		63.15
01-763544	10/17/2023	CPR COMPUTER SERVICES	01-5860		1,080.00
01-763545	10/17/2023	Devereux ABH	01-5890	17,030.40	
			01-5892	4,548.80	21,579.20
01-763546	10/17/2023	Greenacre Home and School	01-5890	16,328.00	
			01-5892	5,571.44	21,899.44
01-763547	10/17/2023	Jazmin Estebez	01-4300		47.39
01-763548	10/17/2023	Lauren Bussian	01-4310		684.23
01-763549	10/17/2023	Leticia Leon	01-4310		22.29
01-763550	10/17/2023	North Valley Schools Inc.	01-5890		16,328.00
01-763551	10/17/2023	Ponzuric Learning Solutions	01-5800		2,615.38
01-763552	10/17/2023	VISA	01-4300	604.39	
			01-5800	879.81	
			01-5860	336.76	1,820.96
01-763553	10/17/2023	Yolanda Horton	01-5200		1,317.39
01-764779	10/24/2023	Avila, Ray S	01-4300		128.70
01-764780	10/24/2023	ACSA	01-5300		135.61
01-764781	10/24/2023	Alexandra Holdom	01-5200		987.02
01-764782	10/24/2023	Frontier	01-5910		132.63
01-764783	10/24/2023	Great America Financial Svcs.	01-5860		188.93
01-764784	10/24/2023	Hatch & Cesario	01-5830		4,240.00
01-764785	10/24/2023	HEATHER BOUVIER	01-8699		203.99
01-764786	10/24/2023	Jazmin Estebez	01-5200		833.09
01-764787	10/24/2023	Lava Heights Academy	01-5890	9,240.00	
			01-5892	3,300.00	12,540.00
01-764788	10/24/2023	North Valley Schools Inc.	01-5890		12,579.00
01-764789	10/24/2023	Rachel Bidinost	01-8699		35.00
01-764790	10/24/2023	Santa Barbara Charter School	01-7281		1,226.36
01-764791	10/24/2023	Securitas Technology Corp.	01-5860		70.11
01-764792	10/24/2023	Tania Nunez De La Torre	01-5200		799.43
<b>Total Number of Checks</b>			<b>70</b>		<b>311,708.60</b>

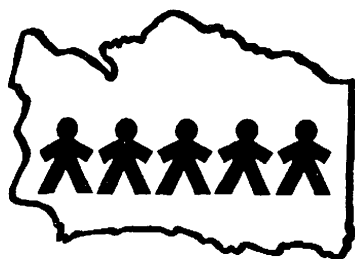
**Fund Recap**

Fund	Description	Check Count	Expensed Amount
01	General Fund	70	311,708.60
	Total Number of Checks	70	311,708.60
	Less Unpaid Tax Liability		.00
	<b>Net (Check Amount)</b>		<b>311,708.60</b>

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**

**SCHOOL PSYCHOLOGIST INTERNSHIP PLACEMENT AGREEMENT**

This School Psychologist Internship Placement Agreement is entered into by and between the Santa Barbara County Special Education Local Plan Area, a joint powers agency comprised of 25 local education agencies operating under the current Joint Exercise Of Powers Agreement of the Santa Barbara County SELPA ("JPA") (hereinafter, "SBCSELPA"), which participates as an Internship Partner in the Santa Barbara Psychology Internship Consortium ("SB-PIC"), and **Orcutt Union School District**, a local education agency who is a member of the SBCSELPA and party to the SBCSELPA JPA (hereinafter, "LEA", collectively with SBCSELPA, "Parties").

**SB-PIC Intern Name:** Catherine (Hee Kyung) Park      Email : heekyungpark@umass.edu

Mailing Address: Local: 1065 Village Dr. #204      Phone: 857-998-2000

Mail: 11400 W. Parmer Ln.

City: Orcutt      State: CA      Zip : 93455

Cedar Park      TX      78613

The above named Intern is a doctoral-level psychology student participating in the SB-PIC internship program, who is seeking placement as a School Psychology Intern with a local education agency located within SBCSELPA as part of the SB-PIC program for the 2023-2024 school year (hereinafter, "SB-PIC Intern"). The purpose of this Agreement is to set forth the terms and conditions of the Parties to effectuate SBCSELPA's coordination of placement of SB-PIC Intern in LEA as a school psychology intern for the 2023-2024 school year.

**RECITALS**

**Whereas**, LEA desires to receive an average of 35 hours per week of school psychologist intern services from SB-PIC Intern over 190 business days between August 1, 2023 and June 30, 2024, in furtherance of intern's pursuit of a degree/certification in school psychology and according to the terms and conditions of the SB-PIC program; and,

**Whereas**, SBCSELPA represents itself as able and willing to coordinate such placement of SB-PIC Intern at LEA and to provide supervision, didactic training, and a stipend payment to SB-PIC Intern on behalf of LEA to effectuate the requirements of the SB-PIC program, and in consideration of the benefit of SB-PIC Intern's school psychologist intern services to the LEA;

**Now Therefore**, the Parties agree to enter into this School Psychologist Internship Placement Agreement ("Agreement") for the mutual benefit of the Parties as participants in the SB-PIC program,

***SB-PIC Internship Placement Agreement, page 2***

in accordance with the *SB-PIC Intern Handbook* posted on the SB-PIC website (www.SB-PIC.org) for the current school year, and as may be updated from time to time during the course of this Agreement, which is hereby incorporated into this Agreement by reference.

**A. TERM OF THE AGREEMENT/EFFECTIVE DATE OF AGREEMENT**

The Term of this Agreement shall be August 1, 2023 to June 30, 2024. The effective date of this Agreement shall be August 1, 2023.

**B. PROMISES OF LEA**

LEA agrees to comply with the requirements of Partner agencies in the SB-PIC training program, including all relevant requirements stated in the *SB-PIC Intern Handbook*, and make available to SB-PIC Intern at least 1500 hours of internship program activities and training during the academic year, for a total of 190 business days, by:

- Assigning SB-PIC Intern to perform a total of 35 hours per week (average) of school psychologist intern services provided to and on behalf of LEA students, according to LEA and students' needs, under the ongoing oversight and supervision of a fully credentialed school psychologist of the LEA; and,
- Permitting SB-PIC Intern to attend 5 hours per week (average) of supervision and didactic training activities provided by the SBCSELPA, as well as monthly full-day didactic professional development trainings required of interns in the SB-PIC program; and,
- Payment to SBCSELPA of \$40,000 for SBCSELPA administration of SB-PIC program as set forth in Paragraph C (PROMISES OF SBCSELPA), and stipend payments made to SB-PIC Intern as set forth in Paragraph D (STIPEND) below.

**C. PROMISES OF SBCSELPA**

SBCSELPA agrees to comply with the requirements of Partner agencies in the SB-PIC training program, including all relevant requirements stated in the *SB-PIC Intern Handbook*, and make available to SB-PIC Intern at least 1500 hours of internship program activities and training during the academic year, for a total of 190 business days, by:

- Coordinating placement of SB-PIC Intern in LEA according to the terms of this Agreement; and,
- Providing 5 hours per week (average) of supervision and didactic training activities for SB-PIC Intern per week, to include doctoral level clinical psychologist supervision for the SB-PIC Intern for an average of two hours of individual and group supervision each week, and monthly full-day didactic professional development trainings required of interns in the SB-PIC program; and,
- Receiving and maintaining SB-PIC Intern's monthly internship hours log and paying a monthly stipend to SB-PIC Intern on behalf of LEA, as set forth in Paragraph D (STIPEND) below.

**D. STIPEND**

In accordance with SB-PIC program requirements, and in recognition of the valuable



contributions of the school psychologist intern services provided to the LEA of placement, SBCSELPA shall provide a stipend to SB-PIC Intern on behalf of the LEA of placement, which LEA agrees to reimburse, in the total amount of thirty thousand dollars (\$30,000), paid in ten monthly installments during the term of this Agreement, upon SB-PIC Intern's monthly certification of their participation in ongoing internship activities.

### **GENERAL CONDITIONS**

1. **Independent Contractor.** Parties acknowledge and agree that SB-PIC Intern is acting in an independent status and not as an agent or employee of SBCSELPA or LEA. This means SB-PIC Intern shall be wholly responsible for the manner in which SB-PIC Intern participates in internship activities and performs school psychologist intern services provided under this Agreement.
2. **LEA of Responsibility.** As the district of residence and/or responsibility for all students served by the internship services delivered pursuant to this Agreement, LEA retains financial and legal responsibility for LEA's development and offer of a free appropriate public education ("FAPE") and provision of special education and related services under state and federal law to its students. Parties acknowledge and agree that LEA is and shall remain the LEA of special education responsibility for any and all LEA students served pursuant to this Agreement, for all purposes, including but not limited to, with regard to any of the matters described in Title 34 of the Code of Federal Regulations, Part 300.503(a)(1) and (2) (relating to the identification, evaluation or educational placement of a child with a disability, or the provision of FAPE to the child) and Section 504 of the Rehabilitation Act of 1973 ("Section 504").
3. **Governing Law.** This Agreement shall be governed by the laws of the State of California.
4. **JPA.** Nothing in this Agreement shall be construed to supplant, modify or otherwise alter any of the terms, conditions, or obligations of the JPA. If there is any conflict found between this Agreement and the JPA, the JPA shall control.
5. **Insurance.** Both Parties shall procure and maintain insurance for workers' compensation, general liability, and property coverage. Parties agree to maintain such coverage for the duration of this Agreement and shall provide proof of coverage upon request.
6. **Indemnification and Hold Harmless.**
  - (a) To the fullest extent allowed by law, LEA agrees to defend, indemnify, and hold harmless SBCSELPA and its Board Members, administrators, employees, agents, attorneys, volunteers, and subcontractors ("SBCSELPA Indemnitees") against any and all claims, lawsuits, actions, administrative or special proceedings, whether judicial or administrative in nature, to include any loss, liability, or expense, including reasonable attorney's fees and costs of defense, arising as a result of SBCSELPA's obligations under this Agreement ("Claims").
  - (b) LEA's duty and obligation to defend shall arise immediately upon tender of a request to defend a due process hearing complaint under the Individuals with Disabilities in Education Act or Section 504, or any related lawsuit naming the SBCSELPA. The duty to indemnify and defend shall include any and all obligations including liabilities or debts incurred by the SBCSELPA as a result of the LEA's negligence which results in the SBCSELPA incurring any loss including but not limited to as a result of any administrative proceeding or civil

action.

- (c) LEA's obligation to defend, indemnify, and hold harmless the SBCSELPA per this Agreement shall not apply if it is ultimately adjudicated that any Claim was proximately caused by the negligent, intentional or willful act or omission of SBCSELPA, including, without limit, its agents, employees, subcontractors or anyone employed directly or indirectly by it (excluding LEA Board Members, administrators, employees, agents, attorneys, volunteers, and subcontractors). The defense and indemnification obligations of this Agreement are to be undertaken in addition to, and shall not in any way be limited by, the insurance obligations contained in this Agreement; and, shall survive the termination or completion of this Agreement for the full period of time allowed by law.

- 7. **Fiscal Liability of SBCSELPA.** SBCSELPA's payment obligation under this Agreement shall be limited to the payment to SB-PIC Intern provided for in the "STIPEND" section of this Agreement, on behalf of LEA. SBCSELPA shall not be liable for any special consequential, indirect or incidental damages, including but not limited to lost profits in connection with this Agreement.

## 8. Remedies.

- (a) If LEA has concerns about the conduct or performance of the SB-PIC Intern or if SB-PIC Intern expresses concerns about LEA's provision of internship activities pursuant to this Agreement, LEA agrees to abide by the SB-PIC Policies and Procedures of Evaluation, Due Process, Termination & Grievance as stated in the *SB-PIC Intern Handbook*. LEA understands that it will be responsible for reimbursement to SBCSELPA for SB-PIC Intern's Stipend for the full term of this Agreement, unless SB-PIC Intern withdraws or is withdrawn from placement with LEA, in writing, pursuant to the policies and procedures of the SB-PIC internship program.
- (b) If LEA fails to perform any term, covenant, or condition contained in this Agreement and as such is in default of this Agreement, and such default is continuing, the SBCSELPA may, individually or in combination with any other remedy:
  - 1. Terminate this Agreement upon ten days written notice or less at the discretion of the SBCSELPA, subject to completion if applicable of SB-PIC Policies and Procedures of Evaluation, Due Process, Termination & Grievance, including any appeals. SBCSELPA shall specify the date of termination in its written notice of termination for default. As applicable, SBCSELPA shall continue to pay stipend installment(s) to SB-PIC Intern, as required by SB-PIC program requirements, and LEA agrees to reimburse SBCSELPA, at a per diem rate of \$210.52 per business day as warranted;
  - 2. Withhold funds due to LEA pursuant to this Agreement or otherwise;
  - 3. Cure the default, in which event all amounts expended by the SBCSELPA in effecting such cure shall be payable upon demand; or
  - 4. Exercise any other remedy available by law.

**SB-PIC Internship Placement Agreement, page 5**

The SBCSELPA shall have no obligation to exercise any of the foregoing remedies. The failure of the SBCSELPA to seek redress for violation of, or to insist upon, the strict performance of any term or condition of this Agreement shall not be deemed a waiver of such term or condition, or prevent a subsequent similar act from again constituting a violation of such term or condition.

9. **Entire Agreement.** Except as otherwise expressly stated herein, this Agreement contains the sole and entire agreement and understanding of the Parties with respect to the terms set forth herein. No representations, oral or otherwise, expressed, or implied other than those contained in this Agreement are part of the terms or consideration of this Agreement.
10. **Severability.** If any terms, condition or provision of this Agreement is held by a court of competent jurisdiction to be invalid, void, or unenforceable, the remaining provisions will nevertheless continue in full force and effect, and shall not be affected, impaired or invalidated in any way.

**THIS AGREEMENT IS ENTERED INTO THIS   1   DAY OF   July  , 2023.**

**Santa Barbara County SELPA, a JPA**

**LEA**

\_\_\_\_\_  
Dr. Ray Avila, Ph.D

Director, SBCSELPA

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

\_\_\_\_\_  
Name: Mary Andrade

Title: Director of Fiscal Services

Date: 11-28-2023

JPA Board Approved/Ratified (date): \_\_\_\_\_

310-3/6677844.1



CERTIFICATION OF SIGNATURES

As clerk/secretary to the governing board of the above-named district, I certify that the signatures shown below in **Column 1** are the verified signatures of the members of the governing board. I certify that the signatures shown in **Column 2** are the verified signatures of the person or persons authorized to sign notices of employment, contracts and orders drawn on the funds of the district. These certifications are made in accordance with the provisions of Education Code Sections:

**K-12 Districts:** 35143, 42632, and 42633, 17604

If persons authorized to sign orders as shown in **Column 2** are unable to do so, the law requires the signatures of the majority of the governing board.

These approved signatures are valid for the period of: \_\_\_\_\_ to \_\_\_\_\_

In accordance with governing board approval dated December 4, 2023.

Signature \_\_\_\_\_  
Clerk or Secretary of the Board

Typed Name Ray Avila, SBCSELPA Executive Director  
Clerk or Secretary of the Board

**NOTE:** Please TYPE name under signature.

<b>Column 1</b> Signatures of Members of the Governing Board
If the Board has given special instructions for signing warrants or orders, please attach a copy of the resolution to this form.
SIGNATURE
TYPED NAME Dr. Anne Hubbard
<b>President of the Board of Trustees/Education</b>
SIGNATURE
TYPED NAME Dr. Randal Haggard
<b>Vice President of the Board of Trustees/Education</b>
SIGNATURE
TYPED NAME Dr. Amy Alzina
<b>Clerk of the Board of Trustees/Education</b>
SIGNATURE
TYPED NAME Dr. Holly Edds
<b>Member of the Board of Trustees/Education</b>
SIGNATURE
TYPED NAME Antonio Garcia
<b>Member of the Board of Trustees/Education</b>
SIGNATURE
TYPED NAME Dr. Emilio Handall
<b>Member of the Board of Trustees/Education</b>
SIGNATURE
TYPED NAME Dr. Hilda Maldonado
<b>Member of the Board of Trustees/Education</b>

<b>Column 2</b> <b>Note for Escape Financial System Users:</b> The district must have an active employee with access to Escape in order to authorize accounts payable. This form is needed in order to grant activity permissions necessary to authorize payments in Escape.	Act as District Agent	Payments/Warrants	Payroll	Notices of Employment
SIGNATURE	✓	✓	✓	✓
TYPED NAME Ray Avila				
TITLE SBCSELPA Executive Director				
SIGNATURE	✓	✓	✓	✓
TYPED NAME Rachel Wigle				
TITLE SBCSELPA Chief Business Official				
SIGNATURE	✓	✓	✓	
TYPED NAME Lindsay MacDonald				
TITLE SBCSELPA Office Manager				
SIGNATURE	✓			
TYPED NAME Dr. Anne Hubbard				
TITLE SBCSELPA JPA Board Chairperson				
SIGNATURE		✓		
TYPED NAME Brian Helt				
TITLE SBCSELPA Executive Assistant				
SIGNATURE				
TYPED NAME				
TITLE				
SIGNATURE				
TYPED NAME				
TITLE <b>SECRETARY (per EC1010, the Superintendent)</b>				



Return completed original “wet” ink signature form to:  
School Business Advisory Services

**RESOLUTION OF THE GOVERNING BOARD  
DELEGATION OF GOVERNING BOARD POWERS DUTIES  
AUTHORITY TO MAKE CASH AND BUDGET TRANSFERS**

**Whereas,** Education Code Section 35161 provides that “The governing board of any school district may execute any powers delegated by law to it or to the district of which it is the governing board, and shall discharge any duty imposed by law upon it or upon the district of which it is the governing board...” and

**Whereas,** Education Code Section 35161 further provides that the governing board “...may delegate to an officer or employee of the district any of those powers or duties. The governing board, however, retains ultimate responsibility over the performance of those powers or duties so delegated;” and

**Whereas,** the governing board of the Santa Barbara County SELPA (SBCSELPA) recognizes that, while the authority provided in Education Code Section 35161 authorizes the board to delegate any of its powers and duties, the governing board retains the ultimate responsibility over the performance of those powers and duties; and

**Whereas,** the governing board further recognizes that where other Education Code provisions authorize a delegation of authority for a specific purpose, but impose restrictions on such delegated authority, these restrictions must be observed;

**Now, Therefore, Be It Resolved** that, in accordance with the authority provided in Education Code Section 35161, the governing board of the Santa Barbara County SELPA (SBCSELPA) hereby delegates to the following officers or employees of the district, the authority to make cash and budget transfers between and within district funds as necessary for the payment of obligations of the district effective from the date this resolution is passed through the year-end accrual phase without submitting the transfers as part of a specific board resolution.

**Ray Avila, SBCSELPA Executive Director**

Authorized District Employee/Officer

**Rachel Wigle, SBCSELPA Chief Business Official**

Authorized District Employee/Officer

Authorized District Employee/Officer

Authorized District Employee/Officer

**Passed and adopted** this 4th day of December, 2023 by the following vote:

**Ayes:**

**Noes:**

**Absent:**

**Abstain:**

**Board President’s Signature:** \_\_\_\_\_ Date: 12 / 04 / 2023

Note for Escape Financial System Users: The district must have an active employee with Escape access authorized to perform cash and budget transfers. This resolution is needed in order to grant activity permissions necessary to authorize certain budget and cash transfers (i.e., interfund cash transfers and deposits) in Escape.



# Presentation to JPA Board

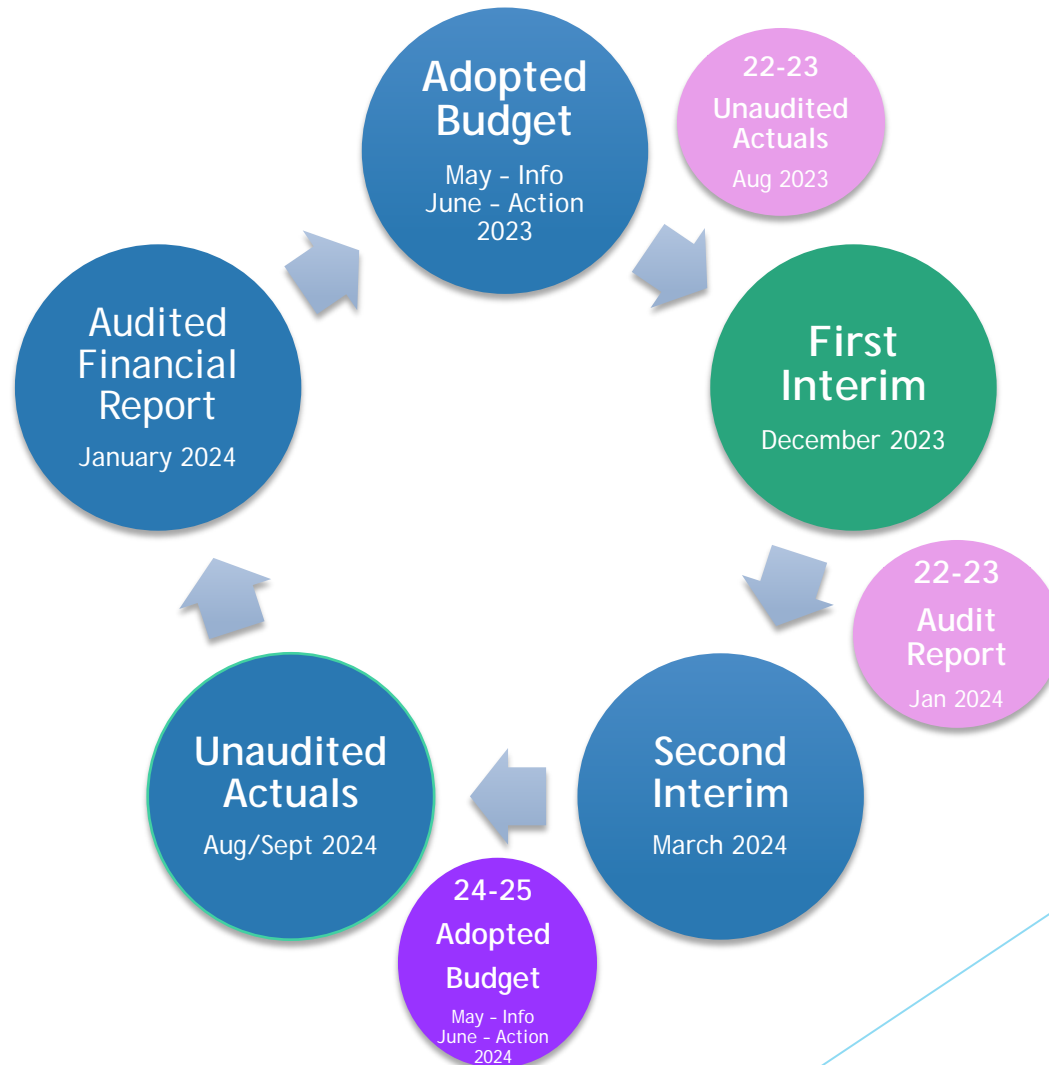
## First Interim Report for Fiscal Year 2023-24

December 4, 2023

Presented by Rachel Wigle  
SBCSELPA Chief Business Official



# Schedule of SELPA Budgets Reviews FY 23-24





# First Interim — What is it?



153

\_\_\_\_\_ — The SELPA **will** meet its financial obligations.

\_\_\_\_\_ — SELPA **may not** meet its financial obligations.

\_\_\_\_\_ — SELPA **will be unable to** meet its financial obligations.



# 22-23 First Interim

What is in it?	What has changed?
<p>Changes from Adopted Budget and Unaudited Actuals:</p> <ul style="list-style-type: none"> <li>Beginning Balances</li> <li>Revenues</li> <li>Expenditures (More below)</li> </ul>	<p><b>Beginning Balances</b></p> <ul style="list-style-type: none"> <li>Adjusted based on Unaudited Actuals</li> </ul>
<p>Updated Multi-Year Projections (MYP) for two subsequent years.</p>	<p><b>Revenues</b></p> <ul style="list-style-type: none"> <li>Updates for new revenues</li> <li>Utilized Ongoing Revenues for 24-25 and beyond instead of Ending Fund Balance.</li> </ul>
<p>New Expenditures based on:</p> <ul style="list-style-type: none"> <li>22-23 Ending Fund Balance Designations</li> </ul>	<p><b>Expenditures</b></p> <ul style="list-style-type: none"> <li>Updates for new expenditures</li> <li>Ending Fund Balance Designations</li> </ul>



# FY22-23 Ending Fund Balance applied to FY23-24 First Interim Budget

## Non-Mental Health FY 22-23 Designated Ending Fund Balance:

		Effect on 1st Interim:
Regional Program Facilities Deferred Maintenance	-	
Potential Medical Therapy Unit (MTU) Site Replacement (Lompoc area)	250,000	R
Deferred Maintenance 23-24 per June 2023 Board Meeting	12,000	E
Low Incidence equipment, materials, services funding carryover	600,770	E
SELPA-Wide Staff Development Carryover--recommended to use to make most PD's free to LEAs	31,000	
Crisis Prevention Intervention (CPI) for Free SELPA-Wide Staff Development	9,000.00	E
CPI Staff Development Reserve	4,350.00	R
CPI Total	13,350	
SELPA Legal Reserve	307,637	R/A
Medical Administrative Activities (MAA) Funding for SELPA	44,500	BB/R
Self Insurance Program for Employees (SIPE) Rebate for SELPA	35,245	R
Economic Uncertainty - Cash Reserve 5%	260,000	R
Legal Fee Allocations to LEAs	200,000	E*
Legal Fee Carryover Allocation - distributed to LEAs	99,673	E
Replenish regional program facilities deferred maintenance reserve (Target = \$75,000)	38,000	R/A
Replenish SELPA Legal Reserve (Target = \$325,000)	17,363	R/A
Mental Health Services and Non Public School Cost Pool per 2023-24 Adopted Budget	344,652	A**
Undesignated reserve for unanticipated expenses (including NPS costs), decreases in revenue, cash flow, and future designation by the board.	127,117	R*
<b>Total</b>	<b>\$ 2,381,307</b>	

## Mental Health FY 22-23 Designated Ending Fund Balance:

Mental Health Services and Non Public School Cost Pool per 2023-24 Adopted Budget	<b>\$ 1,352,425</b>	<b>A**</b>
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**Total 2022-23 SBCSELPA Ending Fund Balance added at First Interim** **\$ 3,733,732**

*\*Legal Fee Allocations reduced by \$327, SB-PIC Beginning Balance Added  
Changes offset in Undesignated Reserve*

*\*\*Total Ending Fund Balance used for 23-24 Mental Health & NPS Pools*

Key: Affect on 1st Interim  
BB=Beginning Balance  
R=Reserve  
E=Expense  
A=Already in Adopted



			23-24	23-24	Change from Prior	Explanations and Notes
			Adopted Budget	First Interim Budget		
<b>Beginning Balance</b>			<b>2,759,402</b>	<b>3,733,732</b>		
<b>Revenue:</b>						
Fund 01	Federal Revenue	8100-8299	29,955	29,955	-	
	State Revenue	8300-8599	5,383,074	5,376,257	(6,817)	Reduced for STRS On Behalf
	Local Revenue	8600-8799	351,740	520,802	169,062	Added Fair-Market Value Reversal & Grad Student Researchers
	s/total Revenue Fund 01		5,764,769	5,927,014	162,245	
Fund 10	Federal Revenue	8100-8299	13,913,183	19,555,523	5,642,340	
	State Revenue	8300-8599	35,863,321	34,846,715	(1,016,606)	
	Local Revenue	8600-8799	-	-	-	
	s/total Revenue Fund 10		49,776,504	54,402,238	4,625,734	
<b>Expenditures:</b>						
Fund 01	Certificated	1000-1999	377,329	377,329	-	
	Classified	2000-2999	761,431	761,431	-	
	Benefits	3000-3999	413,617	399,047	(14,570)	Reduced Statutory Costs
	Books & Supplies	4000-4999	198,910	199,908	998	
	Services & Other	5000-5999	3,357,491	3,422,677	65,186	
	Capital outlay	6000-6999	-	-	-	
	Other Outgo	7000-7399	2,191,164	3,084,628	893,464	Increase for EFB Transfers to LEAs
	s/total Expenditures Fund 01		7,299,942	8,245,020	945,078	
Fund 10	Transfer for Fed & State Expenditures		49,776,504	54,402,238	4,625,734	Increased for prior year carryover for grants not reported or expended by June 30th
					-	
<b>Ending Balance June 30</b>			<b>1,224,230</b>	<b>1,415,727</b>	<b>191,497</b>	
<b>Reserves:</b>						
	SELPA Designated Legal Reserve		325,000	300,000	(25,000)	Moved to Budget
	MTU Site Improvement Fund Reserve		250,000	250,000	-	
	Regional Deferred Maintenance reserve		50,000	38,000	(12,000)	Moved to Budget
	SIPE Rebate		35,246	35,245	(1)	
	MAA Reserve		45,883	35,000	(10,883)	Revised 22-23 UA EFB
	Set aside for Economic Contingencies		150,000	260,000	110,000	
	Ending Fund Balance Reserve		150,000		(150,000)	
	Fair Market Value Set-aside			140,000	140,000	Offsets Revenue Increase
	NPS Reserve			200,000	200,000	Restore part of NPS Pool (Originally reduced by \$300,000)
	Professional Development Carryover		19,449	18,576	(873)	
	s/total Designated		1,025,578	1,276,821	251,243	
	Unassigned		1,850,672	138,906	(1,711,766)	

**Object 5000 Changes Itemized:**

Legal (From Reserve))	\$ 25,000
Staff Development (from 7000s & Can	39,315
Deferred Maintenance (JPA Approved)	12,000
WRAP (savings)	(32,000)
MTU (Shed & Phone)	6,660
Grad Student Researchers	12,838
SB-PIC	1,373
	\$ 65,186

**7000 Changes Itemized)**

Legal	299,673
Low Incidence	601,606
Staff Development (moved to 5XXX)	\$ (7,815)
	\$ 893,464

# Multi-Year Projection

- ▶ Moved \$750,000 from Fund 10 to Fund 01 for Mental Health/NPS in 24-25 and additional \$74,000 in 25-26



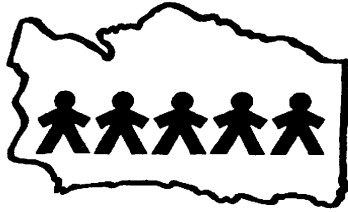
				FY 21-22				FY 22-23				FY 23-24			
				Adopted Budget	First Interim	Second Interim	Unaudited Actuals	Adopted Budget "B"	First Interim	Second Interim	Unaudited Actuals	Adopted Budget	First Interim	Multi-Year Projection 24-25 25-26	
Beginning Balance				2,747,052	4,353,741	4,353,741	4,353,741	3,409,294	4,091,908	4,487,245	4,487,245	2,759,402	3,733,732	1,415,727	1,324,553
Revenue:															
Fund 01	Federal Revenue	8100-8299		862,683	877,284	877,284	863,656	33,360	802,401	802,401	786,929	29,955	29,955	779,955	853,955
	State Revenue	8300-8599		2,063,763	5,865,417	5,985,406	5,300,003	5,105,994	5,708,185	5,949,744	6,850,537	5,383,074	5,376,257	5,393,999	5,466,015
	Local Revenue	8600-8799		3,948,143	527,466	632,101	641,599	528,745	420,253	572,072	641,603	351,740	520,802	375,074	375,074
	s/total Revenue Fund 01			6,874,589	7,270,167	7,494,791	6,805,258	5,668,099	6,930,839	7,324,217	8,279,069	5,764,769	5,927,014	6,549,028	6,695,044
Fund 10	Federal Revenue	8100-8299		13,054,980	19,770,017	23,085,085	21,725,587	13,670,137	17,808,674	17,808,674	13,151,725	13,913,183	19,555,523	18,805,523	18,805,523
	State Revenue	8300-8599		28,458,328	37,636,139	38,698,860	35,704,299	36,498,101	39,583,047	39,583,047	38,994,512	35,863,321	34,846,715	34,846,715	34,846,715
	Local Revenue	8600-8799					1,910				(1,822)				
	s/total Revenue Fund 10			41,513,308	57,406,156	61,783,945	57,429,886	50,168,238	57,391,721	57,391,721	52,144,415	49,776,504	54,402,238	54,402,238	54,402,238
Expenditures:															
	Certificated	1000-1999		344,058	354,352	354,352	354,353	357,889	357,889	377,328	377,328	377,329	377,329	377,329	377,329
	Classified	2000-2999		737,539	806,599	776,663	781,346	764,928	822,035	866,278	866,513	761,431	761,431	766,701	772,032
	Benefits	3000-3999		372,194	375,012	394,133	398,018	389,470	428,080	433,312	394,378	413,617	399,047	404,599	410,661
	Books & Supplies	4000-4999		190,353	228,771	228,771	39,351	198,710	198,710	208,246	48,105	198,910	199,908	200,538	201,228
	Services & Other	5000-5999		3,403,360	4,167,122	4,259,460	1,798,215	2,122,483	4,103,763	3,998,246	2,299,653	3,357,491	3,422,677	3,656,900	3,711,654
	Capital outlay	6000-6999		5,390	18,760	18,760	-	-	-	-	-	-	-	-	-
	Other Outgo	7000-7399		1,682,903	4,625,295	4,849,152	3,695,809	1,774,674	4,299,075	4,415,503	5,046,603	2,191,164	3,084,628	1,234,135	1,234,135
	s/total Expenditures Fund 01			6,735,797	10,575,911	10,881,291	7,067,091	5,608,154	10,209,552	10,298,913	9,032,580	7,299,942	8,245,020	6,640,202	6,707,039
Fund 10	Transfer for Fed & State Expenditures			41,513,308	57,406,156	61,783,945	57,431,796	50,168,238	57,391,721	57,391,721	52,144,415	49,776,504	54,402,238	54,402,238	54,402,238
Ending Balance June 30				2,885,844	1,047,997	967,241	4,091,908	3,469,239	813,195	1,512,549	3,733,732	1,224,230	1,415,727	1,324,553	1,312,558
Designated from Fund Balance:															
Board Approved Reserves:															
	SELPA Designated Legal Reserve			325,000	325,000	325,000	325,000	325,000	325,000	325,000	325,000	325,000	300,000	300,000	300,000
	MTU Site Improvement Fund Reserve			250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000
	Regional Deferred Maintenance reserve			50,000	50,000	50,000	75,000	50,000	-	38,000	38,000	50,000	38,000	50,000	50,000
	MAA Reserve							20,882	31,619	41,719	44,500	45,883	35,000	25,500	16,000
	SIPE Rebate			37,246	35,246	35,246	35,246	35,246	35,246	35,246	35,246	35,246	35,245	35,246	35,246
	5% Set aside for Economic Contingencies			105,648	150,000	150,000	150,000	150,000	155,000	300,000	260,000	150,000	260,000	260,000	260,000
	Fair Market Value EFB Set-Aside												140,000	140,000	140,000
	NPS Reserve												200,000		
	Non-MH EFB Reserve				100,000	100,000						150,000		150,000	150,000
	MH EFB Reserve				100,000	100,000									
	Ending Fund Balance for Adopted Budget										1,697,077				
							21-22 EFB Board Approved increases 22-23 First Interim:				22-23 EFB Board Approved increases 22-23 First Interim:				
	Low Incidence Carryover						227,372				600,770				
	LEA Legal fees carryover						99,672				99,673				
	LEA Legal fees						300,000				200,000				
	Deferred Maintenance										12,000				
	SELPA-Wide Staff Development Carryover						31,449				31,000	19,449			
	Non-MH EFB to districts						723,666								
	MH EFB carryover to districts						1,652,020								
	CPI carryover			23,219	-		3,677				13,350		18,576		
	MAA Carryover						41,119						4,569		
	SB-PIC														
	Sped Alternative Dispute Resolution						177,686								
	total designated			791,113	1,010,246	1,010,246	4,091,908	831,128	796,865	951,965	3,606,616	1,025,578	1,281,390	1,210,746	1,201,246
	Unassigned			2,094,731	37,751	(43,005)	0	2,638,111	16,330	560,584	127,116	198,652	134,337	113,807	111,312



# QUESTIONS? COMMENTS?

Thank you!





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

Date: December 4, 2023

To: SBCSELPA JPA Board

From: Ray Avila, SBCSELPA Executive Director

Re: Certification of First Period Interim Report for the Fiscal Year 2023-2024

**BACKGROUND:**

The proposed first interim budget for 2023-2024 includes the following information:

➤ **Revenue Accounts**

- **8100-8299** – Federal Preschool Staff Development, Preschool Regionalized Services, Alternate Dispute Resolution
- **8300-8599** – AB 602 Funding including 8.22% COLA for 23-24, 1% in 24-25, 1% in 25-26 & STRS On-Behalf
- **8600-8799** - Interest and District payments for services provided

➤ **Expenditure Accounts**

- No COLA was applied to Certificated and/or Classified salaries in 23-24, 23-24 and 24-25 for the multi-year projections. Step and Column increases were applied where appropriate.
- 10% was applied to health and welfare benefits for the multi-year projections based on prior history of increases.
- Consumer Price Index (CPI) was applied to the two subsequent years for applicable supplies
- One-time increases from 2022-23 ending fund balances were made in the 4000s & 5000s in 2023-24 budget:
  - \$31,000 – PD Carryover
  - \$12,000 – Deferred Maintenance
- One-time increases from 2022-23 ending fund balances were made in the 7000's in 2023-2024 budget to be spent in full with no carryover in subsequent years:
  - \$600,777 – Low Incidence Allocation to LEAs
  - \$299,673 – District Legal Carryover and Allocation



➤ **Fund Balance**

- The Ending Fund Balance for 2023-2024 and two subsequent years show the SBCSELPA meeting the required 5% minimum reserve for Economic Uncertainties. The SBCSELPA 5% Economic Uncertainties calculation is based on expenditures in the SBCSELPA budget excluding 7000 transfers as these funds do not have a requirement for economic uncertainties.
- Ending Fund Balance Components:
 

▪ 5% Economic Uncertainties*:	\$ 260,000
▪ MTU Site improvement (prior to reduction):	\$ 250,000
▪ SELPA Legal Reserve:	\$ 300,000
○ Reduced from \$325,000 as \$25,000 was moved to budget	
▪ Deferred Maintenance Reserve	\$ 38,000
▪ SIPE & MAA Reserve	\$ 70,245
▪ Fair Market Value Reserve	\$ 140,000
▪ Non Public School Reserve	\$ 200,000

\*This has increased from prior years in which Mental Health expenditures were not included in the calculation.

➤ **Criteria and Standards Review Summary for Items:**

- Revenues & Expenditures for multi-year projections – Formerly planned to increase AB602 in 24-25 and 25-26 to meet NPS Pool and Mental Health Services funding needs, now shifting to utilizing Federal funds, and repurposing \$950,000 of Out-of-Home Care (reduction from object 7000 expenditures). This results in a -\$1.7 million shift in funding sources for 24-25. Additional federal funds added in 25-26 to off set rising costs due to Step & Column and CPI outpacing projected COLA.
- Deficit Spending – Recognition of prior year carryover items (as referenced above) for expenditures causes the SELPA to appear to be deficit spending. These items were all identified in the Unaudited Actuals report as part of the ending fund balance to be budgeted at First Interim for expenditure.
- 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 AB602 funding is all accounted for in Reserve 6500 and is therefore used to meet reserve requirements.

**RECOMMENDATION:** The JPA Board certify the First Period Interim Report for the Fiscal Year 2023-24 as presented.

RA:rw

**Santa Barbara County SELPA**  
**FY 23-24 Adopted Budget Compared to FY 23-24 First Interim Budget**

			23-24	23-24	Change from Prior	Explanations and Notes
			Adopted Budget	First Interim Budget		
Beginning Balance			2,759,402	3,733,732		
Revenue:					-	
Fund 01	Federal Revenue	8100-8299	29,955	29,955	-	
	State Revenue	8300-8599	5,383,074	5,376,257	(6,817)	Reduced for STRS On Behalf
	Local Revenue	8600-8799	351,740	520,802	169,062	Added Fair-Market Value Reversal & Grad Student Researchers
	s/total Revenue Fund 01		5,764,769	5,927,014	162,245	
					-	
Fund 10	Federal Revenue	8100-8299	13,913,183	19,555,523	5,642,340	<b>Object 5000 Changes Itemized:</b> Legal (From Reserve)) \$ 25,000 Staff Development (from 7000s & Carr. 39,315 Deferred Maintenance (JPA Approved) 12,000 WRAP (savings) (32,000) MTU (Shed & Phone) 6,660 Grad Student Researchers 12,838 SB-PIC 1,373
	State Revenue	8300-8599	35,863,321	34,846,715	(1,016,606)	
	Local Revenue	8600-8799	-	-	-	
	s/total Revenue Fund 10		49,776,504	54,402,238	4,625,734	
					-	
Expenditures:					-	
Fund 01	Certificated	1000-1999	377,329	377,329	-	
	Classified	2000-2999	761,431	761,431	-	
	Benefits	3000-3999	413,617	399,047	(14,570)	Reduced Statutory Costs
	Books & Supplies	4000-4999	198,910	199,908	998	
	Services & Other	5000-5999	3,357,491	3,422,677	65,186	
	Capital outlay	6000-6999	-	-	-	
	Other Outgo	7000-7399	2,191,164	3,084,628	893,464	Increase for EFB Transfers to LEAs
	s/total Expenditures Fund 01		7,299,942	8,245,020	945,078	
					-	
Fund 10	Transfer for Fed & State Expenditures		49,776,504	54,402,238	4,625,734	Increased for prior year carryover for grants not reported or expended by June 30th
					-	
Ending Balance June 30			1,224,230	1,415,727	191,497	
Reserves:						
SELPA Designated Legal Reserve			325,000	300,000	(25,000)	Moved to Budget
MTU Site Improvement Fund Reserve			250,000	250,000	-	
Regional Deferred Maintenance reserve			50,000	38,000	(12,000)	Moved to Budget
SIPE Rebate			35,246	35,245	(1)	
MAA Reserve			45,883	35,000	(10,883)	Revised 22-23 UA EFB
Set aside for Economic Contingencies			150,000	260,000	110,000	
Ending Fund Balance Reserve			150,000		(150,000)	
Fair Market Value Set-aside				140,000	140,000	Offsets Revenue Increase
NPS Reserve				200,000	200,000	Restore part of NPS Pool (Originally reduced by \$300,000)
Professional Development Carryover			19,449	18,576	(873)	
s/total Designated			1,025,578	1,276,821	251,243	
Unassigned			1,850,672	138,906	(1,711,766)	

**Object 5000 Changes Itemized:**

Legal (From Reserve))	\$	25,000
Staff Development (from 7000s & Carr)		39,315
Deferred Maintenance (JPA Approved)		12,000
WRAP (savings)		(32,000)
MTU (Shed & Phone)		6,660
Grad Student Researchers		12,838
SB-PIC		1,373
	\$	65,186

**7000 Changes Itemized)**

Legal		299,673
Low Incidence		601,606
Staff Development (moved to 5XXX)	\$	(7,815)
	\$	893,464

**Santa Barbara County SELPA**  
**2023-24 First Interim Budget With Multi-Year Projection**

					FY 21-22				FY 22-23				FY 23-24			
					Adopted Budget	First Interim	Second Interim	Unaudited Actuals	Adopted Budget "B"	First Interim	Second Interim	Unaudited Actuals	Adopted Budget	First Interim	Multi-Year Projection 24-25 25-26	
<b>Beginning Balance</b>					2,747,052	4,353,741	4,353,741	4,353,741	3,409,294	4,091,908	4,487,245	4,487,245	2,759,402	3,733,732	1,415,727	1,324,553
<b>Revenue:</b>																
Fund 01	Federal Revenue	8100-8299			862,683	877,284	877,284	863,656	33,360	802,401	802,401	786,929	29,955	29,955	779,955	853,955
	State Revenue	8300-8599			2,063,763	5,865,417	5,985,406	5,300,003	5,105,994	5,708,185	5,949,744	6,850,537	5,383,074	5,376,257	5,393,999	5,466,015
	Local Revenue	8600-8799			3,948,143	527,466	632,101	641,599	528,745	420,253	572,072	641,603	351,740	520,802	375,074	375,074
	s/total Revenue Fund 01				6,874,589	7,270,167	7,494,791	6,805,258	5,668,099	6,930,839	7,324,217	8,279,069	5,764,769	5,927,014	6,549,028	6,695,044
Fund 10	Federal Revenue	8100-8299			13,054,980	19,770,017	23,085,085	21,725,587	13,670,137	17,808,674	17,808,674	13,151,725	13,913,183	19,555,523	18,805,523	18,805,523
	State Revenue	8300-8599			28,458,328	37,636,139	38,698,860	35,704,299	36,498,101	39,583,047	39,583,047	38,994,512	35,863,321	34,846,715	34,846,715	34,846,715
	Local Revenue	8600-8799					1,910					(1,822)				
	s/total Revenue Fund 10				41,513,308	57,406,156	61,783,945	57,429,886	50,168,238	57,391,721	57,391,721	52,144,415	49,776,504	54,402,238	54,402,238	54,402,238
<b>Expenditures:</b>																
	Certificated	1000-1999			344,058	354,352	354,352	354,353	357,889	357,889	377,328	377,328	377,329	377,329	377,329	377,329
	Classified	2000-2999			737,539	806,599	776,663	781,346	764,928	822,035	866,278	866,513	761,431	761,431	766,701	772,032
	Benefits	3000-3999			372,194	375,012	394,133	398,018	389,470	428,080	433,312	394,378	413,617	399,047	404,599	410,661
	Books & Supplies	4000-4999			190,353	228,771	228,771	39,351	198,710	198,710	208,246	48,105	198,910	199,908	200,538	201,228
	Services & Other	5000-5999			3,403,360	4,167,122	4,259,460	1,798,215	2,122,483	4,103,763	3,998,246	2,299,653	3,357,491	3,422,677	3,656,900	3,711,654
	Capital outlay	6000-6999			5,390	18,760	18,760	-	-	-	-	-	-	-	-	-
	Other Outgo	7000-7399			1,682,903	4,625,295	4,849,152	3,695,809	1,774,674	4,299,075	4,415,503	5,046,603	2,191,164	3,084,628	1,234,135	1,234,135
	s/total Expenditures Fund 01				6,735,797	10,575,911	10,881,291	7,067,091	5,608,154	10,209,552	10,298,913	9,032,580	7,299,942	8,245,020	6,640,202	6,707,039
Fund 10	Transfer for Fed & State Expenditures				41,513,308	57,406,156	61,783,945	57,431,796	50,168,238	57,391,721	57,391,721	52,144,415	49,776,504	54,402,238	54,402,238	54,402,238
<b>Ending Balance June 30</b>					2,885,844	1,047,997	967,241	4,091,908	3,469,239	813,195	1,512,549	3,733,732	1,224,230	1,415,727	1,324,553	1,312,558
Designated from Fund Balance:																
Board Approved Reserves:																
	SELPA Designated Legal Reserve				325,000	325,000	325,000	325,000	325,000	325,000	325,000	325,000	325,000	300,000	300,000	300,000
	MTU Site Improvement Fund Reserve				250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000
	Regional Deferred Maintenance reserve				50,000	50,000	50,000	75,000	50,000	-	38,000	38,000	50,000	38,000	50,000	50,000
	MAA Reserve							20,882	31,619	41,719	44,500	45,883	35,000	35,000	25,500	16,000
	SIPE Rebate				37,246	35,246	35,246	35,246	35,246	35,246	35,246	35,246	35,246	35,245	35,246	35,246
	5% Set aside for Economic Contingencies				105,648	150,000	150,000	150,000	150,000	155,000	300,000	260,000	150,000	260,000	260,000	260,000
	Fair Market Value EFB Set-Aside													140,000	140,000	140,000
	NPS Reserve													200,000		
	Non-MH EFB Reserve					100,000	100,000						150,000		150,000	150,000
	MH EFB Reserve					100,000	100,000									
	Ending Fund Balance for Adopted Budget											1,697,077				
					21-22 EFB Board Approved increases 22-23 First Interim:				22-23 EFB Board Approved increases 22-23 First Interim:							
	Low Incidence Carryover							227,372				600,770				
	LEA Legal fees carryover							99,672				99,673				
	LEA Legal fees							300,000				200,000				
	Deferred Maintenance											12,000				
	SELPA-Wide Staff Development Carryover							31,449				31,000	19,449			
	Non-MH EFB to districts							723,666								
	MH EFB carryover to districts							1,652,020								
	CPI carryover				23,219	-		3,677				13,350		18,576		
	MAA Carryover							41,119								
	SB-PIC													4,569		
	Sped Alternative Dispute Resolution							177,686								
	total designated				791,113	1,010,246	1,010,246	4,091,908	831,128	796,865	951,965	3,606,616	1,025,578	1,281,390	1,210,746	1,201,246
	Unassigned				2,094,731	37,751	(43,005)	0	2,638,111	16,330	560,584	127,116	198,652	134,337	113,807	111,312

**Multi-Year Projections Assumptions  
2023-24 Adopted Budget**

				Change from prior year	
				\$	\$
				24-25	25-26
<b>REVENUE</b>					
<b>Fund 01</b>					
8100-8299	Add \$750,000 of Federal funding for NPS Placements in 24-25 & \$86,000 in 25-26			750,000	\$ 74,000
8300-8599	AB602 Funding			1.00%	1.00%
	AB602 Off-the-Top SE AB602 Off-the-Top SELPA COLA			14,872	15,021
					0
		AB602 change every two years to pay for CPI with off the top AB602 funds		(25,000)	25,000
		Mental Health Increase for SELPA Staff & WRAP		27,871	31,995
		s/total State Revenue		17,743	72,016
8699	Kept Local Funding flat				
	Reduce for FMV Adjustment			(139,228)	
	Reduce for Contract to SLO			(6,500)	0
		s/total Local Revenue		(145,728)	0
		Fund 01 Total		622,015	146,016
<b>EXPENSES</b>					
<b>Fund 01</b>					
		1.021059696			
1xxx's	no increases projected	1.023149359		0	0
2xxx's		Step and Column increases ONLY; No raises		5,270	5,331
3xxx's	+10% to H&W both years, statutory benefits for increase to step-column			5,552	6,062
4xxx's	Increase for cost of supplies California Consumer Price Index (CA CPI)				
	for 24-25	2.10%	for 25-26 2.30%	630	690
5xxx's	Added CA CPI increase in applicable expenses for both years			8,723	9,754
	Prof Dev	CPI Expenses change every other year		(25,000)	25,000
	Prof Dev	EFB Expenses		(31,000)	0
	Restore NPS Balance			300,000	0
	Deferred Maintenance			(12,000)	
	WRAP Staff Step & Column - no vacancies; Year 1 Savings due to No Hiring Costs			0	20,000
	MTU Shed			(6,500)	0
		s/total 5xxx		234,223	54,754
6xxx's	Capital			0	0
7xxx's	Remove \$950,000 Transfer to LEA for Out-of-Home Care, Utilize for NPS Placement			(950,000)	-
	Remove 1x Legal EFB Transfer			(299,793)	-
	Remove 1x Low Incidence Carryover EFB Transfer			(600,700)	
					-
		s/total		(1,850,493)	0
		Fund 01 Total		(1,604,818)	66,837

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: December 04, 2023

Signed: \_\_\_\_\_  
President of the Governing Board

#### CERTIFICATION OF FINANCIAL CONDITION

☒ 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: Rachel Wigle

Telephone: (805) 979-2135

Title: Chief Business Official

E-mail: rwigle@sbcsepa.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 budget adoption.		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 budget adoption.	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 budget adoption 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 budget adoption by more than five percent?	X	

First Interim  
JPA CERTIFICATION OF INTERIM REPORT  
For the Fiscal Year 2023-24

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 budget adoption by more than \$20,000 and more than 5% for any of the current or two subsequent fiscal years?		X
<b>SUPPLEMENTAL INFORMATION (continued)</b>			<b>No</b>	<b>Yes</b>
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 (2022-23) 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 budget adoption 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 budget adoption in self-insurance liabilities?	n/a	
S8	Status of Labor Agreements	As of first interim projections, are salary and benefit negotiations still unsettled for:		
		• Certificated? (Section S8A, Line 1b)	n/a	
		• Classified? (Section S8B, Line 1b)	n/a	
		• Management/supervisor/confidential? (Section S8C, Line 1b)	X	
S9	Status of Other Funds	Are any funds other than the general fund projected to have a negative fund balance at the end of the current fiscal year?	X	
<b>ADDITIONAL FISCAL INDICATORS</b>			<b>No</b>	<b>Yes</b>
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)
<b>A. REVENUES</b>								
1) LCFF Sources		8010-8099	0.00	0.00	0.00	0.00	0.00	0.0%
2) Federal Revenue		8100-8299	29,955.00	29,955.00	15,778.85	29,955.00	0.00	0.0%
3) Other State Revenue		8300-8599	5,383,074.00	5,383,074.00	1,501,024.00	5,376,257.00	(6,817.00)	-0.1%
4) Other Local Revenue		8600-8799	351,740.00	351,740.00	147,852.04	520,802.00	169,062.00	48.1%
5) TOTAL, REVENUES			5,764,769.00	5,764,769.00	1,664,654.89	5,927,014.00		
<b>B. EXPENDITURES</b>								
1) Certificated Salaries		1000-1999	377,328.84	377,328.84	125,776.28	377,328.84	0.00	0.0%
2) Classified Salaries		2000-2999	761,430.90	761,430.90	253,810.30	761,430.90	0.00	0.0%
3) Employee Benefits		3000-3999	413,614.44	413,614.44	149,764.07	399,046.00	14,568.44	3.5%
4) Books and Supplies		4000-4999	198,908.00	198,908.00	7,057.77	199,908.00	(1,000.00)	-0.5%
5) Services and Other Operating Expenditures		5000-5999	3,357,491.00	3,357,491.00	645,662.48	3,422,677.00	(65,186.00)	-1.9%
6) Capital Outlay		6000-6999	0.00	0.00	0.00	0.00	0.00	0.0%
7) Other Outgo (excluding Transfers of Indirect Costs)	7100-7299,7400-7499		2,191,167.00	2,191,167.00	(684,997.64)	3,084,628.00	(893,461.00)	-40.8%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	0.00	0.00	0.00	0.00	0.00	0.0%
9) TOTAL, EXPENDITURES			7,299,940.18	7,299,940.18	497,073.26	8,245,018.74		
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)</b>			(1,535,171.18)	(1,535,171.18)	1,167,581.63	(2,318,004.74)		
<b>D. OTHER FINANCING SOURCES/USES</b>								
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		
<b>E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)</b>			(1,535,171.18)	(1,535,171.18)	1,167,581.63	(2,318,004.74)		
<b>F. FUND BALANCE, RESERVES</b>								
1) Beginning Fund Balance								
a) As of July 1 - Unaudited		9791	2,759,399.62	2,759,399.62		3,733,731.93	974,332.31	35.3%
b) Audit Adjustments		9793	0.00	0.00		0.00	0.00	0.0%
c) As of July 1 - Audited (F1a + F1b)			2,759,399.62	2,759,399.62		3,733,731.93		
d) Other Restatements		9795	0.00	0.00		0.00	0.00	0.0%
e) Adjusted Beginning Balance (F1c + F1d)			2,759,399.62	2,759,399.62		3,733,731.93		
2) Ending Balance, June 30 (E + F1e)			1,224,228.44	1,224,228.44		1,415,727.19		
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	770,031.70	770,031.70		971,470.98		

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)
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	454,196.74	454,196.74		444,256.21		
<b>FEDERAL REVENUE</b>								
Special Education Discretionary Grants		8182	29,955.00	29,955.00	15,778.85	29,955.00	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			29,955.00	29,955.00	15,778.85	29,955.00	0.00	0.0%
<b>OTHER STATE REVENUE</b>								
Other State Apportionments								
All Other State Apportionments - Current Year		8311	5,340,501.00	5,340,501.00	1,501,024.00	5,340,566.00	65.00	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	42,573.00	42,573.00	0.00	35,691.00	(6,882.00)	-16.2%
TOTAL, OTHER STATE REVENUE			5,383,074.00	5,383,074.00	1,501,024.00	5,376,257.00	(6,817.00)	-0.1%
<b>OTHER LOCAL REVENUE</b>								
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	25,000.00	25,000.00	23,420.18	25,000.00	0.00	0.0%
Net Increase (Decrease) in the Fair Value of Investments		8662	0.00	0.00	139,228.00	139,228.00	139,228.00	New
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								



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)
Pass-Through Revenues From Local Sources		8697	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Local Revenue		8699	326,740.00	326,740.00	(14,796.14)	356,574.00	29,834.00	9.1%
Tuition		8710	0.00	0.00	0.00	0.00	0.00	0.0%
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	0.00	0.00	0.00	0.00	0.00	0.0%
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	0.00	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			351,740.00	351,740.00	147,852.04	520,802.00	169,062.00	48.1%
TOTAL, REVENUES			5,764,769.00	5,764,769.00	1,664,654.89	5,927,014.00		
<b>CERTIFICATED SALARIES</b>								
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	312,596.04	312,596.04	104,198.68	312,596.04	0.00	0.0%
Other Certificated Salaries		1900	64,732.80	64,732.80	21,577.60	64,732.80	0.00	0.0%
TOTAL, CERTIFICATED SALARIES			377,328.84	377,328.84	125,776.28	377,328.84	0.00	0.0%
<b>CLASSIFIED SALARIES</b>								
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	136,752.00	136,752.00	45,584.00	136,752.00	0.00	0.0%
Other Classified Salaries		2900	624,678.90	624,678.90	208,226.30	624,678.90	0.00	0.0%
TOTAL, CLASSIFIED SALARIES			761,430.90	761,430.90	253,810.30	761,430.90	0.00	0.0%
<b>EMPLOYEE BENEFITS</b>								
STRS		3101-3102	114,642.81	114,642.81	24,023.32	107,760.80	6,882.01	6.0%
PERS		3201-3202	106,874.59	106,874.59	64,244.20	106,150.58	724.01	0.7%
OASDI/Medicare/Alternative		3301-3302	16,487.03	16,487.03	5,491.64	16,519.36	(32.33)	-0.2%
Health and Welfare Benefits		3401-3402	163,261.80	163,261.80	53,600.39	161,369.50	1,892.30	1.2%
Unemployment Insurance		3501-3502	5,685.17	5,685.17	184.97	569.64	5,115.53	90.0%
Workers' Compensation		3601-3602	6,663.04	6,663.04	2,219.55	6,676.12	(13.08)	-0.2%
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			413,614.44	413,614.44	149,764.07	399,046.00	14,568.44	3.5%
<b>BOOKS AND SUPPLIES</b>								

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)
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	192,908.00	192,908.00	7,057.77	193,908.00	(1,000.00)	-0.5%
Noncapitalized Equipment		4400	6,000.00	6,000.00	0.00	6,000.00	0.00	0.0%
Food		4700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, BOOKS AND SUPPLIES			198,908.00	198,908.00	7,057.77	199,908.00	(1,000.00)	-0.5%
<b>SERVICES AND OTHER OPERATING EXPENDITURES</b>								
Subagreements for Services		5100	25,000.00	25,000.00	12,838.86	37,838.00	(12,838.00)	-51.4%
Travel and Conferences		5200	131,000.00	131,000.00	29,947.16	131,000.00	0.00	0.0%
Dues and Memberships		5300	5,100.00	5,100.00	3,602.44	5,100.00	0.00	0.0%
Insurance		5400-5450	6,100.00	6,100.00	6,320.00	6,100.00	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	77,353.00	77,353.00	23,080.68	77,353.00	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	3,087,828.00	3,087,828.00	565,026.26	3,140,016.00	(52,188.00)	-1.7%
Communications		5900	25,110.00	25,110.00	4,847.08	25,270.00	(160.00)	-0.6%
TOTAL, SERVICES AND OTHER OPERATING EXPENDITURES			3,357,491.00	3,357,491.00	645,662.48	3,422,677.00	(65,186.00)	-1.9%
<b>CAPITAL OUTLAY</b>								
Land		6100	0.00	0.00	0.00	0.00	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%
Lease Assets		6600	0.00	0.00	0.00	0.00	0.00	0.0%
Subscription Assets		6700	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, CAPITAL OUTLAY			0.00	0.00	0.00	0.00	0.00	0.0%
<b>OTHER OUTGO (excluding Transfers of Indirect Costs)</b>								
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%

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)
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	2,161,167.00	2,161,167.00	(684,997.64)	3,054,628.00	(893,461.00)	-41.3%
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)			2,191,167.00	2,191,167.00	(684,997.64)	3,084,628.00	(893,461.00)	-40.8%
<b>OTHER OUTGO - TRANSFERS OF INDIRECT COSTS</b>								
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			7,299,940.18	7,299,940.18	497,073.26	8,245,018.74		
<b>INTERFUND TRANSFERS</b>								
<b>INTERFUND TRANSFERS IN</b>								
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%
<b>INTERFUND TRANSFERS OUT</b>								
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%
<b>OTHER SOURCES/USES</b>								
<b>SOURCES</b>								
Long-Term Debt Proceeds								
Proceeds from Certificates of Participation		8971	0.00	0.00	0.00	0.00	0.00	0.0%
Proceeds from 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%
Proceeds from SBITAs		8974	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%
<b>USES</b>								
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%
<b>CONTRIBUTIONS</b>								
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%

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)
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

2023-24 First Interim  
 General Fund / County School Service Fund  
 Restricted Detail

42403780000000  
 Form 011  
 E81A8TT2HP(2023-24)

Resource	Description	2023-24 Projected Totals
6500	Special Education	971,470.98
Total, Restricted Balance		971,470.98

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)
<b>A. REVENUES</b>								
1) LCFF Sources		8010-8099	0.00	0.00	0.00	0.00	0.00	0.0%
2) Federal Revenue		8100-8299	13,913,182.00	13,913,182.00	51,932.00	19,555,523.00	5,642,341.00	40.6%
3) Other State Revenue		8300-8599	35,863,321.00	35,863,321.00	10,095,466.00	34,846,715.00	(1,016,606.00)	-2.8%
4) Other Local Revenue		8600-8799	0.00	0.00	8,483.00	0.00	0.00	0.0%
5) TOTAL, REVENUES			49,776,503.00	49,776,503.00	10,155,881.00	54,402,238.00		
<b>B. EXPENDITURES</b>								
1) Certificated Salaries		1000-1999	0.00	0.00	0.00	0.00	0.00	0.0%
2) Classified Salaries		2000-2999	0.00	0.00	0.00	0.00	0.00	0.0%
3) Employee Benefits		3000-3999	0.00	0.00	0.00	0.00	0.00	0.0%
4) Books and Supplies		4000-4999	0.00	0.00	0.00	0.00	0.00	0.0%
5) Services and Other Operating Expenditures		5000-5999	0.00	0.00	0.00	0.00	0.00	0.0%
6) Capital Outlay		6000-6999	0.00	0.00	0.00	0.00	0.00	0.0%
7) Other Outgo (excluding Transfers of Indirect Costs)	7100-7299, 7400-7499		49,776,503.00	49,776,503.00	10,155,881.00	54,402,238.00	(4,625,735.00)	-9.3%
8) Other Outgo - Transfers of Indirect Costs		7300-7399	0.00	0.00	0.00	0.00	0.00	0.0%
9) TOTAL, EXPENDITURES			49,776,503.00	49,776,503.00	10,155,881.00	54,402,238.00		
<b>C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5 - B9)</b>			0.00	0.00	0.00	0.00		
<b>D. OTHER FINANCING SOURCES/USES</b>								
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		
<b>E. NET INCREASE (DECREASE) IN FUND BALANCE (C + D4)</b>			0.00	0.00	0.00	0.00		
<b>F. FUND BALANCE, RESERVES</b>								
1) Beginning Fund Balance								
a) As of July 1 - Unaudited		9791	0.00	0.00		0.00	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)			0.00	0.00		0.00		
d) Other Restatements		9795	0.00	0.00		0.00	0.00	0.0%
e) Adjusted Beginning Balance (F1c + F1d)			0.00	0.00		0.00		
2) Ending Balance, June 30 (E + F1e)			0.00	0.00		0.00		
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	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)
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	0.00	0.00		0.00		
<b>LCFF SOURCES</b>								
LCFF Transfers								
Property Taxes Transfers		8097	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, LCFF SOURCES			0.00	0.00	0.00	0.00	0.00	0.0%
<b>FEDERAL REVENUE</b>								
Pass-Through Revenues From Federal Sources		8287	13,913,182.00	13,913,182.00	51,932.00	19,555,523.00	5,642,341.00	40.6%
TOTAL, FEDERAL REVENUE			13,913,182.00	13,913,182.00	51,932.00	19,555,523.00	5,642,341.00	40.6%
<b>OTHER STATE REVENUE</b>								
Other State Apportionments								
Special Education Master Plan								
Current Year	6500	8311	35,863,321.00	35,863,321.00	10,095,466.00	34,795,219.00	(1,068,102.00)	-3.0%
Prior Years	6500	8319	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Apportionments - Current Year	All Other	8311	0.00	0.00	0.00	0.00	0.00	0.0%
All Other State Apportionments - Prior Years	All Other	8319	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	51,496.00	51,496.00	New
TOTAL, OTHER STATE REVENUE			35,863,321.00	35,863,321.00	10,095,466.00	34,846,715.00	(1,016,606.00)	-2.8%
<b>OTHER LOCAL REVENUE</b>								
Interest		8660	0.00	0.00	8,483.00	0.00	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%
Other Local Revenue								
Pass-Through Revenues From Local Sources		8697	0.00	0.00	0.00	0.00	0.00	0.0%
Transfers of Apportionments								
From Districts or Charter Schools		8791	0.00	0.00	0.00	0.00	0.00	0.0%
From County Offices		8792	0.00	0.00	0.00	0.00	0.00	0.0%
From JPAs		8793	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER LOCAL REVENUE			0.00	0.00	8,483.00	0.00	0.00	0.0%
TOTAL, REVENUES			49,776,503.00	49,776,503.00	10,155,881.00	54,402,238.00		
<b>OTHER OUTGO (excluding Transfers of Indirect Costs)</b>								
Other Transfers Out								
Transfers of Pass-Through Revenues								
To Districts or Charter Schools		7211	13,617,353.00	13,617,353.00	8,385.00	19,028,499.00	(5,411,146.00)	-39.7%
To County Offices		7212	295,829.00	295,829.00	52,030.00	578,520.00	(282,691.00)	-95.6%
To JPAs		7213	0.00	0.00	0.00	0.00	0.00	0.0%
Special Education SELPA Transfers of Apportionments								

Santa Barbara County SELPA JPA  
Santa Barbara County

2023-24 First Interim  
Special Education Pass-Through Fund  
Expenditures by Object

42403780000000  
Form 101  
E81A8TT2HP(2023-24)

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)
To Districts or Charter Schools	6500	7221	33,052,894.00	33,052,894.00	9,301,984.00	32,031,192.00	1,021,702.00	3.1%
To County Offices	6500	7222	2,810,427.00	2,810,427.00	793,482.00	2,764,027.00	46,400.00	1.7%
To JPAs	6500	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	0.00	0.00	0.00	0.00	0.00	0.0%
All Other Transfers Out to All Others		7299	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL, OTHER OUTGO (excluding Transfers of Indirect Costs)			49,776,503.00	49,776,503.00	10,155,881.00	54,402,238.00	(4,625,735.00)	-9.3%
TOTAL, EXPENDITURES			49,776,503.00	49,776,503.00	10,155,881.00	54,402,238.00		



Santa Barbara County SELPA JPA  
 Santa Barbara County

2023-24 First Interim  
 Special Education Pass-Through Fund  
 Restricted Detail

42403780000000  
 Form 101  
 E81A8TT2HP(2023-24)

Resource	Description	2023-24 Projected Totals
Total, Restricted Balance		0.00

**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. \_\_\_\_\_
  - 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.

**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) 1,537,805.74

**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>B. Base Costs</b>	
1. Instruction (Functions 1000-1999, objects 1000-5999 except 5100)	0.00
2. Instruction-Related Services (Functions 2000-2999, objects 1000-5999 except 5100)	5,091,922.74
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)	5,360.00
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)	25,270.00
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)	5,122,552.74
<b>C. Straight Indirect Cost Percentage Before Carry-Forward Adjustment</b>	
(For information only - not for use when claiming/recovering indirect costs)	
(Line A8 divided by Line B19)	0.00%
<b>D. Preliminary Proposed Indirect Cost Rate</b>	
(For final approved fixed-with-carry-forward rate for use in 2025-26 see <a href="http://www.cde.ca.gov/fg/ac/ic">www.cde.ca.gov/fg/ac/ic</a> )	
(Line A10 divided by Line B19)	0.00%

**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

Santa Barbara County SELPA JPA  
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First Interim  
2023-24 Projected Year Totals  
Exhibit A: Indirect Cost Rates Charged to Programs

42 40378 0000000  
Form ICR  
E81A8TT2HP(2023-24)

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

Fund	Resource	Eligible Expenditures (Objects 1000-5999 except 4700 & 5100)	Indirect Costs Charged (Objects 7310 and 7350)	Rate Used
------	----------	--	--	-----------

Description	Object Codes	Projected Year Totals (Form 01I) (A)	% Change (Cols. C-A/A) (B)	2024-25 Projection (C)	% Change (Cols. E-C/C) (D)	2025-26 Projection (E)
(Enter projections for subsequent years 1 and 2 in Columns C and E; current year - Column A - is extracted)						
<b>A. REVENUES AND OTHER FINANCING SOURCES</b>						
1. LCFF/Revenue Limit Sources	8010-8099					
2. Federal Revenues	8100-8299	29,955.00	2,503.76%	779,955.00	9.49%	853,955.00
3. Other State Revenues	8300-8599	5,376,257.00	.33%	5,393,999.00	1.34%	5,466,015.00
4. Other Local Revenues	8600-8799	520,802.00	(27.98%)	375,074.00	0.00%	375,074.00
5. Other Financing Sources						
a. Transfers In	8900-8929	0.00	0.00%		0.00%	
b. Other Sources	8930-8979	0.00	0.00%		0.00%	
c. Contributions	8980-8999	0.00	0.00%		0.00%	
6. Total (Sum lines A1 thru A5c)		5,927,014.00	10.49%	6,549,028.00	2.23%	6,695,044.00
<b>B. EXPENDITURES AND OTHER FINANCING USES</b>						
1. Certificated Salaries						
a. Base Salaries				377,328.84		377,328.84
b. Step & Column Adjustment						
c. Cost-of-Living Adjustment						
d. Other Adjustments						
e. Total Certificated Salaries (Sum lines B1a thru B1d)	1000-1999	377,328.84	0.00%	377,328.84	0.00%	377,328.84
2. Classified Salaries						
a. Base Salaries				761,430.90		766,700.90
b. Step & Column Adjustment				5,270.00		5,331.00
c. Cost-of-Living Adjustment						
d. Other Adjustments						
e. Total Classified Salaries (Sum lines B2a thru B2d)	2000-2999	761,430.90	.69%	766,700.90	.70%	772,031.90
3. Employee Benefits	3000-3999	399,046.00	1.39%	404,599.00	1.50%	410,661.00
4. Books and Supplies	4000-4999	199,908.00	.32%	200,538.00	.34%	201,228.00
5. Services and Other Operating Expenditures	5000-5999	3,422,677.00	6.84%	3,656,900.00	1.50%	3,711,654.00
6. Capital Outlay	6000-6999	0.00	0.00%		0.00%	
7. Other Outgo (excluding Transfers of Indirect Costs)	7100-7299, 7400-7499	3,084,628.00	(59.99%)	1,234,135.00	0.00%	1,234,135.00
8. Other Outgo - Transfers of Indirect Costs	7300-7399	0.00	0.00%		0.00%	
9. Other Financing Uses						
a. Transfers Out	7600-7629	0.00	0.00%		0.00%	
b. Other Uses	7630-7699	0.00	0.00%		0.00%	
10. Other Adjustments (Explain in Section G below)						
11. Total (Sum lines B1 thru B10)		8,245,018.74	(19.46%)	6,640,201.74	1.01%	6,707,038.74
<b>C. NET INCREASE (DECREASE) IN FUND BALANCE</b>						
(Line A6 minus line B11)		(2,318,004.74)		(91,173.74)		(11,994.74)
<b>D. FUND BALANCE</b>						
1. Net Beginning Fund Balance (Form 01I, line F1e)		3,733,731.93		1,415,727.19		1,324,553.45
2. Ending Fund Balance (Sum lines C and D1)		1,415,727.19		1,324,553.45		1,312,558.71
3. Components of Ending Fund Balance (Form 01I)						
(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				
b. Restricted	9740	971,470.98		1,200,000.00		1,200,000.00
c. Committed						
1. Stabilization Arrangements	9750	0.00				
2. Other Commitments	9760	0.00				
d. Assigned	9780	0.00				

Description	Object Codes	Projected Year Totals (Form 01I) (A)	% Change (Cols. C-A/A) (B)	2024-25 Projection (C)	% Change (Cols. E-C/C) (D)	2025-26 Projection (E)
e. Unassigned/Unappropriated						
1. Reserve for Economic Uncertainties	9789	0.00				
2. Unassigned/Unappropriated	9790	444,256.21		124,553.45		112,558.71
f. Total Components of Ending Fund Balance (Line D3f must agree with line D2)		1,415,727.19		1,324,553.45		1,312,558.71
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	444,256.21		124,553.45		112,558.71
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				
b. Reserve for Economic Uncertainties	9789	0.00				
c. Unassigned/Unappropriated	9790	0.00				
3. Total Available Reserves - by Amount (Sum lines E1a thru E2c)		444,256.21		124,553.45		112,558.71
4. Total Available Reserves - by Percent (Line E3 divided by Line F2)		5.39%		1.88%		1.68%
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)						
2. Total Expenditures and Other Financing Uses (Line B11)		8,245,018.74		6,640,201.74		6,707,038.74
3. Less: Special Education Pass-through (Not applicable for JPAs)		N/A		N/A		N/A
4. Sub-Total (Line F2 minus F3)		8,245,018.74		6,640,201.74		6,707,038.74
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)		412,250.94		332,010.09		335,351.94
7. Reserve Standard - By Amount (Refer to Form 01CSI, Criterion 10 for calculation details)		80,000.00		80,000.00		80,000.00
8. Reserve Standard (Greater of Line F6 or F7)		412,250.94		332,010.09		335,351.94
9. Available Reserves (Line E3) Meet the Reserve Standard (Line F8)		YES		NO		NO
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.						

## **2023-24 First Interim – Cash Flow Notes**

All estimates are very conservative.

### **Revenues:**

AB602 funding are distributed per the apportionment schedule.

Federal Funding is accrued each year and anticipated to be received by March of the following year.

Local Revenue (chargebacks to LEAs for BCBA,SB-PIC, etc.) are accrued and anticipated to be received by September of the following year.

### **Expenditures:**

All expenditures are distributed on an even basis.



Santa Barbara County SELPA JPA  
Santa Barbara County

First Interim  
2023-24 Budget  
Cashflow Worksheet - Budget Year (1)

42 40378 0000000  
Form CASH  
E81A8TT2HP(2023-24)

Description	Object	Beginning Balances (Ref. Only)	July	August	September	October	November	December	January	February
ACTUALS THROUGH THE MONTH OF (Enter Month Name):	October									
A. BEGINNING CASH			4,185,266.34	4,273,388.96	4,154,194.85	4,712,354.20	4,711,828.36	4,223,228.36	3,734,628.36	3,246,028.36
B. RECEIPTS										
LCFF/Revenue Limit Sources										
Principal Apportionment	8010-8019									
Property Taxes	8020-8079									
Miscellaneous Funds	8080-8099									
Federal Revenue	8100-8299		173,473.89		(157,695.04)					
Other State Revenue	8300-8599		268,813.00	263,267.00	484,472.00	484,472.00	484,400.00	484,400.00	484,400.00	484,400.00
Other Local Revenue	8600-8799		23,788.09	87,185.26	13,337.98	23,540.71				
Interfund Transfers In	8910-8929									
All Other Financing Sources	8930-8979									
TOTAL RECEIPTS			466,074.98	350,452.26	340,114.94	508,012.71	484,400.00	484,400.00	484,400.00	484,400.00
C. DISBURSEMENTS										
Certificated Salaries	1000-1999		31,444.07	31,444.07	31,444.07	31,444.07	32,000.00	32,000.00	32,000.00	32,000.00
Classified Salaries	2000-2999		63,452.57	63,452.58	63,452.58	63,452.57	64,000.00	64,000.00	64,000.00	64,000.00
Employee Benefits	3000-3999		69,262.88	26,521.88	27,301.54	26,677.77	32,000.00	32,000.00	32,000.00	32,000.00
Books and Supplies	4000-4999		400.00	3,249.43	1,054.09	2,354.25	25,000.00	25,000.00	25,000.00	25,000.00
Services	5000-5999		142,592.16	116,520.83	174,730.55	211,818.94	348,000.00	348,000.00	348,000.00	348,000.00
Capital Outlay	6000-6599									
Other Outgo	7000-7499		(787,291.00)	(71,365.33)	867.74	172,790.95	472,000.00	472,000.00	472,000.00	472,000.00
Interfund Transfers Out	7600-7629									

Santa Barbara County SELPA JPA  
Santa Barbara County

First Interim  
2023-24 Budget  
Cashflow Worksheet - Budget Year (1)

42 40378 0000000  
Form CASH  
E81A8TT2HP(2023-24)

Description	Object	Beginning Balances (Ref. Only)	July	August	September	October	November	December	January	February
All Other Financing Uses	7630-7699									
TOTAL DISBURSEMENTS			(480,139.32)	169,823.46	298,850.57	508,538.55	973,000.00	973,000.00	973,000.00	973,000.00
D. BALANCE SHEET ITEMS										
<u>Assets and Deferred Outflows</u>										
Cash Not In Treasury	9111-9199	139,228.00		(139,228.00)						
Accounts Receivable	9200-9299	(1,027,342.68)	248,638.64	68,323.86	520,894.98					
Due From Other Funds	9310									
Stores	9320									
Prepaid Expenditures	9330									
Other Current Assets	9340									
Lease Receivable	9380									
Deferred Outflows of Resources	9490									
SUBTOTAL		(888,114.68)	248,638.64	(70,904.14)	520,894.98	0.00	0.00	0.00	0.00	0.00
<u>Liabilities and Deferred Inflows</u>										
Accounts Payable	9500-9599	(1,339,649.09)	1,106,730.32	228,918.77	4,000.00					
Due To Other Funds	9610									
Current Loans	9640									
Unearned Revenues	9650									
Deferred Inflows of Resources	9690									
SUBTOTAL		(1,339,649.09)	1,106,730.32	228,918.77	4,000.00	0.00	0.00	0.00	0.00	0.00
<u>Nonoperating</u>										
Suspense Clearing	9910									
TOTAL BALANCE SHEET ITEMS		451,534.41	(858,091.68)	(299,822.91)	516,894.98	0.00	0.00	0.00	0.00	0.00
E. NET INCREASE/DECREASE (B - C + D)			88,122.62	(119,194.11)	558,159.35	(525.84)	(488,600.00)	(488,600.00)	(488,600.00)	(488,600.00)
F. ENDING CASH (A + E)			4,273,388.96	4,154,194.85	4,712,354.20	4,711,828.36	4,223,228.36	3,734,628.36	3,246,028.36	2,757,428.36
G. ENDING CASH, PLUS CASH ACCRUALS AND ADJUSTMENTS										

Santa Barbara County SELPA JPA  
Santa Barbara County

First Interim  
2023-24 Budget  
Cashflow Worksheet - Budget Year (1)

42 40378 0000000  
Form CASH  
E81A8TT2HP(2023-24)

Description	Object	March	April	May	June	Accruals	Adjustments	TOTAL	BUDGET
ACTUALS THROUGH THE MONTH OF (Enter Month Name):	October								
A. BEGINNING CASH		2,757,428.36	2,268,828.36	1,780,228.36	1,291,628.36				
B. RECEIPTS									
LCFF/Revenue Limit Sources									
Principal Apportionment	8010-8019					0.00		0.00	0.00
Property Taxes	8020-8079							0.00	0.00
Miscellaneous Funds	8080-8099							0.00	0.00
Federal Revenue	8100-8299					14,176.15		29,955.00	29,955.00
Other State Revenue	8300-8599	484,400.00	484,400.00	484,400.00	484,433.00			5,376,257.00	5,376,257.00
Other Local Revenue	8600-8799					372,949.96		520,802.00	520,802.00
Interfund Transfers In	8910-8929							0.00	0.00
All Other Financing Sources	8930-8979							0.00	0.00
TOTAL RECEIPTS		484,400.00	484,400.00	484,400.00	484,433.00	387,126.11	0.00	5,927,014.00	5,927,014.00
C. DISBURSEMENTS									
Certificated Salaries	1000-1999	32,000.00	32,000.00	32,000.00	27,552.56	0.00		377,328.84	377,328.84
Classified Salaries	2000-2999	64,000.00	64,000.00	64,000.00	59,620.60			761,430.90	761,430.90
Employee Benefits	3000-3999	32,000.00	32,000.00	32,000.00	25,281.93			399,046.00	399,046.00
Books and Supplies	4000-4999	25,000.00	25,000.00	25,000.00	17,850.23			199,908.00	199,908.00
Services	5000-5999	348,000.00	348,000.00	348,000.00	341,014.52			3,422,677.00	3,422,677.00
Capital Outlay	6000-6599							0.00	0.00
Other Outgo	7000-7499	472,000.00	472,000.00	472,000.00	465,625.64			3,084,628.00	3,084,628.00
Interfund Transfers Out	7600-7629							0.00	0.00
All Other Financing Uses	7630-7699							0.00	0.00

Santa Barbara County SELPA JPA  
Santa Barbara County

First Interim  
2023-24 Budget  
Cashflow Worksheet - Budget Year (1)

42 40378 0000000  
Form CASH  
E81A8TT2HP(2023-24)

Description	Object	March	April	May	June	Accruals	Adjustments	TOTAL	BUDGET
TOTAL DISBURSEMENTS		973,000.00	973,000.00	973,000.00	936,945.48	0.00	0.00	8,245,018.74	8,245,018.74
D. BALANCE SHEET ITEMS									
<u>Assets and Deferred Outflows</u>									
Cash Not In Treasury	9111-9199							(139,228.00)	
Accounts Receivable	9200-9299				189,485.00	387,126.00		1,414,468.48	
Due From Other Funds	9310							0.00	
Stores	9320							0.00	
Prepaid Expenditures	9330							0.00	
Other Current Assets	9340							0.00	
Lease Receivable	9380							0.00	
Deferred Outflows of Resources	9490							0.00	
SUBTOTAL		0.00	0.00	0.00	189,485.00	387,126.00	0.00	1,275,240.48	
<u>Liabilities and Deferred Inflows</u>									
Accounts Payable	9500-9599							1,339,649.09	
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	1,339,649.09	
<u>Nonoperating</u>									
Suspense Clearing	9910							0.00	
TOTAL BALANCE SHEET ITEMS		0.00	0.00	0.00	189,485.00	387,126.00	0.00	(64,408.61)	
E. NET INCREASE/DECREASE (B - C + D)		(488,600.00)	(488,600.00)	(488,600.00)	(263,027.48)	774,252.11	0.00	(2,382,413.35)	(2,318,004.74)
F. ENDING CASH (A + E)		2,268,828.36	1,780,228.36	1,291,628.36	1,028,600.88				
G. ENDING CASH, PLUS CASH ACCRUALS AND ADJUSTMENTS								1,802,852.99	

Santa Barbara County SELPA JPA  
Santa Barbara County

First Interim  
2023-24 Budget  
Cashflow Worksheet - Budget Year (2)

42 40378 0000000  
Form CASH  
E81A8TT2HP(2023-24)

Description	Object	Beginning Balances (Ref. Only)	July	August	September	October	November	December	January	February
ACTUALS THROUGH THE MONTH OF (Enter Month Name):	October 2023									
A. BEGINNING CASH			1,028,600.88	750,300.88	472,000.88	409,400.88	346,800.88	284,200.88	594,550.88	531,950.88
B. RECEIPTS										
LCFF/Revenue Limit Sources										
Principal Apportionment	8010- 8019									
Property Taxes	8020- 8079									
Miscellaneous Funds	8080- 8099									
Federal Revenue	8100- 8299									
Other State Revenue	8300- 8599		269,700.00	269,700.00	485,400.00	485,400.00	485,400.00	485,400.00	485,400.00	485,400.00
Other Local Revenue	8600- 8799									
Interfund Transfers In	8910- 8929									
All Other Financing Sources	8930- 8979									
TOTAL RECEIPTS			269,700.00	269,700.00	485,400.00	485,400.00	485,400.00	485,400.00	485,400.00	485,400.00
C. DISBURSEMENTS										
Certificated Salaries	1000- 1999		32,000.00	32,000.00	32,000.00	32,000.00	32,000.00	32,000.00	32,000.00	32,000.00
Classified Salaries	2000- 2999		64,000.00	64,000.00	64,000.00	64,000.00	64,000.00	64,000.00	64,000.00	64,000.00
Employee Benefits	3000- 3999		34,000.00	34,000.00	34,000.00	34,000.00	34,000.00	34,000.00	34,000.00	34,000.00
Books and Supplies	4000- 4999		18,000.00	18,000.00	18,000.00	18,000.00	18,000.00	18,000.00	18,000.00	18,000.00
Services	5000- 5999		300,000.00	300,000.00	300,000.00	300,000.00	300,000.00	300,000.00	300,000.00	300,000.00
Capital Outlay	6000- 6599									
Other Outgo	7000- 7499		100,000.00	100,000.00	100,000.00	100,000.00	100,000.00	100,000.00	100,000.00	100,000.00
Interfund Transfers Out	7600- 7629									

Description	Object	Beginning Balances (Ref. Only)	July	August	September	October	November	December	January	February
All Other Financing Uses	7630-7699									
TOTAL DISBURSEMENTS			548,000.00	548,000.00	548,000.00	548,000.00	548,000.00	548,000.00	548,000.00	548,000.00
D. BALANCE SHEET ITEMS										
<u>Assets and Deferred Outflows</u>										
Cash Not In Treasury	9111-9199									
Accounts Receivable	9200-9299	(387,126.00)						372,950.00		
Due From Other Funds	9310									
Stores	9320									
Prepaid Expenditures	9330									
Other Current Assets	9340									
Lease Receivable	9380									
Deferred Outflows of Resources	9490									
SUBTOTAL		(387,126.00)	0.00	0.00	0.00	0.00	0.00	372,950.00	0.00	0.00
<u>Liabilities and Deferred Inflows</u>										
Accounts Payable	9500-9599									
Due To Other Funds	9610									
Current Loans	9640									
Unearned Revenues	9650									
Deferred Inflows of Resources	9690									
SUBTOTAL		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<u>Nonoperating</u>										
Suspense Clearing	9910									
TOTAL BALANCE SHEET ITEMS		(387,126.00)	0.00	0.00	0.00	0.00	0.00	372,950.00	0.00	0.00
E. NET INCREASE/DECREASE (B - C + D)			(278,300.00)	(278,300.00)	(62,600.00)	(62,600.00)	(62,600.00)	310,350.00	(62,600.00)	(62,600.00)
F. ENDING CASH (A + E)			750,300.88	472,000.88	409,400.88	346,800.88	284,200.88	594,550.88	531,950.88	469,350.88
G. ENDING CASH, PLUS CASH ACCRUALS AND ADJUSTMENTS										

Santa Barbara County SELPA JPA  
Santa Barbara County

First Interim  
2023-24 Budget  
Cashflow Worksheet - Budget Year (2)

42 40378 0000000  
Form CASH  
E81A8TT2HP(2023-24)

Description	Object	March	April	May	June	Accruals	Adjustments	TOTAL	BUDGET
ACTUALS THROUGH THE MONTH OF (Enter Month Name):	October 2023								
A. BEGINNING CASH		469,350.88	420,926.88	358,326.88	295,726.88				
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					779,955.00		779,955.00	779,955.00
Other State Revenue	8300-8599	485,400.00	485,400.00	485,400.00	485,999.00			5,393,999.00	5,393,999.00
Other Local Revenue	8600-8799					375,074.00		375,074.00	375,074.00
Interfund Transfers In	8910-8929							0.00	
All Other Financing Sources	8930-8979							0.00	
TOTAL RECEIPTS		485,400.00	485,400.00	485,400.00	485,999.00	1,155,029.00	0.00	6,549,028.00	6,549,028.00
C. DISBURSEMENTS									
Certificated Salaries	1000-1999	32,000.00	32,000.00	32,000.00	25,329.00			377,329.00	377,329.00
Classified Salaries	2000-2999	64,000.00	64,000.00	64,000.00	62,701.00			766,701.00	766,701.00
Employee Benefits	3000-3999	34,000.00	34,000.00	34,000.00	30,599.00			404,599.00	404,599.00
Books and Supplies	4000-4999	18,000.00	18,000.00	18,000.00	2,538.00			200,538.00	200,538.00
Services	5000-5999	300,000.00	300,000.00	300,000.00	356,900.00			3,656,900.00	2,656,900.00
Capital Outlay	6000-6599							0.00	
Other Outgo	7000-7499	100,000.00	100,000.00	100,000.00	134,135.00			1,234,135.00	1,234,135.00
Interfund Transfers Out	7600-7629							0.00	

Santa Barbara County SELPA JPA  
Santa Barbara County

First Interim  
2023-24 Budget  
Cashflow Worksheet - Budget Year (2)

42 40378 0000000  
Form CASH  
E81A8TT2HP(2023-24)

Description	Object	March	April	May	June	Accruals	Adjustments	TOTAL	BUDGET
All Other Financing Uses	7630-7699							0.00	
TOTAL DISBURSEMENTS		548,000.00	548,000.00	548,000.00	612,202.00	0.00	0.00	6,640,202.00	5,640,202.00
D. BALANCE SHEET ITEMS									
<u>Assets and Deferred Outflows</u>									
Cash Not In Treasury	9111-9199							0.00	
Accounts Receivable	9200-9299	14,176.00						387,126.00	
Due From Other Funds	9310							0.00	
Stores	9320							0.00	
Prepaid Expenditures	9330							0.00	
Other Current Assets	9340							0.00	
Lease Receivable	9380							0.00	
Deferred Outflows of Resources	9490							0.00	
SUBTOTAL		14,176.00	0.00	0.00	0.00	0.00	0.00	387,126.00	
<u>Liabilities and Deferred Inflows</u>									
Accounts Payable	9500-9599							0.00	
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	0.00	
<u>Nonoperating</u>									
Suspense Clearing	9910							0.00	
TOTAL BALANCE SHEET ITEMS		14,176.00	0.00	0.00	0.00	0.00	0.00	387,126.00	
E. NET INCREASE/DECREASE (B - C + D)		(48,424.00)	(62,600.00)	(62,600.00)	(126,203.00)	1,155,029.00	0.00	295,952.00	908,826.00
F. ENDING CASH (A + E)		420,926.88	358,326.88	295,726.88	169,523.88				
G. ENDING CASH, PLUS CASH ACCRUALS AND ADJUSTMENTS								1,324,552.88	



## 2023-24 First Interim – SACS Criteria and Standards

The SACS Criteria and Standards form is required for all SACS reporting, Budget Adoption, First Interim and Second Interim. It looks at the information that has been uploaded into the General Fund Report and compares it to previously reported data. In areas where the Criteria and Standards have not been met an explanation is required.

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### Criteria and Standards Summary “Not Met” and/or Additional Comments

#### 6a) Revenue and Expenditures:

For Multi-year projection 24-25 and 25-26 Revenue changed more than 5% from 23-24 Adopted due to:

- Federal Revenue: \$750,000 increase being allocated to SELPA Fund 01 to fund Mental Health Services and NPS Pool
- State Revenue: AB602 revenue decreased \$1.7 million; utilized federal funding and reduced transfer expenditures to retain out of home care funding in MYP to replace AB602 funds.

Local/Other Revenue: 23-24 increase is due to the reversal of the 22-23 Year End Close Fair Market Value Adjustment.

#### 8) Deficit Spending:

It appears that SELPA is deficit spending, when in fact, SELPA has used prior year Ending Fund Balance monies per our JPA Board’s direction to establish one-time only allocations and payments in FY 23-24. This includes \$600,770 in Low Incidence, \$299,673 in Legal and \$43,000 in other ending fund balance expenses. In addition, due to the shift of Mental Health Funding in the 2023-24 school year, and the calculated minimum allocation required to be distributed to LEAs from AB602 Base Grant, in order to continue all Mental Health Services and NPS Cost Pool, ~\$1.7 million in 22-23 Ending Fund Balance was designated to cover the shortfall in revenue over ongoing expenses for 23-24. This will be made up in future years by designating alternative ongoing funding sources for the mental health expenditures, including Non Public School Cost Pool.

#### 10) Reserves:

SELPA meets all required reserve calculations. The SACS software does not recognize revenue in Resource 6500 as being available for reserves even though most of SELPA funding is in the 6500 Resource.

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.

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**CRITERIA AND STANDARDS**

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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		Ratio of Salaries and Benefits to Total Expenditures
	Salaries and Benefits (Form 01, Objects 1000-3999)	Total Expenditures (Form 01, Objects 1000-7499)	
Third Prior Year (2020-21)	1,472,357.46	6,416,922.28	22.9%
Second Prior Year (2021-22)	1,533,716.72	7,067,091.19	21.7%
First Prior Year (2022-23)	1,638,219.00	9,032,580.00	18.1%
	Historical Average Ratio:		20.9%

	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
JPA's Reserve Standard Percentage (Criterion 10B, Line 4):	5%	5%	5%
<b>JPA's Salaries and Benefits Standard</b> (historical average ratio, plus/minus the greater of 3% or the JPA's reserve standard percentage):	15.9% to 25.9%	15.9% to 25.9%	15.9% to 25.9%

**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		Ratio of Salaries and Benefits to Total Expenditures	Status
	Salaries and Benefits (Form 01I, Objects 1000-3999) (Form MYPI, Lines B1-B3)	Total Expenditures (Form 01I, Objects 1000-7499) (Form MYPI, Lines B1-B8, B10)		
Current Year (2023-24)	1,537,805.74	8,245,018.74	18.7%	Met
1st Subsequent Year (2024-25)	1,548,628.74	6,640,201.74	23.3%	Met
2nd Subsequent Year (2025-26)	1,560,021.74	6,707,038.74	23.3%	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 MET - Ratio of total salaries and benefits to total expenditures has met the standard for the current year and two subsequent fiscal years.

**Explanation:**  
(required if NOT met)

## 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 budget adoption. 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: Budget Adoption data that exist will be extracted; otherwise, enter data into the first column. First Interim data for Current Year are extracted. If First 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	Budget Adoption	First Interim		Change Is Outside Explanation Range
	Budget	Projected Year Totals		
	(Form 01CS, Item 6B)	(Fund 01) (Form MYPI)	Percent Change	
Federal Revenue (Fund 01, Objects 8100-8299) (Form MYPI, Line A2)				
Current Year (2023-24)	29,955.00	29,955.00	0.0%	No
1st Subsequent Year (2024-25)	29,955.00	779,955.00	2,503.8%	Yes
2nd Subsequent Year (2025-26)	29,955.00	853,955.00	2,750.8%	Yes

**Explanation**  
(required if Yes)

Increase to federal funding currently considered for future funding mechanism for NPS Cost pool and Mental Health Services.

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

Current Year (2023-24)	5,383,074.00	5,376,257.00	-.1%	No
1st Subsequent Year (2024-25)	7,147,370.00	5,393,999.00	-24.5%	Yes
2nd Subsequent Year (2025-26)	7,257,241.00	5,466,015.00	-24.7%	Yes

**Explanation**  
(required if Yes)

Formerly planned to increase AB602 in 24-25 and 25-26 to meet NPS Pool and Mental Health Services funding needs, now shifting to utilizing Federal funds, and repurposing \$950,000 of Out-of-Home Care. This results in a -\$1.7 million shift in funding sources for 24-25. Additional funds added in 25-26 to offset rising costs.

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

Current Year (2023-24)	351,740.00	520,802.00	48.1%	Yes
1st Subsequent Year (2024-25)	351,740.00	375,074.00	6.6%	Yes
2nd Subsequent Year (2025-26)	351,740.00	375,074.00	6.6%	Yes

**Explanation**  
(required if Yes)

Reversal of prior year end Fair Market Value adjustment in 2023-24 gives appearance of increased revenue. It is restoring the reduced EFB in 22-23 due to the Fair Market Value Adjustment.

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

Current Year (2023-24)	198,908.00	199,908.00	.5%	No
1st Subsequent Year (2024-25)	199,816.00	200,538.00	.4%	No
2nd Subsequent Year (2025-26)	200,608.00	201,228.00	.3%	No

**Explanation**  
(required if Yes)

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

Current Year (2023-24)	3,357,491.00	3,422,677.00	1.9%	No
1st Subsequent Year (2024-25)	3,649,475.00	3,656,900.00	.2%	No
2nd Subsequent Year (2025-26)	3,714,273.00	3,711,654.00	-.1%	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	Budget Adoption Budget	First Interim Projected Year Totals	Percent Change	Explanation Range
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**Total Federal, Other State, and Other Local Revenues (Section 6A)**

Current Year (2023-24)	5,764,769.00	5,927,014.00	2.8%	Met
1st Subsequent Year (2024-25)	7,529,065.00	6,549,028.00	-13.0%	Not Met
2nd Subsequent Year (2025-26)	7,638,936.00	6,695,044.00	-12.4%	Not Met

**Total Books and Supplies, and Services and Other Operating Expenditures (Section 6A)**

Current Year (2023-24)	3,556,399.00	3,622,585.00	1.9%	Met
1st Subsequent Year (2024-25)	3,849,291.00	3,857,438.00	.2%	Met
2nd Subsequent Year (2025-26)	3,914,881.00	3,912,882.00	-.1%	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 budget adoption 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)

Increase to federal funding currently considered for future funding mechanism for NPS Cost pool and Mental Health Services.

**Explanation:**

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

Formerly planned to increase AB602 in 24-25 and 25-26 to meet NPS Pool and Mental Health Services funding needs, now shifting to utilizing Federal funds, and repurposing \$950,000 of Out-of-Home Care. This results in a -\$1.7 million shift in funding sources for 24-25. Additional funds added in 25-26 to offset rising costs.

**Explanation:**

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

Reversal of prior year end Fair Market Value adjustment in 2023-24 gives appearance of increased revenue. It is restoring the reduced EFB in 22-23 due to the Fair Market Value Adjustment.

- 1b. STANDARD MET - Projected total operating expenditures have not changed since budget adoption 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 budget adoption 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 reserves<sup>1</sup> as a percentage of total expenditures and other financing uses<sup>2</sup> in any of the current fiscal year or two subsequent fiscal years.

<sup>1</sup>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. <sup>2</sup>A 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 (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
JPA's Available Reserve Percentage (Criterion 10C, Line 9)	5.4%	1.9%	1.7%
JPA's Deficit Spending Standard Percentage Levels (one-third of available reserve percentage):	1.8%	.6%	.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)	Total Expenditures and Other Financing Uses (Form 011, Objects 1000-7999)	Deficit Spending Level (If Net Change in Fund Balance is negative, else N/A)	
	(Form MYPI, Line C)	(Form MYPI, Line B11)		
Current Year (2023-24)	(2,318,004.74)	8,245,018.74	28.1%	Not Met
1st Subsequent Year (2024-25)	(91,173.74)	6,640,201.74	1.4%	Not Met
2nd Subsequent Year (2025-26)	(11,994.74)	6,707,038.74	.2%	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)

In 23-24 there are additional expenditures as the result of 1x carry over of 22-23 Ending Fund Balances, mostly in the 7000s Transfers to LEAs. This includes \$600,770 in Low Incidence, \$299,673 in Legal and \$43,000 in other ending fund balance expenses. In addition, due to the shift of Mental Health Funding in the 2023-24 school year, and the calculated minimum allocation required to be distributed to LEAs from AB602 Base Grant, in order to continue all Mental Health Services and NPS Cost Pool, ~\$1.7 million in 22-23 Ending Fund Balance was designated to cover the shortfall in revenue over ongoing expenses for 23-24.



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 (2023-24)	1,415,727.19	Met
1st Subsequent Year (2024-25)	1,324,553.45	Met
2nd Subsequent Year (2025-26)	1,312,558.71	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		
Fiscal Year	(Form CASH, Line F, June Column)	Status
Current Year (2023-24)	1,028,600.88	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 reserves<sup>1</sup> for any of the current fiscal year or two subsequent fiscal years are not less than the following percentages or amounts<sup>2</sup> as applied to total expenditures and other financing uses<sup>3</sup>:

Percentage Level	JPA ADA	
5% or \$80,000 (greater of)	0	to 300
4% or \$80,000 (greater of)	301	to 1,000
3%	1,001	to 30,000
2%	30,001	to 400,000
1%	400,001	and over

<sup>1</sup> 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. <sup>2</sup> Dollar amounts to be adjusted annually by the prior year statutory cost-of-living adjustment, as referenced in Education Code Section 42238.02, rounded to the nearest thousand.

<sup>3</sup> 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 (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
JPA ADA (Form MYPI, Line F1, if available; else defaults to zero and may be overwritten)	0.00	0.00	0.00
<b>JPA's Reserve Standard Percentage Level:</b>	<b>5%</b>	<b>5%</b>	<b>5%</b>

**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 (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
1. Total Expenditures and Other Financing Uses (Criterion 8, Item 8B)	8,245,018.74	6,640,201.74	6,707,038.74
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)	8,245,018.74	6,640,201.74	6,707,038.74
4. Reserve Standard Percentage Level	5%	5%	5%
5. Reserve Standard - by Percent (Line B3 times Line B4)	412,250.94	332,010.09	335,351.94
6. Reserve Standard - by Amount (\$80,000 for JPAs with less than 1,001 ADA, else 0)	80,000.00	80,000.00	80,000.00
7. <b>JPA's Reserve Standard</b> <b>(Greater of Line B5 or Line B6)</b>	<b>412,250.94</b>	<b>332,010.09</b>	<b>335,351.94</b>

**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	1st Subsequent Year	2nd Subsequent Year
	(2023-24)	(2024-25)	(2025-26)
1. General Fund - Stabilization Arrangements (Fund 01, Object 9750) (Form MYPI, Line E1a)	0.00		
2. General Fund - Reserve for Economic Uncertainties (Fund 01, Object 9789) (Form MYPI, Line E1b)	0.00		
3. General Fund - Unassigned/Unappropriated Amount (Fund 01, Object 9790) (Form MYPI, Line E1c)	444,256.21	124,553.45	112,558.71
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		
6. Special Reserve Fund - Reserve for Economic Uncertainties (Fund 17, Object 9789) (Form MYPI, Line E2b)	0.00		
7. Special Reserve Fund - Unassigned/Unappropriated Amount (Fund 17, Object 9790) (Form MYPI, Line E2c)	0.00		
8. JPA's Available Reserve Amount (Lines C1 thru C7)	444,256.21	124,553.45	112,558.71
9. JPA's Available Reserve Percentage (Information only) (Line 8 divided by Section 10B, Line 3)	5.39%	1.88%	1.68%
<b>JPA's Reserve Standard (Section 10B, Line 7):</b>	<b>412,250.94</b>	<b>332,010.09</b>	<b>335,351.94</b>
Status:	Met	Not Met	Not 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)

SELPA meets all required reserve calculations. The SACS software does not recognize revenue in Resource 6500 as being available for reserves even though most of SELPA funding is in the 6500 Resource.

**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 budget adoption 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 budget adoption 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 budget adoption.

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 budget adoption.

Identify capital project cost overruns that have occurred since budget adoption 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: Budget Adoption data that exist will be extracted; otherwise, enter data into the first column. For Transfers In and Transfers Out, if Form MYPI exists, the data will be extracted into the First Interim column for the Current Year, and 1st and 2nd Subsequent Years. If Form MYPI 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	Budget Adoption (Form 01CS, Item S5A)	First Interim Projected Year Totals	Percent Change	Amount of Change	Status
<b>1a. Contributions, Unrestricted General Fund</b>					
This item is not applicable for JPAs.					
<b>1b. Transfers In, General Fund *</b>					
Current Year (2023-24)	0.00	0.00	0.0%	0.00	Met
1st Subsequent Year (2024-25)	0.00		0.0%	0.00	Not Met
2nd Subsequent Year (2025-26)	0.00		0.0%	0.00	Not Met
<b>1c. Transfers Out, General Fund *</b>					
Current Year (2023-24)	0.00	0.00	0.0%	0.00	Met
1st Subsequent Year (2024-25)	0.00		0.0%	0.00	Not Met
2nd Subsequent Year (2025-26)	0.00		0.0%	0.00	Not Met
<b>1d. Capital Project Cost Overruns</b>					
Have capital project cost overruns occurred since budget adoption that may impact the general fund operational budget?	<span style="border: 1px solid black; padding: 2px;">No</span>				

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

SSB. 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. NOT MET - The projected transfers in to the general fund have changed since budget adoption by more than the standard for any of the current year or subsequent two fiscal years. Identify the amounts transferred, by fund, and whether transfers are ongoing or one-time in nature. If ongoing, explain the JPA's plan, with timeframes, for reducing or eliminating the transfers.

**Explanation:**  
(required if NOT met)

There are additional expenditures Transfer expenses in the 23-24 First Interim Budget as the result of designated use of 22-23 Unaudited Actuals Ending Fund Balances. This includes \$600,770 in Low Incidence, \$299,673 in Legal and \$43,000 in other ending fund balance expenses. These transfers were removed for the 24-25 budget. In addition the transfers for the two subsequent years of \$950,000 of Out of Home Care funding has been removed, proposing to use as an ongoing funding source to fund the nonpublic school cost pool.

1c. NOT MET - The projected transfers out of the general fund have changed since budget adoption by more than the standard for any of the current year or subsequent two fiscal years. Identify the amounts transferred, by fund, and whether transfers are ongoing or one-time in nature. If ongoing, explain the JPA's plan, with timeframes, for reducing or eliminating the transfers.

**Explanation:**  
(required if NOT met)

There are additional expenditures Transfer expenses in the 23-24 First Interim Budget as the result of designated use of 22-23 Unaudited Actuals Ending Fund Balances. This includes \$600,770 in Low Incidence, \$299,673 in Legal and \$43,000 in other ending fund balance expenses. These transfers were removed for the 24-25 budget. In addition the transfers for the two subsequent years of \$950,000 of Out of Home Care funding has been removed, proposing to use as an ongoing funding source to fund the nonpublic school cost pool.

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

**Project Information:**  
(required if YES)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



Total Annual Payments:	0	0	0	0
Has total annual payment increased over prior year (2022-23)	No	No	No	No

#### 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 budget adoption, 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. Budget Adoption data that exist (Form 01CS, Item S7A) will be extracted; otherwise, enter Budget Adoption and First 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 budget adoption in OPEB liabilities?

n/a

c. If Yes to Item 1a, have there been changes since budget adoption 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)

Budget Adoption  
(Form 01CS, Item S7A)

First 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 (2023-24)  
1st Subsequent Year (2024-25)  
2nd Subsequent Year (2025-26)

Budget Adoption  
(Form 01CS, Item S7A)

First Interim


b. OPEB amount contributed (for this purpose, include premiums paid to a self-insurance fund) (Funds 01-70, objects 3701-3752)  
Current Year (2023-24)  
1st Subsequent Year (2024-25)  
2nd Subsequent Year (2025-26)

0.00	0.00

c. Cost of OPEB benefits (equivalent of "pay-as-you-go" amount)  
Current Year (2023-24)  
1st Subsequent Year (2024-25)  
2nd Subsequent Year (2025-26)


d. Number of retirees receiving OPEB benefits  
Current Year (2023-24)  
1st Subsequent Year (2024-25)  
2nd Subsequent Year (2025-26)


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. Budget Adoption data that exist (Form 01CS, Item S7B) will be extracted; otherwise, enter Budget Adoption and First Interim data in items 2-4.

1	<p>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)</p>	No
	<p>b. If Yes to Item 1a, have there been changes since budget adoption in self-insurance liabilities?</p>	n/a
	<p>c. If Yes to Item 1a, have there been changes since budget adoption in self-insurance contributions?</p>	n/a

2	<p>Self-Insurance Liabilities</p> <p>a. Accrued liability for self-insurance programs</p> <p>b. Unfunded liability for self-insurance programs</p>	<p>Budget Adoption (Form 01CS, Item S7B)</p>	<p>First Interim</p>

3	<p>Self-Insurance Contributions</p> <p>a. Required contribution (funding) for self-insurance programs</p> <p>Current Year (2023-24)</p> <p>1st Subsequent Year (2024-25)</p> <p>2nd Subsequent Year (2025-26)</p> <p>b. Amount contributed (funded) for self-insurance programs</p> <p>Current Year (2023-24)</p> <p>1st Subsequent Year (2024-25)</p> <p>2nd Subsequent Year (2025-26)</p>	<p>Budget Adoption (Form 01CS, Item S7B)</p>	<p>First Interim</p>

4	<p>Comments:</p>	
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**S8. Status of Labor Agreements**

Analyze the status of all employee labor agreements. Identify new labor agreements that have been ratified since budget adoption, 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**

n/a

Were all certificated labor negotiations settled as of budget adoption?

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) (2022-23)	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
Number of certificated (non-management) full-time-equivalent (FTE) positions				

Data must be entered for all years.

1a. Have any salary and benefit negotiations been settled since budget adoption?

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 Budget Adoption**

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

1st Subsequent Year

2nd Subsequent Year

(2023-24)

(2024-25)

(2025-26)

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

1st Subsequent Year

2nd Subsequent Year

(2023-24) (2024-25) (2025-26)

6. Amount included for any tentative salary schedule increases

--	--	--

Current Year 1st Subsequent Year 2nd Subsequent Year  
(2023-24) (2024-25) (2025-26)

**Certificated (Non-management) 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


**Certificated (Non-management) Prior Year Settlements Negotiated Since Budget Adoption**

Are any new costs negotiated since budget adoption 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:


--

Current Year 1st Subsequent Year 2nd Subsequent Year  
(2023-24) (2024-25) (2025-26)

**Certificated (Non-management) 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 1st Subsequent Year 2nd Subsequent Year  
(2023-24) (2024-25) (2025-26)

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

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


**Certificated (Non-management) - Other**

List other significant contract changes that have occurred since budget adoption 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 budget adoption?

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) (2022-23)	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
Number of classified (non-management) FTE positions				

Data must be entered for all years.

1a. Have any salary and benefit negotiations been settled since budget adoption?

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?

If Yes, complete questions 5 and 6.

n/a

Negotiations Settled Since Budget Adoption

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

1st Subsequent Year

2nd Subsequent Year

(2023-24)

(2024-25)

(2025-26)

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

1st Subsequent Year

2nd Subsequent Year

(2023-24)

(2024-25)

(2025-26)

**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

1st Subsequent Year

2nd Subsequent Year

(2023-24)

(2024-25)

(2025-26)

**Classified (Non-management) Prior Year Settlements Negotiated Since Budget Adoption**

Are any new costs negotiated since budget adoption 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**

Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)

- 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

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

Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)

- 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?

**Classified (Non-management) - Other**

List other significant contract changes that have occurred since budget adoption 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 budget adoption?

Yes

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) (2022-23)	Current Year (2023-24)	1st Subsequent Year (2024-25)	2nd Subsequent Year (2025-26)
Number of management, supervisor, and confidential FTE positions				

Data must be entered for all years.

1a. Have any salary and benefit negotiations been settled since budget adoption?

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.

No

Negotiations Settled Since Budget Adoption

2. Salary settlement:

Current Year  
(2023-24)

1st Subsequent Year  
(2024-25)

2nd Subsequent Year  
(2025-26)

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")


Negotiations Not Settled

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

Current Year  
(2023-24)

1st Subsequent Year  
(2024-25)

2nd Subsequent Year  
(2025-26)

4. Amount included for any tentative salary schedule increases

--	--	--

**Management/Supervisor/Confidential**

**Health and Welfare (H&W) Benefits**

Current Year  
(2023-24)

1st Subsequent Year  
(2024-25)

2nd Subsequent Year  
(2025-26)

- 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


**Management/Supervisor/Confidential**

**Step and Column Adjustments**

Current Year  
(2023-24)

1st Subsequent Year  
(2024-25)

2nd Subsequent Year  
(2025-26)

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


**Management/Supervisor/Confidential**

**Other Benefits (mileage, bonuses, etc.)**

Current Year  
(2023-24)

1st Subsequent Year  
(2024-25)

2nd Subsequent Year  
(2025-26)

- 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






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)

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End of Joint Powers Agency First Interim Criteria and Standards Review

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## **2022-23 First Interim – Technical Review Checks**

The SACS Technical Review Checks look at all the data that has been entered in the various SACS forms to make sure that it meets all requirements. The Technical Review Checks under Export Checks must show that all checks are completed before SACS reporting can be finalized.

The attached SACS Technical Review Checks indicate zero exceptions, which means all checks have been passed.

SACS Web System - SACS V7  
11/21/2023 2:37:11 PM

42-40378-0000000

First Interim  
Actuals to Date 2023-24  
**Technical Review Checks**  
Phase - All  
Display - Exceptions Only

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)

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First Interim  
Board Approved Operating Budget 2023-24  
**Technical Review Checks**  
Phase - All  
Display - Exceptions Only

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)
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42-40378-0000000

First Interim  
Original Budget 2023-24  
**Technical Review Checks**  
Phase - All  
Display - Exceptions Only

Santa Barbara County SELPA JPA

Santa Barbara County

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

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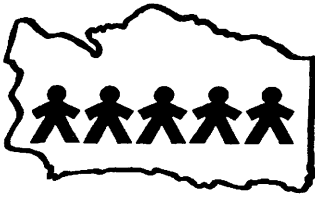
First Interim  
Projected Totals 2023-24  
**Technical Review Checks**  
Phase - All  
Display - Exceptions Only

Santa Barbara County SELPA JPA

Santa Barbara County

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

Date: December 4, 2023  
To: SBCSELPA JPA Board  
From: Ray Avila, SBCSELPA Executive Director  
Re: Santa Barbara County SELPA Local Plan Revision, Section 9, Part XVII Out-of-Home Care (*Second Reading/Approval*)

**BACKGROUND:**

- The item was previously presented to the JPA Board on November 6, 2023, as and Information & Discussion item for *first reading* on November 6, 2023
- August 29, 2022, The JPA Board approved a revision to the Section 9, Part XVII, Out-of-Home care to align with the state's new calculation for distribution of funds effective for the 2021-2022 school year.
- The new calculation formula from the state did not reference Group Homes, and Group Homes were not included in the revised local plan language.
- The calculation exhibits for 2021-2022 were finalized June 2023. When LEA Out-of-Home Care data was applied in accordance with the new language, it was evident that absence of Group Home pupil enrollment from the local plan language resulted in an inequitable distribution of Out-of-Home funds.
- The allocation and distribution of the funding generated by Short Term Residential Therapeutic Programs (STRTPs) average daily population was postponed and an Ad Hoc Committee was convened to review the Local Plan and Out-of-Home care calculation. All affected LEAs were represented in the committee. The Committee reached consensus to include Group Home pupils with IEPs in the calculation for distribution of STRTP funds.
- The change will apply retroactively to 2021-2022 funding. LEAs have not previously been allocated, budgeted, or received this funding, so the retroactive change does not negatively impact any LEA.
- This change has been vetted through SEAM and SEAMBO.

**FISCAL IMPACT:** None.

**RECOMMENDATION:** The JPA Board approves the revisions to the Local Plan, Section 9, Part XVII, Out-of-Home Care as presented.

RA:rw

## XVII. OUT-OF-HOME CARE FUNDING

The SBCSELPA receives Out-of-Home Care Funding as part of the AB602 allocation. This funding is based on

- 1) the sum of cumulative enrollment for foster youth reported through California Longitudinal Student Achievement Data System
- 2) Average Daily Population at Short Term Residential Therapeutic Programs (STRTP) collected and managed by the Department of Social Services
- 3) Student Count as of April 1<sup>st</sup> of current year for Community Care (CC), Intermediate Care (IC), and Skilled Nursing Facilities (SNF) collected by the Department of Developmental Services

The funding will be distributed as follows. For funds generated by:

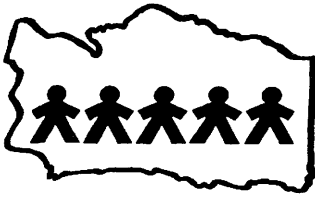
- a) Foster Youth - districts will receive a proportion based on the greater of current or two prior years' ADA
- b) STRTP - distributed to districts based on proportion of days students with IEPs were enrolled in a STRTP and/or Group Homes in their district divided by total SELPA enrollment days of students with IEPs in STRTPs and/or Group Homes.

Districts will report days of attendance in STRTPs and/or Group Homes in their district from June 1<sup>st</sup> – May 31<sup>st</sup>. The overlap in school years will allow LEAs to submit their final billing each year by June 30<sup>th</sup> of the current year.

- c) CC,IC,SNF – distributed to the geographic district of the facility

Funding will be adjusted during the Annual Certification (February of the following year). Recertifying adjustments will be distributed in accordance with above.

This change to include group homes will be effective for distribution of STRTP beginning with Fiscal Year 2021-2022.



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

Date: December 4, 2023  
To: SBCSELPA JPA Board  
From: Ray Avila, SBCSELPA Executive Director  
Re: 2023-24 Regional Programs Update

**BACKGROUND:**

- Staff presented a regional program update to the JPA Board at the November 7, 2022, meeting. There was discussion regarding concern for SB County to be able to offer a full Continuum of Services, specifically in support of our students who benefit from Therapeutic Learning Programs (G.R.O.W. classrooms).
- G.R.O.W. classrooms have remained at 16 from the 2022-2023 to the 2023-2024 school year. There are specific grade level needs in both the North and South part of our county to serve this population.
- The SBCSELPA Executive Director shared this Regional Program Update with SB County Special Education Administrators at the October 20, 2023, SEAM meeting. (**SEE REF: VIII-A.1**).
- The SBCSELPA Executive Director and Mental Health Manager will be contacting targeted LEAs to discuss with the Superintendent and Special Education Director the potential opportunities for developing a Regional and/or Non-Regional G.R.O.W. classroom within their school district.
- Staff will follow up with feedback to the JPA Board at a future meeting.

**FISCAL IMPACT:** None.

RA/lm

## AS IDENTIFIED BY SEAM

OPERATOR	SERVICE	STAFF	LOCATION	FTE
SBCEO	PRE	TODARO, DONNA	RUTH/LEAP	1.00
		MOORE, LAURIE	FILLMORE	1.00
		SOLOY, LINDA	BRUCE	1.00
		SOUZA, SANDRA	CENTRAL AVE.	1.00
		SOLORZANO-MORENO, THERESA	ALICE SHAW PRESCHOOL	1.00
		WILLIAMS, MARY	ZACA/SANTA YNEZ STATE PRE	1.00
		BAEZA, SYLVIA	ONTIVEROS LEAP	1.00
		FINNOCHIO, JESSICA	TAYLOR PRESCHOOL	1.00
		WALSH, BRITTNEE	OAK VALLEY PRE	1.00
		KNOX, BETTINA	NEW HORIZONS B	1.00
		GILBERT, DIANA	REGENCY	1.00
		VASQUEZ, FRANCES	HANCOCK, SANTA MARIA	1.00
		JERRIER, LORI	NEW HORIZONS A	1.00
		SANTOS, MARTHA	YOUNG LEARNERS	1.00
		ESCALANTE, ELVIA	PRESCHOOL PLUS	1.00
		ROMERO, MARISELA	OAKLEY PRE	1.00
		COURTNEY, NATALIE	CHAPEL HEAD START	0.50
		COURTNEY, NATALIE	LOS PADRES HEAD START	0.50
		RAMIREZ, NORMA	DE COLORES PRE	1.00
		JIMENEZ-SANTOS, HUMBERTO	CASMALIA PRE 1	1.00
		RAMOS, FRANCIA	CASMALIA PRE 2	1.00
		VACANT	MERIDIAN HEAD START	0.50
		VACANT	CRESTVIEW PRE	1.00
	Pre. Spec	NORTH/SOUTH	ITINERANT	13.45
	PRE-ASSESSMENT	ATKINSON, REBECCA	PRESCHOOL SPECIALIST	1.00
		VACANT - NPA	SPEECH SPECIALIST	1.00
		COULTER, ISABELLE	PRESCHOOL SPECIALIST	1.00
		VARIOUS	PSYCHOLOGIST	1.00
		VARIOUS	NURSE	1.00
	VH	BIRKHOLZ, BELINDA	ITINERANT	0.80
		ESCOBEDO, JULIA		1.00
		WINGELL, ROBIN		1.00
		READ, IZETTA		1.00
	O&M	WINGELL, JEFF	ITINERANT	1.00
		CLEARY, STEPHANIE	ITINERANT	1.00
	DHH SDC	RIVERA, MARIA	RIGHETTI	1.00
		HENDRIX, JOANNA	DUNLAP	1.00
		SANDERS, KELLY	DUNLAP	1.00
		MUSICIO, TORRY	KUNST JR. HIGH - SANTA MARIA	1.00
		HOUGHTON, ELLYN	AUDIOLOGIST	0.80
	DHH ITINERANT	TORRES, LAURA	ITINERANT	0.60
		MCMULLEN, ALISA	ITINERANT	1.00
		MILLER, SCOTT	ITINERANT	0.50
	INTERPRETER*	SNOW, CRYSTAL	KUNST	0.8125
		BLUEM, DENICE	DUNLAP	0.75
		CASTILO, ERIKA	DUNLAP	0.75
		HOLCOMBE, KAITLYN	KUNST	0.75
		LYONS, ROXANNE	DUNLAP	0.75
		EDWARDS, AJANI	DUNLAP	0.75
		MORALES, JENNIE	RIGHETTI	0.8125
		HART, JORDAN	RIGHETTI	0.5418
	Juv. Cr.	DANIELS, AMANDA	DOS PUERTAS (JUVENILE HALL)	1.00

	<b>ESN – North</b>	AKINS, TRACY WOOD, KRISTIN <b>CHENEY, CANDACE</b> McGREGOR, SIRIUS HAMEL, HAMILA	CABRILLO HIGH SCHOOL MANZANITA CHARTER <b>MANZANITA CHARTER</b> OLGA REED ARRELLANES JR. HIGH	1.00 1.00 1.00 1.00 1.00
	<b>OT</b>	<b>GADLER-BELL, MARILEE</b> <b>MEERS, JULIE</b>	ITINERANT – <b>South</b> ITINERANT – SYVC	1.00 1.00
<b>LOMPOC</b>	<b>DHH</b>	<b>BELL, GRAHM</b>	ITINERANT	0.50
	<b>TLP / GROW</b>	VACANT NUNEZ, SHAWN	CLARENCE RUTH CABRILLO HS	1.0 1.0
<b>ORCUTT</b>	<b>OT</b>	CATRON, SUSAN <b>LOONEY, ERIN (NPA)</b>	ITINERANT ITINERANT	1.00 1.00
<b>SMJUHSD</b>	<b>TLP / GROW</b>	OSTINI, DEBORAH <b>REIGSTAD, ASHLEY</b>	RIGHETTI HIGH SANTA MARIA HIGH	1.00 1.00
	<b>TLP / GROW 2</b>	KIRKENDOLL, RYAN	LINCOLN CENTER	1.00
<b>GOLETA</b>	<b>DHH</b>	<b>TRACY, ELIZABETH</b>	ITINERANT	<b>0.25</b> <b>0.75 - GUSD</b>
<b>SANTA BARBARA DISTRICTS</b>	<b>VH</b>	SARAGOSA, RACHEL COLUNGA, TERESA BUELL, CARRIE	ITINERANT	1.00 1.00 1.00
	<b>O&amp;M</b>	LOGAN, CARLO		.50
	<b>DHH</b>	BLACKWELL, ALISON O'DONNELL, KELLY SALAS, APRIL	ITINERANT ITINERANT ITINERANT	1.00 0.50 1.00
	<b>INTERPRETER</b>	BUCKELY WAYNE CUICO SIMMONDS	SAN MARCOS SANTA BARBARA JR. HIGH SANTA BARBARA JR. HIGH SANTA BARBARA JR. HIGH	1.00 1.00 1.00 1.00
	<b>TLP / GROW</b>	MIRANDA, PABLO <b>HULSIZER, JOE</b> REID, DEBORAH	GOLETA VALLEY JR. HIGH DOS PUEBLOS HIGH SANTA BARBARA HIGH	1.00 1.00 1.00
	<b>ESN</b>	TAFOYA, ROSEMARY SANDERS, DENNIS	GVJH DOS PUEBLOS	1.00 1.00
<b>SANTA MARIA BONITA</b>	<b>ESN</b>	<b>WATERS, KATIE</b> JOHNS, LISA	BRUCE BRUCE	1.00 1.00



# Santa Barbara County SELPA-bration



**Honoring Exceptional  
Educational Staff and Agencies**

**Supporting Special Education Students and Families**

**in Santa Barbara County**

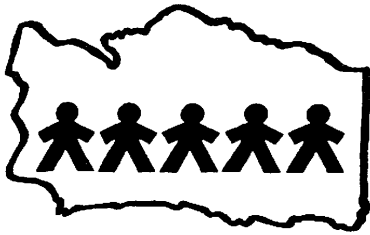
**May 16 2024, 5:00-8:00 p.m.**

**In Person**

**At the Glen Annie Golf Course**

**Frog Bar and Grill**





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

Date: December 4, 2023

To: SBCSELPA JPA Board

From: Ray Avila, SBCSELPA Executive Director

Re: SBCSELPA Funding Model Committee Update & Recommendations

## BACKGROUND:

- The Governor's 2023-2024 State Budget approved an Educationally Related Mental Health Services (ERMHS) funding *shift* from the SBCSELPA and, instead, be distributed directly to each Member LEA. With this shift, the SBCSELPA 2023-24 budget was developed based upon *not* utilizing State and Federal Mental Health Funds.
- Member LEAs of SBCSELPA have a history of collaborative local decision-making that, under the existing funding and allocation structure, has ensured that the full continuum of services, including ERMHS, is available to *all* students served within the SBCSELPA.
- In response to the shift of mental health funds, and the potential shift of funds and/or funding restrictions in the January 2024 Trailer Bill language, SBCSELPA assembled a Funding Model Committee with the priority being a focus on developing a sustainable SBCSELPA budget for years to come. This committee will also address other aspects of special education funding in SB County.
- The Funding Model Committee is composed of Special Education Administrators and LEA Business Officials from different LEA's in SB County (**SEE REF: VIII-C.1**). These individuals have committed to volunteer their time to participate on the committee for the 2023-24 year in response to SBCSELPA messaging the need and seeking interest from participants in our county. The committee will meet approximately five times during the course of this school year.
- To ensure there is full transparency of meeting discussion, meeting notes are transcribed and shared out with committee members before a final draft is documented (**SEE REF: VIII-C.2**).
- The SBCSELPA Executive Director and Chief Business Official will continue to keep the JPA Board updated as Funding Model Committee meetings transpire for the remainder of the 2023-24 year.

**FISCAL IMPACT:** The fiscal impact is \$0 based on current practice.



## COMMITTEE MEMBERS AND GOALS

Representation	District	Name	Role
South Unified	SBUSD	Kim Hernandez	Fiscal
	SBUSD	John Schettler	Admin
South Elem	Goleta	Conrad Tedeschi	Fiscal
Direct Services Valley	SBCEO	Kirsten Escobedo	Admin
	SYVSEC	Claudia Echevarria	Admin
North Medium Elem	Orcutt	Mary Andrade	Fiscal
North Large Elem	SMBSD	Brian King	Fiscal
North High	SMJUHSD	Frances Evans	Admin
North High	SMJUHSD	Michelle Coffin	Fiscal
SELPA	SELPA	Ray Avila	Admin
	SELPA	Rachel Wigle	Fiscal

Goals:

1) To recommend an *ongoing funding source* to fund SELPA obligations and services.

This change is needed as a result of current legislation including the redirection of Mental Health funding from SBCSELPA to LEAs.

2) Review other factors of Local Plan / Regional Program funding as requested by LEAs

## **SBCSELPA Funding Model Committee Meeting Notes**

**Tuesday, November 14, 2023 – SEE Attached Presentation**

- The agenda was introduced by Ray Avila, Executive Director, SBCSELPA
- Committee Members and Goals for today's meeting were shared by Rachel Wigle, SBCSELPA CBO. Committee members present: *John Schettler (SBUSD), Conrad Tedeschi (GUSD), Kirsten Escobedo (SBCEO), Claudia Echevarria (SYVSEC), Mary Andrade (OUSD), Brian King (SM-BSD), and Michelle Coffin (SMJUHSD)*. Committee members absent: *Kim Hernandez (SBUSD), Frances Evans (SMJUHSD)*
- Rachel reviewed with the committee the 2023-24 SB County Funds (SBCSELPA Operating Budget, Cost Pools, and Funds Distributed to LEA's) totaling \$74 million.
- Rachel reviewed the SBCSELPA Local Allocation Policy (SBCSELPA Local Plan Section 9) that includes AB602 Funds, Low Incidence Funds, Out-of-Home Care Funds, Property Taxes, and Federal IDEA Funds.
- Rachel reviewed and described how the 2023-24 SBCSELPA Budget (\$4.78 million) was developed by using existing funding sources (\$3.08 million) and the 2022-23 Ending Fund Balance (\$1.7 million). She then proposed a funding model on how to develop the 2024-25 SBCSELPA Budget that would not utilize any ending fund balances (which has historically been the process). She proposed utilizing the Out-of-Hom Care "Shared" Funds **and** Federal IDEA K-12 Funds (totaling approx. \$1.7 million) and continuing to utilize Existing Funding Sources as in the past.
- Rachel explained the Out-of-Home Care funds allocated for Short Term Residential Programs (STRTP's) would not be part of the future allocation policy. These funds (estimated at \$406,147) would be distributed to the LEA's that have students with IEPs in STRTP's and Group Homes identified within their district boundaries.
- Rachel explained the Federal IDEA Funds are projected to increase **from** \$13,370,770 (2022-23) **to** \$14,222,494 (2023-24 and 2024-25 estimates), thus allowing a portion of the increase (\$750,000) to be taken "off the top" for the 2024-25 SBCSELPA Budget.

### **Questions/Comments from Committee Members regarding the above shared information:**

- 1) ***Will there be carry over funds from the 2023-24 SB County Budget Allocation?***  
*(Response: Most likely there will not, largely in part due to the shift of mental health funds now going directly to LEA's, a decrease in what was allocated for NPS/RTC placements (\$1.9 to \$1.6 million), and an increase in NPS and WRAP services referred to SBCSELPA as in comparison to past school years)*

- 2) **Will the 2024-25 SBCSELPA Budget use carry over funds for future budget development?** (Response: Most likely there will not be carry over funds, but if there are, possibly yes)
- 3) **Will this proposed 2024-25 SBCSELPA budget be shared with SEAM/BO and/or the JPA Board as a “done deal” of what this committee came up with?** (Response: The purpose of this committee is to discuss the proposed budget, come up with long term solutions, and inevitably present a “recommendation” to SEAM/BO for discussion so we can obtain feedback, and eventually to the board for discussion and later an action item)
- 4) **Could this committee go tab-by-tab through the funding model to see in detail what resources exist and how they are being allocated?** (Response: Yes, we can do this. This will be on the agenda for the next funding model committee)
- 5) **Are the Out-of-Home Care funds being proposed for the 2024-25 SBCSELPA budget the funds that are currently allocated to LEA’s that have STRTP’s?** (Response: No, the funds generated from STRTPs will continue to be distributed out to the LEA’s)
- 6) **Will this committee be looking at shifting from County-Wide Mental Health services being funded from a Cost Pool of Funds to a “Pay-as-you-Go” or some other individual payment model?** (Response: No, not at this current time. Based upon feedback from the SBCSELPA JPA Board, we are to build a budget that ensures the “Cost Pool of Funds” remains intact. It is also noted the sentiment of the SBCSELPA JPA Board desires to keep a level of county-wide mental health services to ensure all students throughout SB County are getting their needs met)
- 7) **Who is monitoring the cost of the WRAP Team? Who hires the staff for this team? How are the numbers of cases served determined?** (Response: SBCSELPA monitors the cost of the WRAP team, the SBCSELPA Executive Director and Mental Health Manager are responsible for the recruitment, selection, and retention of the WRAP team, and the development (with JPA Board approval) of the WRAP salary schedule. There is a stringent referral process that leads to the determination if the SBCSELPA WRAP team will provide services. The number of WRAP team members can fluctuate in any given school year from 4-7 based upon referral projections and the need for services being provided. It was also noted that the WRAP team plays a proactive role, along with our 16 TLP classrooms throughout the county, in preventing students from being placed in NPS/RTC’s, thus providing a cost savings in comparison to neighboring counties. It was also shared that county-wide WRAP services use to be contracted through an agency prior to the 2019-20 school year and these services were at minimum twice the cost of employing the SBCSELPA WRAP Team).
- 8) **Do LEAs already have existing personnel that provide WRAP services that could be shared? Is it possible a feeder or neighboring LEA could be utilized rather than having a SELPA WRAP team?** Response: No. The services the WRAP team provides is very specialized, LEAs have historically contacted through an agency for these specialized services, at a higher cost, as mentioned above.

- 9) ***It was shared that ADA is decreasing, yet SPED numbers and services are increasing, thus creating a larger “contribution” rate in some LEA’s in our county, thus forcing LEA’s to look at ways to sustain current programs with less special education funds coming their way. This comment was shared in reference to how can a future SBCSELPA Budget be developed without having to utilize funding sources (ie: AB602, Out-of-Home Care, and/or Federal Funds) that could potentially go to the LEA’s.***  
*(Response: SBCSELPA understands the contribution rate and lack of SPED funds is a challenge for LEA’s attempting to maintain current programs and staff that support students with disabilities. It is also the obligation of SBCSELPA, per Local Plan language, to provide county-wide services, thus needing to develop a budget that sustains current programs as well).*

-Kirsten Escobedo, SBCEO Associate Superintendent, Special Education, shared as a new topic for the committee a proposed “Startup Cost” breakdown (\$7,472.38) for potential new Pre-K or other classrooms facilitated by SBCEO Regional Programs.

-Both Kirsten and Rachel confirmed this type of funding request from participating LEA’s in the SBCEO Regional Programs currently is not in the SBCSELPA Local Plan.

-Kirsten shared this proposal stemming from a conversation at a recent SBCSELPA JPA Board Meeting when another SBCEO Regional Program request was brought as an action item for approval.

-Kirsten also compared the proposed startup costs of two TK classrooms from the SYVSEC (\$76,512 or \$38,256 each).

**Questions/Comments from Committee Members regarding the above shared information:**

- 1) ***Why is this language being proposed for the Local Plan?*** *(Response: Due to an increase in SBCEO regional Pre-K enrollment and having to move off of LEA campuses due to making space for TK enrollment, SBCEO found it necessary to purchase various items for new classrooms being opened up prior to the 2023-24 school year. It was also explained that SBCEO annually requests for technology items to be approved by the SBCSELPA JPA Board, but being this is traditionally requested in the Spring, the window of opportunity to request startup costs had passed. The startup costs also include items that are not technology related.*
- 2) ***Why does SBCEO need this as compared to LEAs who have already paid to set up classrooms?***
  - a. *As a Regional Operator, SBCEO is a contracted provider of regional services. Therefore, the costs to run a regional program need to be reimbursed. Under the Local Plan PAY-GO model, the costs are split proportionately by LEAs using the program. As a regional operator, their costs are limited (Capped) as specified in the Local Plan. The Local Plan does not have provisions regarding the startup costs of new classrooms. The increased numbers of preschool students with*

*special needs at the same time as TK implementation has created a demand and need for space that has not been seen before. There are no longer existing resources to meet the need.*

- 3) ***Why does this have to be a set amount? I do not want to write a blank check. Could the proposed local plan language possibly state “up to \$7,500 in startup costs”?***

*(Response: Agreed. This is a good recommendation to only purchase what is needed after inquiring with other LEA's if items can be donated, thus potentially not needing the total amount of \$7,500 as a startup cost).*

- 4) ***Can the language in the Local Plan state that a regional program can request for a startup cost amount, thus providing more flexibility than a stated maximum dollar limit? This provides for changing the cost of goods over time.*** *(Response: The Committee agreed on moving forward with this proposal. Rachel and Kirsten will draft the proposed language and share with the Funding Model Committee in the near future).*

**Meeting adjourned at 4:30. Next meeting will be via zoom on Thursday, January 18, 2024 (3:00-4:30)**

# SBCSELPA FUNDING MODEL COMMITTEE

## AGENDA

- Committee Members & Goals
- SPED Allocation Policy Summary
- SELPA 23-24 Funding and 24-25 Proposal
- New Topics
  - Classroom Startup Costs – Regional Providers
  - Classroom Budget for Regional Operator Staff (Non Salary Expenditure CAPS)

## COMMITTEE MEMBERS AND GOALS

Representation	District	Name	Role
South Unified	SBUSD	Kim Hernandez	Fiscal
	SBUSD	John Schettler	Admin
South Elem	Goleta	Conrad Tedeschi	Fiscal
Direct Services Valley	SBCEO	Kirsten Escobedo	Admin
	SYVSEC	Claudia Echevarria	Admin
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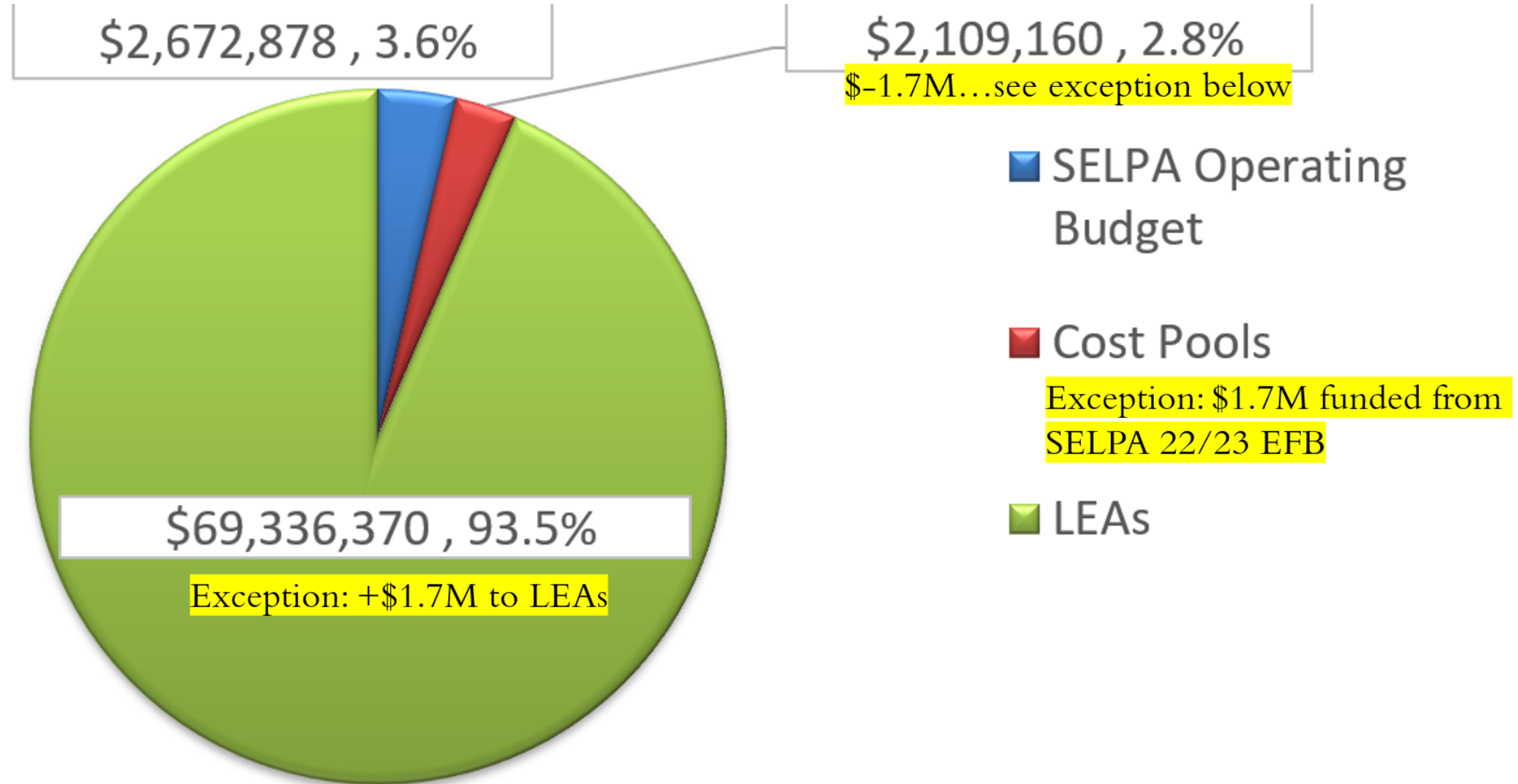
Goals:

1) To recommend an **ongoing funding source** to fund SELPA obligations and services.

This change is needed as a result of current legislation including the redirection of Mental Health funding from SBCSELPA to LEAs.

2) Review other factors of Local Plan / Regional Program funding as requested by LEAs

Special Ed Funding ~\$74 Million  
SBCSELPA Budget Total ~\$4.8 Million





# SBCSELPA LOCAL ALLOCATION POLICY

- Local Plan Section 9

- **State AB602 (~\$36.3M)**

1st: Off-the-Top SELPA Budget, MTU Housing & Sparsity Adj for Rural LEA

2nd: Remainder Allocated to LEAs based on AB602 P-2 Funded Average Daily Attendance (ADA)

- **Low Incidence (~\$1.5M)**

1st: Off the Top for Selpa-wide:

- SBCSELPA & SBCEO Audiologist
- Alternative Augmented Communication/Assisted Technology (AAC/AT) Specialist
- Set Aside Pool for LEA access for special circumstances

2nd: To LEAs by current year LI Pupil Count

- **Out-Of-Home Care → (~\$1.3M) To LEAs**

- **Property Taxes → (~\$19M) To LEAs by ADA (offsets AB602 funding)**

- **Federal IDEA Funds (~\$13.8M)**

- **Part B Local Assistance (PL-142) K-12 (\$13.3M) → to LEAs by ADA**

- **PreK (\$4.26M) → 97.12% to LEAs by ADA 2.88% to SELPA**

- **Propose using parts of Out-of-Home Care and Federal IDEA to fill funding shortfall created by Mental Health Funding Shift.**

# SBCSELPA FUNDING 23 / 24

	23/24	24/25
Budget	4.78 Million (M)	
Existing Funding Sources	\$3.08M	<ul style="list-style-type: none"> <li>• Ongoing available sources of funding.</li> <li>• Funding not currently in LEA budgets = Change is lesser impact on LEAs</li> </ul>
22/23 Ending Fund Balance	\$1.7M	
Out of Home Care Shared (Foster and Reallocated Savings)		~\$950,000
Federal IDEA K-12		~\$750,000

# SBCSELPA LOCAL ALLOCATION POLICY

## Out-Of-Home Care → Foster and Allocated Savings to SELPA

Amount	Rate	Source/Distribution	Total
453	\$ 1,608	Foster Youth	\$ 728,419
		Reallocated Savings - Proportional Share	\$ 221,145
		<b>To be distributed by ADA</b>	<b>\$ 949,564</b>
		Recommend: Change to apply to SELPA Budget for NPS Pool	
24.03	\$ 15,561	Short-Term Residential Therapeutic Program (STR)	\$ 373,932
1	\$ 3,578	Community Care	\$ 3,578
0	\$ 13,499	Intermediate Care	\$ -
1	\$ 28,637	Skilled Nursing	\$ 28,637
		<b>subtotal to specific LEAs</b>	<b>\$ 406,147</b>
		<b>Grand Total</b>	<b>\$ 1,355,711</b>

Out of Home Foster Youth and Reallocated Savings are a shared funding source that is currently not in the funding model (i.e. [not budgeted by LEAs](#)).

This leaves funding in-tact for LEAs with students in Congregate Care facilities.

# SBCSELPA LOCAL ALLOCATION POLICY

- Federal IDEA Funds Part B Local Assistance (PL-142) K-12:**

- 22-23 Grant \$13,370,770 all to LEAs (currently in funding model)
- 23-24 & 24-25 Estimated Grant Total \$14,222,494 (may be in February update)

- **Proposed 24-25:**

Off-the-top to fund SELPA;

~\$750,000 to SELPA;

Remainder to LEAs

Estimated \$13,472,496

IDEA Grant History:

Federal IDEA Funds Part B Local Assistance (PL-142) K-12 Resource 3310						
Actual				Estimated		
	20-21	21-22	22-23	23-24	24-25	
Grant Amount	\$ 12,514,553	\$ 12,759,211	\$ 13,370,770	\$ 14,222,494	\$ 14,222,494	
Increase		\$ 244,658	\$ 611,559	\$ 851,724		
% Increase		1.95%	4.79%	6.37%		

23-24 Estimate based on increased % of Omnibus appropriations bill for 23-24 school year. 24-25 flat funded.

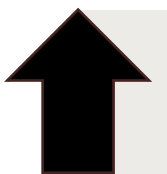
Out-of-Home Care Allocation			
		22-23 Foster	
		Baseline	
		FY 2022-23	
		ADA	
District	▼	Excl. Regiona	\$ ▼
Lompoc-Org 41		9,099	133,214.00
Manzanita-Org 74		425	6,219.00
Orcutt-Org 16		4,884	71,507.00
SM-Bonita-Org 18		16,346	239,325.00
SM High-Org 32		8,555	125,257.00
Carpinteria-Org 42		2,046	29,952.00
Goleta-Org 10		3,491	51,106.00
Hope-Org 12		894	13,095.00
SB Unified-Org 40		13,187	193,063.00
Santa Barbara Charter-Org 40		272	3,985.00
Adelante Charter-Org 77		287	4,208.00
SBCEO - Direct Svc.-Org 61		734	10,749.00
Blochman-Org 02		201	2,942.00
Family Partnership Charter-Org 76		406	5,947.00
SBCEO - Regional		-	0.00
Santa Ynez Valley Consortium-Org 04		2,793	40,886.00
Guadalupe-Org 11		1,237	18,109.00
SELPA-Org 71		-	0.00
SBCEO (non-reg./non d.s.)			0.00
		64,857	949,564.00

<i><b>Federal IDEA Funds</b></i> Part B Local Assistance (PL-142) K-12:	Baseline		
	ADA	22-23 Current	24-25 Estimated/ Proposed
District	Excl. Regional	3310	3310
Lompoc-Org 41	8,142.10	1,797,122	1,812,873
Manzanita-Org 74	424.74	82,977	78,981
Orcutt-Org 16	4,333.47	979,788	998,593
SM-Bonita-Org 18	15,603.86	3,645,535	3,765,822
SM High-Org 32	8,555.24	1,671,342	1,590,852
Carpinteria-Org 42	1,938.61	428,386	432,359
Goleta-Org 10	3,196.02	778,935	817,995
Hope-Org 12	788.66	192,213	201,851
SB Unified-Org 40	12,158.94	2,524,598	2,476,951
Santa Barbara Charter-Org 40	264.52	51,676	49,188
Adelante Charter-Org 77	273.12	53,356	50,787
SBCEO - Direct Svc.-Org 61	705.02	170,564	178,615
Blochman-Org 02	180.05	35,174	33,480
Family Partnership Charter-Org 76	406.19	79,353	75,531
SBCEO - Regional	-	0	0
Santa Ynez Valley Consortium-Org 04	2,558.21	597,699	617,430
Guadalupe-Org 11	1,209.04	282,053	291,188
SELPA-Org 71	-		750,000
SBCEO (non-reg./non d.s.)			
	60,737.79	13,370,771	14,222,496

# NEW TOPICS – CLASSROOM STARTUP COSTS (KIRSTEN ESCOBEDO)

New Preschool Classroom Startup Costs	
Cost estimates current as of 7/14/23	
Furniture	
Item	Cost
1 teacher desk	\$ 200.00
1 teacher chair	\$ 180.00
locking file cabinet- 2 drawer	\$ 145.38
Children's Factory Cube Chairs for 12	\$ 1,020.00
Half-Moon Blue Plastic Height Adjustable Activity Table	\$ 185.00
Classic Birch Cubbies & Shelves Medium Storage Unit	\$ 759.00
Classroom Space-Saver Bookcases	\$ 449.00
Step On Up! Toddler Changing Table	\$ 1,499.00
Classroom/Playroom Area Rug (8 Feet X 10 Feet)	\$ 125.00
Medicine Lock Box	\$ 55.00
Blue filters for lights	\$ 35.00
Room divider/ foam sound barrier	\$ 550.00
Estimated furniture cost	\$ 5,202.38

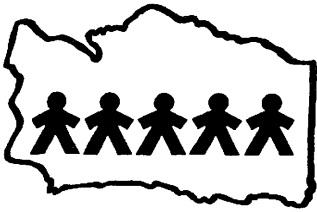
Instructional Materials	
Item	Cost
toys, sensory devices	\$ 500.00
learning games	
Estimated Instructional Material cost	\$ 500.00
Technology	
Item	Cost
desk top computer HP or Dell	\$ 1,030.00
mouse/keyboard	\$ 40.00
printer	\$ 300.00
Ipad	\$ 400.00
Estimated Tech cost	\$ 1,770.00
Total Estimated costs	\$ 7,472.38



NEW TOPICS – SYVC CLASSROOM STARTUP  
COSTS  
(KIRSTEN ESCOBEDO)

Estimated TK Classroom Setup Costs	
Supplies	\$ 7,729.00
Curriculum	\$ 18,903.00
Technology	\$ 3,262.00
Classroom Furniture	\$ 15,146.00
Playground Furniture	\$ 11,261.00
Equipment	\$ 20,211.00
	<b>\$ 76,512.00</b>





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

Date: December 4, 2023

To: SBCSELPA JPA Board

From: Jennifer Connolly, SBCSELPA Coordinator

Re: Turning 3 Years Old, Transitioning from Early Start into the Preschool Years

**BACKGROUND:**

- A booklet titled “*Turning 3 Years Old, Transitioning from Early Start into the Preschool Years*” was created in 2018 to support families in the transition from Early Start Services to Preschool Services.
- Highlights from the booklet include the change in services from Infant Family Service Plan (IFSP) to an Individualized Education Plan (IEP) and the introduction and change of service providers to school based providers.
- The current revisions were made in collaboration with Tri Counties Regional Center Children’s Team (TCRC), Alpha Family Resource Center, SBCEO, SBCSELPA and were shared at the November 17, 2023 Special Education Administrators Meeting (SEAM).
- The following updates have been made to the 2018 booklet.
  - Updated language including information on Provisional Services
  - Added: Special Education Acronyms list
  - Added: District Contact information
  - Added: Parent friendly agency resources
- This booklet will be provided to families by TCRC during the spring Early Start to Preschool transition meetings. Alpha Family Resource Center will also provide the booklet as a resource to families. The booklet will also be located on the SBCSELPA website for all families to access in Spanish and in English.
- **FISCAL IMPACT:** None.

RA/JC:lm

# Turning 3 Years Old

Transitioning From Early Start into the Preschool Years

*A Guide for Families in Santa Barbara County*



November 2023

## A Word from Parents...

As our child turns three years old and graduates from the Early Start Program, we experience another milestone to celebrate. At this time, we review the progress our child has made and look ahead to changes and new opportunities for our child, which may include receiving services in preschool, new programs, or a change in services. It may be determined that some or all specialized services that our child has been receiving through the Early Start Program are no longer needed. While this is exciting, we may also feel somewhat anxious about the changes that the process of transition to new services brings. During transition, it helps to remember that change offers new ways for us to learn and grow as individuals and as a family.

We may not be the first parents who have stated in exasperation, “Just when we know who’s who and our child is doing so well, it’s time to move on to another program!” As families leaving Early Start, we might find that we are leaving a place of comfort where we established relationships with all the people on our child’s team and we have learned to navigate the services, jargon, and the scheduling issues. Whether we feel as though we are finally just getting settled or perhaps still as if we are in a daze, a change in services can feel overwhelming. Regardless of what stage we are in, as parents, we have begun to build upon our own resources and networks of support and will continue to do so. It helps to be prepared before the transition begins.



This guide is intended to help you prepare for your child’s transition into the preschool years at age three by providing you with tools and supporting information. It was developed by early intervention specialists, preschool teachers, and parents who have experienced the transition from Early Start. Many parents will point out that this transition is usually much more difficult for the parents than it is for the child! Congratulations on this new milestone in your family’s life!

Transition is the process of change; a process or period in which something undergoes a change and passes from one state, stage, form, or activity to another.

## Tips From Parents

**Y**ou are the expert on your child. You are also a key member of your child's team. Your child's team can consist of anyone you want to have input on your child's growth and development. This includes your child's educators, care providers, health providers and, if eligible for regional center services, a Service Coordinator from Tri-Counties Regional Center of Santa Barbara County.

**Create a team for your child.** You are the team leader, and the educators, therapists, and other service providers are the other team members. Encourage open, frequent communication and cooperation amongst team members. Remember that you and your child's team can all learn together from each other. Make sure that everyone on your team is acquainted with one another by learning their names.

**Ask questions.** There is never a "dumb" question. To be prepared and informed, you must gather information and the only way to get answers to things you don't know is by asking questions. You are building your own bank of expertise by gathering information, learning from others, and utilizing resources. Use this information and add it to the knowledge you, other family members, and friends share.

**Stay organized.** Set up a simple filing system (electronic if possible), even a binder or a box will work. Some things to keep include medical records, Individualized Education Program plans (IEPs), Individualized Family Service Plans (IFSPs), regional center documents, evaluations, research and information on your child's condition/disability and business cards or other contact information for individuals working with you and your child. Additionally, create a section in your file for notes, questions, and concerns to share with your student's team. If you need guidance in organizing your child's paperwork, reach out to Alpha Family Resource Center. (See page 14 for contact information.)

**Take a friend to meetings.** When it comes to the care and advocacy of your child, it's always good to have "another set of ears" when you go to meetings or important doctors' appointments. A spouse, family member or friend can be a valuable source of help.

**Remember, you are not alone.** There are many other parents who have children with disabilities in your community who are willing to share their experiences and expertise. Network with them through support of community groups such as a Family Resource Center and other community resources. Gather information from them and then do what feels right for you. If your child is served by Tri-Counties Regional Center, reach out to your Service Coordinator. (See page 14 for contact information.)

**Don't re-invent the wheel.** You are not the first parent to have a child transition from the Early Start Program. Talk with others, visit your Family Resource Center such as Alpha Family Resource Center, and learn how others have developed successful plans for their preschool age children.

**Take care of yourself.** Accept this process as part of your life and don't let it overwhelm you. Keep life in balance. Good health requires that you take some time for yourself, your partner, friends, and family.



### **Turning 3: What an Exciting Time!**

Early Start services provide early intervention for infants and toddlers birth to age 3. Until now, your child has been enrolled in the Early Start Program. This guide has been given to you to help you prepare for and participate in this important transition from Early Start services to services provided to preschool age children in your community.

#### **At Age 2**

When your child turns two, it is an ideal time to begin thinking about what programs or services you would like your child to participate in after his or her third birthday. You may want to talk with your child's teacher(s) or early intervention service providers and your Tri-Counties Regional Center (TCRC) Early Childhood Service Coordinator about:

- Services for preschool age children in your community.
- Preschool alternatives, eligibility, and availability.
- How to choose quality early childhood care and education programs for your child.
- Preschool services for children with disabilities.
- Eligibility criteria for programs you may be interested in learning more about.
- Visiting preschools in your area.
- How to contact other parents who have gone through the Early Start transition process.
- How to contact your local Family Resource Center for information, resources, and referral.
- Transition process and timeline you and your child's team will follow before and after your child turns three years old.
- The types of services you think your child may or may not need after turning three years old.
- Write down notes, questions, and concerns about your child to share with your providers.

#### **By Age 2.9 (33 months)**

When your child is between 2.3-2.9 (between 27 to 33 months) a transition meeting will be held to discuss the transition from Early Start Services. With your written consent, a representative from your school district in Santa Barbara County may be asked to attend the meeting to discuss preschool program options. Other meeting participants will be your Tri-Counties Regional Center (TCRC) Early Childhood Service Coordinator and anyone else you wish to attend including your child's current early intervention specialists. This is a good time for you to learn about preschool options in your community as well as special education support services your child may be eligible to receive. You may also learn during this meeting what types of further evaluations and assessments will be needed to determine eligibility for services at age three and when they will need to be conducted. Make sure you give input about your child by completing the forms and questionnaires provided to you by the school. The information you provide through the forms and questionnaires be included in the assessment report for your child.

### **Almost 3**

Before your child's third birthday a final Individualized Family Service Plan (IFSP) meeting will be held. At this time one of the following will be determined:

- a) Your child will be transitioning from the Early Start program, which ends effective the child's third birthday. A final meeting will be held to review the Infant Family Service Plan (IFSP) and to review for the last time the Early Start assessment, ending Early Start services as of the third birthdate.

Following the evaluation through the regional center, your child's case management with the regional center ends Early Start services at age 3 due to no concern of significant delays or developmental disability.

Or

Following an evaluation through the regional center, your child's case management with the regional center will continue services through an Individual Program Plan (IPP). An IPP is provided to students who continue to qualify for regional center services under the regional center eligibility criteria.

- b) If school services are recommended and your child is found eligible for an Individual Education Plan (IEP), then the school will organize their related services and supports moving forward.

### **Preschool Services**

Your child's early intervention specialist and your TCRC Early Start Service Coordinator will help you learn about the preschool services that are available in your community. You may already be aware of some public or private programs that will meet your child's needs. This may include Head Start, State Preschools, and private preschool programs that may include childcare options as part of their services. These programs are open to all children, but may have enrollment fees, financial or other eligibility criteria. If your child is eligible for an IEP and if you choose to have your child attend a private preschool, services provided by the school district may vary. Students attending a private preschool may be eligible for an Individualized Service Plan or "ISP." Families will want to discuss the ISP with the school district and private school.



### **IEP: Individualized Education Program Plan**

If your child's school team determines that your child needs special education support services after his or her third birthday, an Individualized Education Program Plan (IEP) will be developed. You and your child's team will develop the IEP together. The IEP will describe:

- Your child's current strengths and abilities.
- The developmental goals you would like your child to achieve during the following year.
- The specialized support services your child will receive from the district to help him or her meet these goals.
- The locations and frequencies of services to be provided.

The IEP will be reviewed at an annual meeting, but if you have questions, concerns, or wish to make changes to the IEP, you can ask for an IEP meeting to be held at any time. Remember that the IEP is a written agreement between you and the other members of your child's planning team, so it is important to ask questions, be involved, and fully understand the contents of your child's IEP.

How these services are provided, including frequency, hours per week, and location is determined by you and your child's team and described in the written Individualized Education Plan (IEP). The level of services your child needs may determine where the services are best provided. These are some of the things you will want to discuss throughout the transition process so that you are prepared to make final decisions at the time of your child's IEP meeting.





## **Tri-Counties Regional Center and Your Child's Individualized Program Plan**

**B**efore your child's third birthday, your Tri-Counties Regional Center (TCRC) Early Childhood Service Coordinator will begin the process of determining whether or not your child will be eligible to receive TCRC services after he or she turns three. Many children who transition from Early Start services are no longer eligible for regional center services.

Some parents ask why a change in services must take place at age three. The Early Start Program provides early intervention services to help children birth to age three that may have a developmental delay or disability. Many times, early intervention helps the child develop to a level where there is no longer a delay or a need for further intervention. Other times, a child may continue to have delays in different areas and may continue to need special education support for academic purposes. Under these circumstances, the child does not require the types of lifelong services provided by regional centers. Children who have a developmental disability as defined by the Lanterman Act may continue to be eligible for regional center services at the age of three. Because Early Start services end at age three, this transition period is an important time to assess the child's needs and determine, as best you can at this time, what his or her future needs may be and how to access appropriate services accordingly.

With your permission, a medical and/or psychological evaluation may be given to your child to help determine eligibility. You may also want to ask about other available assessments to re-evaluate your child's progress following the early intervention he or she has received thus far, or to evaluate additional needs. Let your pediatrician or primary care providers know about this process.

If your child continues to be served by TCRC after his or her third birthday, you will continue to work with a Service Coordinator assigned to your child's case. The Service Coordinator will work with you to develop an Individualized Program Plan (IPP). This plan is like the Individualized Education Program plan (IEP) because it will describe what your child is able to do now, what you want your child to do in the future, and what services will be provided to help your child meet these goals. The Individualized Program Plan or "IPP" focuses on your child's goals outside of school and the Individualized Education Program plan (IEP) focuses upon your child's academic or educational goals while in school. It is important to note, however, that the IPP will include the school information, summarize parent's preferred goals the IEP supports, and outcomes. Your Service Coordinator will help you to discuss goals when you work together to develop your child's IPP.

A child may qualify for provisional eligibility for regional center services without needing a diagnosis of developmental disability as specified in the W&I Code section 4512(a) (1). Provisional eligibility is for a child with significant functional limitations in at least two major life activities to have additional monitoring up until the 5<sup>th</sup> birthdate when provisional eligibility for all children ends. A child has an IPP in place and may obtain similar services of someone with a developmental diagnosis, except for qualifying for specific programs such as institutional deeming and self-determination. Regional Center will re-assess a child prior to the 5<sup>th</sup> birthdate. Some cases close at the 5<sup>th</sup> birthdate, whereas some children are found eligible for continued services.

A watercolor illustration featuring a butterfly on the right side, with wings in shades of pink, purple, and yellow, and white veins. On the left side, there are two blue and green flowers with long stems and leaves. The background is white with scattered watercolor splatters in blue, green, and pink. A rectangular box with a black border is centered on the page, containing the text.

## Resources

The following pages contain some basic resources. It is not intended to be a directory of all resources available, but rather a simple informational guide to help you keep connected to valuable local resources.

### **Questions & Answers**

Q: What is transition?

A: Transition is change or movement from one program or service to another. If your child is receiving Early Start services and is turning 3 years old, he or she is ready to transition to another program or services.

Q: Why must my child transition on his or her 3<sup>rd</sup> birthday?

A: At age 36 months, your child is no longer eligible for Early Start according to federal law – the Individuals with Disabilities Education Act (IDEA), Part C. However, your child may be eligible for services under IDEA, Part B, or for other preschool services in your community.

Q: What are some of the questions I may be asking at the transition meeting?

A: Some of the frequently asked questions you may want to ask are listed below:

- What are the community-based or specialized preschool options for children?
- What is the difference between an Individualized Family Service Plan (IFSP) and the Individualized Education Plan (IEP)?
- Will my child have a Service Coordinator or a Case Manager? If so, who?
- Who are the agencies who will be involved in my child's program?
- How many children and teachers will be in my child's program?
- How long is the school day or class and what is the daily routine of the program?
- Will my child participate with other children who do not have a disability?
- Will I be responsible for transporting my child to and from the program?
- What if I do not want my child to participate in a preschool program?

Q: What choices do I have for my child after his or her 3<sup>rd</sup> birthday?

A: There may be many settings in your community that will meet your child's needs, such as:

- Public and private preschools/childcare centers, or school readiness programs
- Family childcare homes
- School pre-kindergarten programs
- Other community-based public or private programs

Q: Will I be responsible for the transportation of my child to and from services?

A: Transportation is an IEP team discussion.

### **Comparing Individualized Plans: How Different Plans Measure Up**

Name of Plan	Individualized Family Service Plan (IFSP)	Individualized Program Plan (IPP)	Individualized Education Plan (IEP)
Timeline of Plan	Birth to Age 3	Age 3 and throughout lifespan based on eligibility status.	Age 3 through 22
Purpose of Plan	To assist families and their children with disabilities to meet developmental goals.	Qualifying individuals are eligible for comprehensive services and supports to the extent they are not provided by generic agencies.	Implementation of special education and related services when a child qualifies for special education support.
Plan Components	<ul style="list-style-type: none"> <li>• Family concerns and desired.</li> <li>• Priorities/preferences.</li> <li>• Child and family's strengths.</li> <li>• Child's present levels of development and current abilities.</li> <li>• Child and family goals and outcomes.</li> <li>• Services:               <ul style="list-style-type: none"> <li>○ Frequency</li> <li>○ Site/Location</li> <li>○ Begin/End date.</li> </ul> </li> <li>• People responsible for implementation.</li> <li>• Sources of funding for identified services.</li> </ul>	<ul style="list-style-type: none"> <li>• Child's strengths, interests, and what is important the child.</li> <li>• Goals related to home, health, school, community.</li> <li>• Identification of the nature of supports and funding sources family, health, insurance, school, or regional center.</li> <li>• Start and end dates of goals, services and the IPP.</li> </ul>	<ul style="list-style-type: none"> <li>• Present levels of educational performance.</li> <li>• School-related goals and outcomes.</li> <li>• Educational and associated services:               <ul style="list-style-type: none"> <li>○ Frequency</li> <li>○ Site/Location</li> <li>○ Begin/End dates.</li> </ul> </li> <li>• People responsible for implementation.</li> <li>• The extent to which your child will participate with other children with and without disabilities in the school environment.</li> <li>• Whether your child will participate in state and district-wide tests, with or without accommodations, or have an alternative assessment.</li> </ul>

## **Acronyms and Terms Used in This Guide**

### **Alpha Resource Center:**

Lifespan Support Services provides services and supports for individuals and families who have children with intellectual and similar developmental disabilities or children who may be at risk of developmental delay and other disabilities. All it takes is a phone call or email to get started.

### **Early Start:**

In California, infants, and toddlers from birth to 36 months may be eligible for early intervention services provided through the Early Start Program if, through documented evaluation and assessment, they meet one of the criteria listed below:

- Have a 25% developmental delay in either cognitive, communication, social or emotional, adaptive, or physical and motor development including vision and hearing; or
- Have established risk conditions of known etiology, with a high probability of resulting in delayed development; or are at high risk of having a substantial developmental disability due to a combination of risk factors.

### **Family Resource Center (FRC):**

Family Resource Centers are community-based or school-based, flexible, family-focused, and culturally sensitive hubs of support and resources that provide programs and targeted services based on the needs and interests of families.

### **Family Empowerment Center (FEC):**

Special Education System Navigation, Support, Training, Mentoring, Access to Public Benefits, Transition and Futures Planning. Contact Meghan Davy for more information.

[mdavy@alphasb.org](mailto:mdavy@alphasb.org)

### **Help Me Grow Santa Barbara County:**

Building coordinated systems of care to ensure early identification of children with developmental delays or who are at risk of disability through partnering, closed loop referrals between child health providers, schools, early care programs, early intervention services with follow-up.

### **Individualized Education Program (IEP):**

Each public-school child who receives special education and related services must have an Individualized Education Program (IEP). Each IEP must be designed for one student and must be a truly individualized document. The IEP creates an opportunity for teachers, parents, school administrators, related services personnel, students, and others the family may wish to participate, including care providers, friends, and other family members, to work together to improve educational results for children with disabilities. The IEP is the cornerstone of a quality education for each child with a disability. The Individualized Education Plan is the written document describing the individualized education program. The IEP meeting is held annually, or when a change in services is desired or upon family or service provider request.

Individualized Family Service Plan (IFSP):

A plan written to document the delivery of community-based, specialized, interagency services to families with infants or toddlers, birth to age three with developmental disabilities or who may be at risk of developmental delay. The IFSP identifies the Early Start services a child receives. It includes the priorities of the family, family resources, and future goals. It is reviewed every six months or upon family or service provider request.

Individualized Program Plan (IPP):

A child over the age of 3 who will receive services from Tri-Counties Regional Center will have an Individualized Program Plan (IPP). This is developed by parents, the child, the service coordinator and any other the family consents to participate in the planning process. The IPP describes what the child can do at present, goals for the future, and the services and supports suggested to help the child achieve their goals. The IPP focuses upon goals outside of school and the IEP focuses on academic goals worked on in the school setting. Having a good, functioning IEP is one part of your child's overall IPP. Reviewed annually or upon family request.

Individual Service Plan (ISP):

A written plan created by a public school and private school to provide individual supports to a child found eligible for special education services.

Santa Barbara County Education Office (SBCEO):

The Santa Barbara County Education Office provides service and leadership to 20 public school districts and 10 charter schools. SBCEO offers 200 distinct programs and services in support of nearly 70,000 children throughout Santa Barbara County. Our local partnerships, non-profits, and programs reflect a collective community belief in the value of public education.

SBCEO is one of 58 county offices in California. County offices support local school districts by providing services that can be delivered more efficiently and economically at the county level. These include implementing new standards, staff development and training programs; fiscal support for districts including payroll; designing business and personnel systems; and performing many other services to meet the changing needs of local school districts. County offices of education also provide a wide range of instructional programs, including special education, early childhood education, career and technical education, programs for youth at risk, and instruction in juvenile detention facilities.

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

SELPA stands for Special Education Local Plan Area. SELPAs are made up of school districts and county offices of education within geographic areas. The Santa Barbara County SELPA is made up of all school districts in Santa Barbara County and includes the Santa Barbara County Education Office (SBCEO). These coordinated educational entities have joined together to provide a full range of services to students with disabilities.

Tri-Counties Regional Center (TCRC):

The state of California contracts with Tri-Counties Regional Center (TCRC) to provide supports and services for children and adults with developmental disabilities living in San Luis Obispo, Santa Barbara, and Ventura Counties. These services can cover the life span of individuals, from early assessment and intervention for infants and young children, school-age children, transition-age young adults' recreational, employment and residential needs to the residential, service, and medical needs of adults and seniors.

For more information on acronyms, special education jargon, parental rights, or other resources, contact your Service Coordinator or call Alpha Family Resource Center of Santa Barbara. (See page 14 for contact information.)




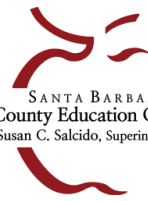




## Contact Information

<p>Alpha Family Empowerment Center of Santa Barbara County:</p> <p>Alpha Family Resource Center of Santa Barbara County provides services and supports for individuals and families who have children with intellectual and similar developmental disabilities who may be at risk of developmental delay located throughout Santa Barbara County</p>	<p>Website: <a href="https://alphafrc.org/">https://alphafrc.org/</a></p> <p>Address: 520 East Montecito Street, Santa Barbara, California 93103, United States</p> <p>805-452-8789</p> <p>Hours: Monday through Friday, 9:00 a.m.-5:00 p.m.</p>
<p>Santa Barbara County Education Office (SBCEO):</p> <p>The Santa Barbara County Education Office provides service and leadership to 20 public school districts and 10 charter schools. SBCEO offers 200 distinct programs and services in support of nearly 70,000 children throughout Santa Barbara County. Our local partnerships, non-profits, and programs reflect a collective community belief in the value of public education.</p> <p>SBCEO is one of 58 county offices in California. County offices support local school districts by providing services that can be delivered more efficiently and economically at the county level. These include implementing new standards, staff development and training programs; fiscal support for districts including payroll; designing business and personnel systems; and performing many other services to meet the changing needs of local school districts. County offices of education also provide a wide range of instructional programs, including special education, early childhood education, career and technical education, programs for youth at risk, and instruction in juvenile detention facilities.</p>	<p>Website: <a href="https://www.sbceo.org">https://www.sbceo.org</a></p> <p>Mailing Address: P.O. Box 6307 Santa Barbara, CA 93160-6307</p> <p>Address: 4400 Cathedral Oaks Rd. Santa Barbara, CA 93160-6307</p> <p>(805) 964-4711</p> <p>Hours: Monday through Friday, 8:00 a.m.-5:00 p.m.</p>



<p>Santa Barbara County Special Education Local Plan Area (SBCSELPA):</p> <p>The Santa Barbara County SELPA (SBCSELPA) and its member districts actively seek out all individuals with disabilities, ages birth through 22, including infants and children enrolled in parentally placed private schools. Special education programs are available to all eligible students with disabilities, ages birth to 22 in Santa Barbara County.</p> <p>If you are concerned about your child's development or have reason to believe your child needs special education due to a physical, mental, emotional, learning or speech problem, you may contact either the SELPA office or your local school district Special Education Department if you have questions about referring a child for special education services.</p>	<p>Website: <a href="https://sbcselfpa.org">https://sbcselfpa.org</a></p> <p>Address: 5385 Hollister Avenue Building 7, Box 107 Santa Barbara, CA 93111</p> <p>(805) 683-1424</p> <p>Hours: Monday through Friday, 8:00 a.m.-5:00 p.m.</p>
<p>Tri-Counties Regional Center:</p> <p>Tri-Counties Regional Center is one of twenty-one non-profit regional centers in California providing lifelong services and supports for people with developmental disabilities residing in San Luis Obispo, Santa Barbara, and Ventura Counties.</p>	<p>Website: <a href="http://www.tri-counties.org/tcrc3/">www.tri-counties.org/tcrc3/</a></p> <p>Address: 520 E. Montecito St Santa Barbara, CA 93103 (805) 962-7881</p> <p>1234 Fairway Dr. Santa Maria, CA 93455 (805) 922-4640</p> <p>Hours: Monday through Friday, 8:00 a.m.-5:00 p.m.</p>
  <p>Tri-Counties Regional Center</p>	 <p>Santa Barbara County Special Education Local Plan Area</p>  <p>SANTA BARBARA County Education Office Susan C. Salcido, Superintendent</p>

**Santa Barbara County 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 County Education Office	805-964-4711
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

## **My Child's Early Start Team**

Name: Title: Agency: Phone: Notes:	Name: Title: Agency: Phone: Notes:
Name: Title: Agency: Phone: Notes:	Name: Title: Agency: Phone: Notes:
Name: Title: Agency: Phone: Notes:	Name: Title: Agency: Phone: Notes:
Name: Title: Agency: Phone: Notes:	Name: Title: Agency: Phone: Notes:

## My Child's Preschool Team

Name: Title: Agency: Phone: Notes:	Name: Title: Agency: Phone: Notes:
Name: Title: Agency: Phone: Notes:	Name: Title: Agency: Phone: Notes:
Name: Title: Agency: Phone: Notes:	Name: Title: Agency: Phone: Notes:
Name: Title: Agency: Phone: Notes:	Name: Title: Agency: Phone: Notes:

## **Thank you to the following contributing Agencies!**

Alpha Resource Center:

Gina Stabile

Meghan Davy

Help Me Grow:

Patty Moore

Parents of Special Education:

Dena Davis

Mariana Murillo

Norma Puga

Carrie McKiddie

Santa Barbara County Education Office:

Kirsten Escobedo

Armando Uribe

Ashley Johnson

Andy Evans

Santa Barbara County SELPA:

Jennifer Connolly, SBCSELPA

Brian Helt, SBCSELPA

Tri-Counties Regional Center:

Alisa Eschenbach

Tamika Harris

Eulalia Apolinar

Updated November 2023

# Turning 3 Years Old

Transitioning From Early Start into the Preschool Years

*A Guide for Families in Santa Barbara County*



*November 2023*

## A Word From Parents...

**A**s our child turns three years old and graduates from the Early Start Program, we experience another milestone to celebrate. At this time, we review the progress our child has made and look ahead to changes and new opportunities for our child, which may include receiving services in preschool, new programs, or a change in services. It may be determined that some or all specialized services that our child has been receiving through the Early Start Program are no longer needed. While this is exciting, we may also feel somewhat anxious about the changes that the process of transition to new services brings. During transition, it helps to remember that change offers new ways for us to learn and grow as individuals and as a family.

We may not be the first parents who have stated in exasperation, “Just when we know who’s who and our child is doing so well, it’s time to move on to another program!” As families leaving Early Start, we might find that we are leaving a place of comfort where we established relationships with all the people on our child’s team and we have learned to navigate the services, jargon, and the scheduling issues. Whether we feel as though we are finally just getting settled or perhaps still as if we are in a daze, a change in services can feel overwhelming. Regardless of what stage we are in, as parents, we have begun to build upon our own resources and networks of support and will continue to do so. It helps to be prepared before the transition begins.



This guide is intended to help you prepare for your child’s transition into the preschool years at age three by providing you with tools and supporting information. It was developed by early intervention specialists, preschool teachers, and parents who have experienced the **graduation transition** from Early Start. Many parents will point out that this transition is usually much more difficult for the parents than it is for the child! Congratulations on this new milestone in your family’s life!

Transition is the process of change; a process or period in which something undergoes a change and passes from one state, stage, form, or activity to another.

## Tips From Parents

**Y**ou are the expert on your child. You are also a key member of your child's team. Your child's team can consist of anyone you want to have input on your child's growth and development. This includes your child's educators, care providers, health providers and, if eligible for **Regional Center** services, a Service Coordinator from Tri-Counties Regional Center **of Santa Barbara County**.

**Create a team for your child.** You are the team leader and the educators, therapists, and other service providers are the other team members. Encourage open, frequent communication and cooperation amongst team members. Remember that you and your child's team can all learn together from each other. Make sure that everyone on your team is acquainted with one another by learning their names.

**Ask questions.** There is never a "dumb" question. To be prepared and informed, you must gather information and the only way to get answers to things you don't know is by asking questions. You are building your own bank of expertise by gathering information, learning from others, and utilizing resources. Use this information and add it to the knowledge you, other family members, and friends share.

**Stay organized.** Set up a simple filing system (electronic if possible), even a binder or a box will work. Some things to keep include medical records, Individualized Education Program plans (IEP), Individualized Family Service Plans (IFSP), regional center documents, evaluations, research and information on your child's condition/**disability** and business cards or other contact information for individuals working with you and your child. ***Additionally, create a section in your file for notes, questions, and concerns to share with your student's team. If you need guidance in organizing your child's paperwork, reach out to Alpha Family Resource Center. (See page 13 for contact information.)***

**Take a friend to meetings.** When it comes to the care and advocacy of your child, it's always good to have "another set of ears" when you go to meetings or important doctors' appointments. A spouse, family member or friend can be a valuable source of help.

**Remember, you are not alone.** There are many other parents who have children with disabilities in your community who are willing to share their experiences and expertise. Network with them through support ***of community groups such as a Family Resource Center*** resource centers and other community resources. Gather information from them and then do what feels right for you. ***If your child is served by Tri-Counties Regional Center, reach out to your Service Coordinator. (See page 13 for contact information.)***

**Don't re-invent the wheel.** You are not the first parent to have a child graduate **transition** from the Early Start Program. Talk with others, visit your ***Family Resource Center such as Alpha Family Resource Center***, and learn how others have developed successful plans for their preschool age children.



**Take care of yourself.** Accept this process as part of your life and don't let it overwhelm you. Keep life in balance. Good health requires that you take some time for yourself, your partner, friends, and family.

### **Turning 3: What an Exciting Time!**

Early Start services provide early intervention for infants and toddlers birth to age 3. Until now, your child has been enrolled in the Early Start Program. This guide has been given to you to help you prepare for and participate in this important transition from Early Start services to services provided to preschool age children in your community.

#### **At Age 2**

When your child turns two, it is an ideal time to begin thinking about what programs or services you would like your child to participate in after his or her **third** birthday. You may want to talk with your child's teacher(s) or early intervention service providers and your Tri-Counties Regional Center (TCRC) **Early Childhood Service Coordinator** about:

- Services for preschool age children in your community
- Preschool alternatives, eligibility and availability
- How to choose quality early childhood care and education programs for your child
- Preschool services for children with disabilities
- Eligibility criteria for programs you may be interested in learning more about
- Visiting preschools in your area
- How to contact other parents who have gone through the Early Start transition process
- How to contact your local family resource center **Family Resource Center** for information, resources, and referral
- Transition process and timeline you and your child's team will follow before and after your child turns three years old
- The types of services you think your child may or may not need after turning three years old
- **Write down notes, questions and concerns about your child to share with your providers**

#### **By Age 2.9 (33 months) and A Half**

When your child is 2½ (30 months of age), **between 2.3-2.9 (between 27 to 33 months)** a **transition** meeting will be held to discuss the transition from Early Start Services. This is also called a "30 month Transition IFSP meeting". If it is anticipated that your child will be receiving specialized preschool services, **With your written consent, a** representative from your school district in Santa Barbara County **may be** asked to attend **the meeting** ~~this meeting~~ to discuss preschool program options. Other meeting participants ~~may~~ **will** be your Tri-Counties Regional Center (TCRC) **Early Childhood Service Coordinator** and anyone else you wish to attend including your child's current early intervention **specialists**. This is a good time for **you** to learn about preschool options in the **your** community as well as special education support services your child may be eligible to receive. You may also learn during this meeting what types of further evaluations and assessments will be needed to determine eligibility for services at age three and when they will need to be conducted. ~~Make sure you are present for and involved in all assessments for your child.~~ **Make sure you give input**

*about your child by completing the forms and questionnaires provided to you by the school. The information you provide through the forms and questionnaires be included in the assessment report for your child*

### Almost 3

Within the month **B**efore your child's third birthday a final Individualized Family Service Plan (IFSP) meeting will be held. At this time one of the following will be determined:

- a) *Your child will be transitioning from the Early Start program, which ends effective the third birthday. A final meeting will be held to review the Infant Family Service Plan (IFSP) and to review for the last time the Early Start assessment, ending Early Start services as of the third birthdate.*

*Following the evaluation through the regional center, your child's case management with the regional center ends at age 3 due to no concern of significant delays or developmental disability.*

*Or*

*Following an evaluation through the regional center, your child's case management with the regional center will continue through an Individual Program Plan (IPP). An IPP is provided to students who continue to qualify for regional center services under the regional center eligibility criteria.*

- b) *If school services are recommended and your child is found eligible for an Individual Education Plan (IEP), then the school will organize their related services and supports moving forward.*

Take out:

- e) ~~Your child no longer needs specialized services from Tri-Counties Regional Center based on the assessments that were performed, and the Infant Family Service Plan (IFSP) will be closed and a final IFSP will be held to review the final Early Start Assessment and to close the Early Start Services effective the third birthday.~~
- d) ~~At the final IFSP, participants will discuss options for ongoing Tri-Counties Regional Center services. For if your child is eligible for services from Tri-Counties Regional Center after the age of three. If eligible an Individual Program Plan (IPP) will be developed prior to the third birthday. Please see pages 6, 9, and 11 for more information regarding the Individualized Education Plan (IEP) and Individualized Program Plan (IPP).~~
- e) ~~Early Start services will transition to school services upon the third birthday.~~

~~f) Your child will benefit from special education supports during the preschool years. If you and your team proceed with this determination, an Individualized Education Plan (IEP) will be developed by your child's third birthday.~~

~~g)~~

## Preschool Services

**Y**our child's early intervention specialist and your TCRC Early Start Service Coordinator will help you learn about the preschool services that are available in your community. You may already be aware of some public or private programs that will meet your child's needs. This may include Head Start, State Preschools, and private preschool programs that may include child care options as part of their services. These programs are open to all children, but may have enrollment fees, financial or other eligibility criteria. ***If your child is eligible for an IEP and if you choose to have your child attend a private preschool, services provided by the school district may vary. Students attending a private preschool may be eligible for an Individualized Service Plan or "ISP." Families will want to discuss the ISP with the school district and private school.***

### IEP: Individualized Education Program Plan

If you and your child's team ***If your child's school team*** determines that your child is in need of special education support services after his or her third birthday, an Individualized Education Program Plan (IEP) will be developed. You and your child's team will develop the IEP together. The IEP will describe:

- Your child's current strengths and abilities
- The developmental goals you would like your child to achieve during the following year
- The specialized support services your child will receive from the district to help him or her meet these goals
- The locations and frequencies of services to be provided

The IEP will be reviewed at an annual meeting, but if you have questions, concerns, or wish to make changes to the IEP, you can ask for an IEP meeting to be held at any time. Remember that the IEP is a written agreement between you and the other members of your child's planning team, so it is important to ask questions, be involved, and fully understand the contents of your child's IEP.

How these services are provided, including frequency, hours per week, and location is determined by you and your child's team and described in the written Individualized Education Plan (IEP). The level of services your child needs may determine where the services are best provided. These are some of the things you will want to discuss ***before your child's third***

birthday and throughout the transition process so that you are prepared to make final decisions at the time of your child's IEP meeting.



## Tri-Counties Regional Center and Your Child's Individualized Program Plan

**B**efore your child's third birthday, your Tri-Counties Regional Center (TCRC) Early Childhood Service Coordinator will begin the process of determining whether or not your child will be eligible to receive TCRC services after he or she turns three. Many children who ~~graduate~~ **transition** from Early Start services are no longer eligible for Regional Center services.

Some parents ask why a change in services must take place at age three. The Early Start Program provides early intervention services to help children birth to age three that may have a developmental delay or disability. Many times, early intervention helps the child develop to a level where there is no longer a delay or a need for further intervention. Other times, a child may continue to have ~~a mild delay in one or two~~ **delays in** different areas and may continue to need special education support for academic purposes. Under these circumstances, the child does not require the types of lifelong services provided by Regional Centers. Children who have a developmental disability as defined by the Lanterman Act may continue to be eligible for **R**egional **C**enter services at **the** age of three. Because Early Start services end at age three, this transition period is an important time to assess the child's needs and determine, as best you can at this time, what his or her future needs may be and how to access appropriate services accordingly.

With your permission, a medical and/or psychological evaluation may be given to your child to help determine eligibility. You may also want to ask about other available assessments to re-evaluate your child's progress following the early intervention he or she has received thus far, or to evaluate additional needs. Let your pediatrician or primary care providers know about this process.

If your child **continues** to be served by TCRC after his or her third birthday, ~~you will have a new~~ **you will continue to work with a** Service Coordinator assigned to your child's case. The Service Coordinator will work with you to develop an Individualized Program Plan (IPP). This plan is similar to the Individualized Education Program plan (IEP) because it will describe what your child is able to do now, what you want your child to do in the future, and what services will be provided to help your child meet these goals. The Individualized Program Plan or "IPP" focuses on your child's goals outside of school and the Individualized Education Program plan (IEP) focuses upon your child's academic or educational goals while in school. It is important to note, however, that the IPP will include the school information, summarize parent's preferred goals the IEP supports, and outcomes. Your **Early Start** Service Coordinator will help you to discuss goals when you work together to develop your child's IPP.

**A child may qualify for provisional eligibility for regional center services without needing a diagnosis of developmental disability as specified in the W&I Code section 4512(a) (1). Provisional eligibility is for a child with significant functional limitations in at least two major life activities for the child to have additional monitoring up until the 5<sup>th</sup> birthdate when provisional eligibility for all children ends. A child has an IPP in place and may obtain similar**



services of someone with a developmental diagnosis, with the exception of qualifying for specific programs such as institutional deeming and self-determination. Regional Center will re-assess a child prior to the 5<sup>th</sup> birthdate. Some cases close at the child's 5<sup>th</sup> birthday, whereas some children are found eligible for continued services.



### Resources

The following pages contain some basic resources. It is not intended to be a directory of all resources available, but rather a simple informational guide to help you keep connected to valuable local resources.

## Questions & Answers

Q: What is transition?

A: Transition is change or movement from one program or service to another. If your child is receiving Early Start services and is turning 3 years old, he or she is ready to transition to another program or services.

~~Q: When does this transition process begin? (TAKE OUT)~~

~~A: The transition process begins as close as possible to your child's second birthday.~~

- ~~• Your child's service coordinator will begin to discuss transition when your child is 2 years old. At this time you will also want to be thinking about what programs or services you would like your child to participate in after he or she turns 3.~~
- ~~• When your child is 2 ½ (30 months) a Transition IFSP meeting will be held. The purpose of this meeting is for you and the other team members to determine which program will be best for your child and family, after looking at all the possibilities.~~
- ~~• A final IFSP meeting will be held within a month of your child's 3<sup>rd</sup> birthday.~~

Q: Why must my child transition on his or her 3<sup>rd</sup> birthday?

A: **After** ~~At~~ age 36 months, your child is no longer eligible for Early Start according to federal law – the Individuals with Disabilities Education Act (IDEA), Part C. However, your child may be eligible for services under IDEA, Part B, or for other preschool services in your community.

Q: What are some of the questions I may be asking at the transition meeting?

A: Some of the frequently asked questions you may want to ask are listed below:

- What are the community-based or specialized preschool options for children?
- What is the difference between an Individualized Family Service Plan (IFSP) and the Individualized Education Plan (IEP)?
- Will my child have a Service Coordinator or a Case Manager? If so, who?
- Who are the agencies who will be involved in my child's program?
- How many children and teachers will be in my child's program?
- How long is the school day or class and what is the daily routine of the program?
- Will my child participate with other children who do not have a disability?
- Will I be responsible for transporting my child to and from the program?
- What if I do not want my child to participate in a preschool program?

Q: What choices do I have for my child after his or her 3<sup>rd</sup> birthday?

A: There may be many settings in your community that will meet your child's needs, such as:

- Public and private preschools/childcare centers, or school readiness programs
- Family childcare homes
- School pre-kindergarten programs
- Other community-based public or private programs



Q: Will I be responsible for the transportation of my child to and from services?

A: Transportation is an IEP team discussion.

## Comparing Individualized Plans: How Different Plans Measure Up

Name of Plan	Individualized Family Service Plan (IFSP)	Individualized Program Plan (IPP)	Individualized Education Plan (IEP)
Timeline of Plan	<u><b>Birth to Age 3</b></u>	Age 3 <u><b>and throughout lifespan based on eligibility status.</b></u>	Age 3 through 22
Purpose of Plan	To assist families and their children with disabilities to meet developmental goals	Qualifying individuals are eligible for comprehensive services and supports to the extent they are not provided by generic agencies	Implementation of special education and related services when a child qualifies for special education support
Plan Components	<ul style="list-style-type: none"> <li>Family concerns and desired priorities/preferences</li> <li>Child and family's strengths</li> <li>Child's present levels of development and current abilities</li> <li>Child and family goals and outcomes</li> <li>Services:               <ul style="list-style-type: none"> <li>Frequency</li> <li>Site/Location</li> <li>Begin/End date.</li> </ul> </li> <li><u>Parties</u> <b>People</b> responsible for implementation</li> <li>Sources of funding for identified services</li> </ul>	<ul style="list-style-type: none"> <li><u><b>Child's strengths, interests, and what is important the child</b></u></li> <li><u><b>Goals related to home, health, school, community</b></u></li> <li><u><b>Identification of the nature of supports and funding sources family, health, insurance, school, or regional center</b></u></li> <li><u><b>Start and end dates of goals, services and the IPP.</b></u></li> </ul>	<ul style="list-style-type: none"> <li>Present levels of educational performance</li> <li>School-related goals and outcomes</li> <li>Educational and associated services               <ul style="list-style-type: none"> <li>Frequency</li> <li>Site/Location</li> <li>Begin/End dates.</li> </ul> </li> <li><u>Parties</u> <b>People</b> responsible for implementation</li> <li>The extent to which your child will participate with other children with and without disabilities in the school environment.</li> <li>Whether your child will participate in state and district-wide tests, with or without accommodations, or have an alternative assessment</li> </ul>

## Acronyms and Terms Used in This Guide

### **Alpha Resource Center:**

**Lifespan Support Services provides services and supports for individuals and families who have children with intellectual and similar developmental disabilities or children who may be at risk of developmental delay and other disabilities. All it takes is a phone call or email to get started.**

### **Early Start:**

In California, infants and toddlers from birth to 36 months may be eligible for early intervention services provided through the Early Start Program if, through documented evaluation and assessment, they meet one of the criteria listed below:

- Have a **25%** developmental delay in either cognitive, communication, social or emotional, adaptive, or physical and motor development **including vision and hearing;** or
- Have established risk conditions of known etiology, with a high probability of resulting in delayed development; or
- Are at high risk of having a substantial developmental disability due to a combination of risk factors.

### **Family Resource Center (FRC):**

**Family Resource Centers are community-based or school-based, flexible, family-focused, and culturally sensitive hubs of support and resources that provide programs and targeted services based on the needs and interests of families.**

### **Family Empowerment Center (FEC):**

**Special Education System Navigation, Support, Training, Mentoring, Access to Public Benefits, Transition and Futures Planning. Contact Meghan Davy for more information [mdavy@alphasb.org](mailto:mdavy@alphasb.org)**

### **Help Me Grow Santa Barbara County:**

**Building coordinated systems of care to ensure early identification of children with developmental delays or who are at risk of disability through partnering, closed loop referrals between child health providers, schools, early care programs, early intervention services with follow-up**

### **Individualized Education Program (IEP)**

Each public-school child who receives special education and related services must have an Individualized Education Program (IEP). Each IEP must be designed for one student and must be a truly individualized

document. The IEP creates an opportunity for teachers, parents, school administrators, related services personnel, students, and others the family may wish to participate, including care providers, friends, and other family members, to work together to improve educational results for children with disabilities. The IEP is the cornerstone of a quality education for each child with a disability. The Individualized Education Plan is the written document describing the *individualized education program*. The IEP meeting is held annually, or when a change in services is desired ***or upon family or service provider request.***

***Reformat- like the above:***

**IFSP** Individualized Family Service Plan  
A plan written to document the delivery of community-based, specialized, interagency services to families with infants or toddlers, birth to age three with developmental disabilities or who may be at risk of developmental delay. The IFSP identifies the Early Start services a child receives. It includes the priorities of the family, family resources, and future goals. It is reviewed every six months ***or upon family or service provider request.***

**IPP** Individualized Program Plan  
A child over the age of 3 who will receive services from Tri-Counties Regional Center will have an Individualized Program Plan (IPP). This is developed by parents, the child, the service coordinator and any other the family consents to participate in the planning process. The IPP describes what the child is able to do at present, goals for the future, ***and the services and supports suggested to help the child achieve their goals.*** The IPP focuses upon goals outside of school and the IEP focuses on academic goals worked on in the school setting. Having a good, functioning IEP is one part of your child's overall IPP. ***Reviewed annually or upon family request.***

***ISP*** ***Individual Service Plan***  
***A written plan created by a public school and private school to provide individual supports to a child found eligible for special education services.***

***SBCEO*** ***The Santa Barbara County Education Office provides service and leadership to 20 public school districts and 10 charter schools. SBCEO offers 200 distinct programs and services in support of nearly 70,000 children throughout Santa Barbara County. Our local partnerships, non-profits, and programs reflect a collective community belief in the value of public education.***

***SBCEO is one of 58 county offices in California. County offices support local school districts by providing services that can be delivered more efficiently and economically at the county level. These include implementing new standards, staff development and training programs; fiscal support for districts including payroll; designing business and personnel systems; and performing many other services to meet the changing needs of local school districts. County offices of education also provide a wide range of instructional programs, including***

**special education, early childhood education, career and technical education, programs for youth at risk, and instruction in juvenile detention facilities.**

**SELPA**

**Special Education Local Plan Area**

SELPA (pronounced sell-puh) stands for Special Education Local Plan Area. SELPAs are made up of school districts and county offices of education within geographic areas. The Santa Barbara County SELPA is made up of all school districts in Santa Barbara County and includes the Santa Barbara County Education Office (SBCEO). These coordinated educational entities have joined together to provide a full range of services to students with disabilities.

**TCRC**

**Tri-Counties Regional Center**

The state of California contracts with Tri-Counties Regional Center (TCRC) to provide supports and services for children and adults with developmental disabilities living in San Luis Obispo, Santa Barbara, and Ventura Counties. These services **can** cover the life span of individuals, from early assessment and intervention for infants and young children, school-age children, transition-age young adults' recreational, employment and residential needs to the residential, service, and medical needs of adults and seniors.

For more information on acronyms, special education jargon, parental rights, or other resources, contact your **S**ervice **C**oordinator or call Alpha **F**amily Resource Center of Santa Barbara. **(See page 13 for contact information.)**

~~(805) 683-2145 or toll free 1-877-414-6227~~

### **Contact Information**

<p><u><b>Alpha Family Empowerment Center of Santa Barbara County:</b></u></p> <p><u><b>Alpha Family Resource Center of Santa Barbara County provides services and supports for individuals and families who have children with intellectual and similar developmental disabilities who may be at risk of developmental delay located throughout Santa Barbara County</b></u></p>	<p><u><b>Website: <a href="https://alphafrc.org/">https://alphafrc.org/</a></b></u></p> <p><u><b>Address:</b></u>  <u><b>520 East Montecito Street, Santa Barbara, California 93103, United States</b></u></p> <p><u><b>805-452-8789</b></u></p> <p><u><b>Hours: Monday through Friday, 9:00am – 5:00pm</b></u></p>
<p><u><b>Santa Barbara County Education Office (SBCEO):</b></u></p> <p><u><b>The Santa Barbara County Education Office provides service and leadership to 20 public school districts and 10 charter schools. SBCEO offers 200 distinct programs and services in support of nearly 70,000 children throughout Santa Barbara County. Our local partnerships, non-profits, and programs reflect a collective community belief in the value of public education.</b></u></p> <p><u><b>SBCEO is one of 58 county offices in California. County offices support local school districts by providing services that can be delivered more efficiently and economically at the county level. These include implementing new standards, staff development and training programs; fiscal support for districts including payroll; designing business and personnel systems; and performing many other services to meet the changing needs of local school districts. County offices of education also provide a</b></u></p>	<p><u><b>Website: <a href="https://www.sbceo.org">https://www.sbceo.org</a></b></u></p> <p><u><b>Mailing Address:</b></u>  <u><b>P.O. Box 6307</b></u>  <u><b>Santa Barbara, CA 93160-6307</b></u></p> <p><u><b>Address:</b></u>  <u><b>4400 Cathedral Oaks Rd.</b></u>  <u><b>Santa Barbara, CA 93160-6307</b></u></p> <p><u><b>(805) 964-4711</b></u></p>

<p><u>wide range of instructional programs, including special education, early childhood education, career and technical education, programs for youth at risk, and instruction in juvenile detention facilities.</u></p>	
<p><u><b>Santa Barbara County Special Education Local Plan Area (SELPA):</b></u></p> <p><u>The Santa Barbara County SELPA (SBCSELPA) and its member districts actively seek out all individuals with disabilities, ages birth through 21, including infants and children enrolled in parentally placed private schools. Special education programs are available to all eligible students with disabilities, ages birth to 21 in Santa Barbara County.</u></p> <p><u>If you are concerned about your child's development or have reason to believe your child needs special education due to a physical, mental, emotional, learning or speech problem, you may contact either the SELPA office or your local school district Special Education Department if you have questions about referring a child for special education services.</u></p>	<p><u><b>Website:</b> <a href="https://sbcselpa.org">https://sbcselpa.org</a></u></p> <p><u><b>Address:</b></u>  <u>5385 Hollister Avenue Building 7, Box 107</u>  <u>Santa Barbara, CA 93111</u></p> <p><u>(805) 683-1424</u></p>
<p><u><b>Tri-Counties Regional Center:</b></u></p> <p><u>Tri-Counties Regional Center is one of twenty-one non-profit regional centers in California providing lifelong services and supports for people with developmental disabilities residing in San Luis Obispo, Santa Barbara and Ventura Counties.</u></p>	<p><u><b>Website:</b> <a href="http://www.tri-counties.org/tcrc3/">www.tri-counties.org/tcrc3/</a></u></p> <p><u><b>Address:</b></u>  <u>520 E. Montecito St</u>  <u>Santa Barbara, CA 93103</u>  <u>(805) 962-7881</u></p> <p><u>1234 Fairway Dr.</u>  <u>Santa Maria, CA 93455</u>  <u>(805) 922-4640</u></p>



### **Santa Barbara County 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 County Education Office	805-964-4711



**Tri-Counties  
Regional Center**

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

## My Child's Early Start Team

Name: Title: Agency: Phone: Notes:	Name: Title: Agency: Phone: Notes:
Name: Title: Agency: Phone: Notes:	Name: Title: Agency: Phone: Notes:
Name: Title: Agency: Phone: Notes:	Name: Title: Agency: Phone: Notes:



Name: Title: Agency: Phone: Notes:	Name: Title: Agency: Phone: Notes:
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## My Child's Preschool Team

Name: Title: Agency: Phone: Notes:	Name: Title: Agency: Phone: Notes:
Name: Title: Agency: Phone: Notes:	Name: Title: Agency: Phone: Notes:
Name: Title: Agency: Phone: Notes:	Name: Title: Agency: Phone: Notes:
Name: Title: Agency: Phone: Notes:	Name: Title: Agency: Phone: Notes:

## Thank you to the following contributing Agencies!

### Alpha Resource Center:

Gina Stabile

Meghan Davy

### Help Me Grow

Patty Moore

### Parents of Special Education:

Dena Davis

Mariana Murillo

Norma Puga

Carrie McKiddie

Others???

### Santa Barbara County Education Office:

Kirsten Escobedo

Armando Uribe

Ashley Johnson

Andy Evans

### Santa Barbara County SELPA

Jennifer Connolly, SBC SELPA

Brian Helt, SBC SELPA

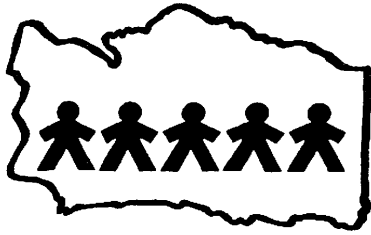
### Tri-Counties Regional Center:

Alisa Eschenbach

Tamika Harris

Eulalia Apolinar

Updated November 2023



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

Date: December 4, 2023

To: SBCSELPA JPA Board

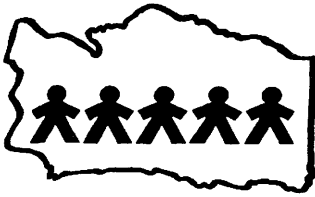
From: Ray Avila, SBCSELPA Executive Director

Re: SBCSELPA “Winter Break” Closure

**BACKGROUND:**

- **The SBCSELPA Office will be closed, from Friday, December 22, 2023, through Monday, January 1, 2024, for “Winter Break.”**
- **The SBCSELPA Office will fully reopen on Tuesday, January 3, 2024.**
- The office will be closed to the public during these dates and there will be no office support staff available. There will be a few individuals that have chosen to work during this time and will physically be in the office. So should an emergency arise, you should be able to contact a SBCSELPA staff member if necessary.
- We will be posting notice of the office closure on the SBCSELPA website, the display board in the front of our physical office and sending out email blasts to the LEAs/Districts to let them know of the closure.
- We hope everyone has a relaxing and nice holiday season and we look forward to seeing everyone next year in 2024!

RA:lm



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

Date: December 4, 2023  
To: SBCSELPA JPA Board  
From: Ray Avila, SBCSELPA Executive Director  
Re: Resignation Notification from Tina Kurrels, SBCSELPA Bilingual WRAP Facilitator

**BACKGROUND:**

- Tina Kurrels notified Ray Avila, SBCSELPA Executive Director, in a letter dated November 20, 2023, that she would be resigning from her position as an SBCSELPA Bilingual WRAP Facilitator, effective January 5, 2024, (**SEE REF: VIII-F.1**).
- SBCSELPA appreciates the service Ms. Kurrels provided during her term with the organization.
- Ms. Kurrels resignation will result in a 1.0 FTE vacancy for a SBCSELPA Facilitator.
- SBCSELPA will evaluate current case load and distribution among the current WRAP staff before deciding how to proceed.

**FISCAL IMPACT:** None at this time.

RA:lm

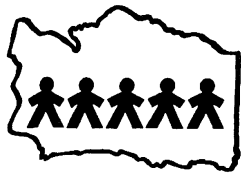
Dear Ray,

I am writing this letter to notify you that I will be resigning my position as Bilingual Wrap Facilitator on January 5<sup>th</sup>, 2024. I also want to tell you and the team how grateful I am for this year of working at SBCSELPA. I have been so impressed with the way that this team works together, and the feeling in the office. I have learned a tremendous amount here, and I could not have asked for a better supervisor. Thank you so much for this Traineeship opportunity.

Warmly,

Tina Kurrels

A handwritten signature in black ink that reads "Tina Kurrels". The signature is written in a cursive style with a large, flowing initial "T".



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

295  
 REF: VIII-G

Date: December 4, 2023

To: SBCSELPA JPA Board

From: Jennifer Connolly, SBCSELPA Coordinator

Re: December and January 2024 Professional Development Calendar

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

**December 2023 Professional Development Events**

<b>Monday, December 4, 2023</b> <b>3:30-5:30</b> Zoom, Recorded Watch Party	Diagnostic Center of S. CA: Part 1: Teaching Students with Moderate/Severe Intellectual Disabilities Presenter: Jill Martinez & Margot Johnson	Free: All Special Education staff working with students with moderate/severe intellectual disabilities.
<b>Tuesday, December 5, 2023</b> <b>3:30-5:30</b> Zoom, Recorded Watch Party	Diagnostic Center of S. CA: Part 2: Teaching Students with Moderate/Severe Intellectual Disabilities Presenter: Jill Martinez Margot Johnson	Free: All Special Education staff working with students with moderate/severe intellectual disabilities.
<b>Wednesday, December 6, 2023</b> <b>2:30-4:00</b> Zoom Recorded	Transition Series Day 3: Writing ITPs (Post-Secondary Goals, Annual Goals)	Free: Event open to staff working with students ages 14-22.
<b>Thursday, December 7, 2023</b> <b>8:30-12:30</b> Zoom, Not Recorded	Day 4: Operating from the Third Side: Supporting Others to Navigate Conflict Presenter: Greg Abell	Free: For all staff, especially Leadership.
<b>Thursday, December 7, 2023</b> <b>2:30-4:00</b> Zoom, Recorded Watch Party	Diagnostic Center of S. CA: Multisensory Math! Advanced Math Skills Presenter: Heather Barakat	Free: For all Staff, Gen. Ed. teachers, Admin., Paraeducators
<b>Tuesday, December 12, 2023,</b> <b>12:00-3:00</b>	UDL/AT Immersion Day 3, Zoom, Not Recorded	Free: Event for all countywide staff.
<b>Wednesday, December 13, 2023</b> <b>3:30-4:30</b> Zoom, Not Recorded	Coaching: Operating from the Third Side: Supporting Others to Navigate Conflict Presenter: Greg Abell	Free: For all staff, especially Leadership.
<b>Thursday, December 14, 2023</b> <b>3:30-4:30</b> Zoom, Recorded Watch Party	Diagnostic Center S. CA: Mindfulness Practice: The Educator's Guide to Help Students Practice Mindfulness Presenter: Mojgan Mostael	Free: For all staff, Mental Health Specialists, Counselors, and staff working with all students

### **January 2024 Professional Development Events**

<b>Thursday, January 11, 2024</b> <b>1:30-3:30</b> Zoom, Recorded	SIRAS Updates, State Testing, Transition to Next Year's Data Presenter: Michael Brown	Event for all staff
<b>Thursday, January 11, 2024</b> <b>8:30-3:00</b> In Person SMB Souza Center	NCPI Presenters: Bethany Schacherer and David Ibsen	Free: Event for all countywide staff.
<b>Thursday, January 18, 2024</b> <b>8:30-3:00</b> In Person SBCSELPA	NCPI Presenters: Jennifer Connolly and Natalie Facio-Leon	Free: Event for all countywide staff.
<b>Tuesday, January 23, 2024</b> <b>4:00-7:00</b> Zoom, Not Recorded	Bridge Authorization for Extensive Support Needs Credential Presenters: Dr. Ray Avila and Jennifer Connolly	Bridge Authorization for Mod/Severe, Extensive Support Needs Credential
<b>Wednesday, January 24, 2024</b> <b>4:00-7:00</b> Zoom, Not Recorded	Bridge Authorization for Early Childhood Special Education Credential Presenters: Armando Uribe and Jennifer Connolly	Bridge Authorization for Early Childhood Special Education Credential
<b>Thursday, January 25, 2024</b> <b>4:00-7:00</b> Zoom, Not Recorded	Bridge Authorization for Mild/Mod Support Needs Credential Presenters: Dr. Ray Avila and Jennifer Connolly	Bridge Authorization for Mild/Mod Support Needs and Resource Credential
<b>Tuesday, January 30, 2024</b> <b>12:00-3:00</b>	Digital Tools Day 1, Zoom, Not Recorded	Free: Event for all countywide staff.



**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

REF: VIII-G.1



# Santa Barbara County SELPA Fall 2023 Professional Development Events

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**New Events Added Monthly**

# Santa Barbara County SELPA

## Fall 2023

### Professional Development Events

The Santa Barbara County Special Education Local Plan Area (SBCSELPA) 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 (SBCSELPA) 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.
- Coordination of 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](http://www.sbcselpa.org) for Santa Barbara County SELPA.

# Santa Barbara County SELPA

## Fall 2023

### Professional Development Events

#### 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 SBCSELPA and its member districts do not discriminate based on 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 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.

**Santa Barbara County SELPA  
Fall 2023  
Professional Development Events**

**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
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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

**New Events Added Monthly**

# **Santa Barbara County SELPA**

## **Fall 2023**

### **Professional Development Events**

#### **About SBCSELPA Professional Development Offerings**

Professional Development Offerings are created from feedback of countywide staff input from a yearly survey, CDE targets in Special Education Plans (SEPs), and direct input from countywide Special Education Director and Local Education Agency (LEA) District 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 overall Santa Barbara 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.**

Districts: contact Jennifer Connolly at [jconnolly@sbcsepa.org](mailto:jconnolly@sbcsepa.org) to request the Professional Development topic.

- Propose dates/time, and location of training.
- Requests must be in writing via email, received a month in advance.

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.

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.

The Professional Development event to be added to the SBCSELPA Online Management System, OMS calendar for tracking purposes.

**Attendance:** Participants of the 'Mini' LEA requested Professional Development events do not have to register on OMS.

For Nonviolent Crisis Prevention Intervention (NCPI) contact Alison [alindsey@sbcsepa.org](mailto:alindsey@sbcsepa.org)

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.

Presenter (s) subject to change due to unforeseen emergencies.

District venues subject to change due to number of participants for Professional Development.

If more than one district requests the same topic on the same day, the event may include more than one district.

##### **Large Professional Development Offerings for North, Mid, South County**

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

**New Events Added Monthly**



**Santa Barbara County SELPA  
Fall 2023  
Professional Development Events**

**Network Meetings**  
**All Santa Barbara County**

Network	Dates
Adapted P.E. Network	Thursday, September 21, 2:30-3:00 Thursday, November 30, 2:30-3:00 Thursday, February 29, 2:30-3:00 Thursday, April 18, 3:00-3:30  Zoom link: <a href="https://us06web.zoom.us/j/89977662958?pwd=bVZBQzRqTE0xODhab3Z5K2h0MGM0Zz09">https://us06web.zoom.us/j/89977662958?pwd=bVZBQzRqTE0xODhab3Z5K2h0MGM0Zz09</a>
ADR Cadre	Thursday, August 31, 8:30-9:30 at SELPA Thursday, November 30, 8:30-9:30 Thursday, April 18, 8:30-9:30  Zoom link: <a href="https://us06web.zoom.us/j/81729152052?pwd=SnJXRzdBeWwyVDZNRmpkZ2hKcXg2QT09">https://us06web.zoom.us/j/81729152052?pwd=SnJXRzdBeWwyVDZNRmpkZ2hKcXg2QT09</a>
CALPADS/MIS Network	Friday, August 4, 9:00-12:00 Friday, October 13, 9:00-10:00 Friday, December 1, 10:00-11:00 Friday, February 2, 9:00-10:00  Zoom link: <a href="https://us06web.zoom.us/j/82386419909?pwd=bjFWUXVhUW9MY1R2dUs5dlRpeWhHZz09">https://us06web.zoom.us/j/82386419909?pwd=bjFWUXVhUW9MY1R2dUs5dlRpeWhHZz09</a>
Interpreter/Translator Network	Wednesday, October 27, 9:00-10:00 Wednesday, February 9, 900-1000 Wednesday, April 11, 9:00-10:00  Zoom link: <a href="https://us06web.zoom.us/j/82579190821?pwd=UINMZ2dhZUJSRnpkMHNxdnR1QmdyUT09">https://us06web.zoom.us/j/82579190821?pwd=UINMZ2dhZUJSRnpkMHNxdnR1QmdyUT09</a>

**New Events Added Monthly**

# Santa Barbara County SELPA

## Fall 2023

### Professional Development Events

Medically Fragile Teacher Network	<p>Wednesday, September 27, 3:30-4:15          Wednesday, November 29, 3:30-4:15          Wednesday, February 7, 3:30-4:15          Wednesday, April 17, 3:30-4:15</p> <p>Hosted by SLO and SBC SELPA          Zoom link:  <a href="https://us06web.zoom.us/j/86311929848?pwd=bmlxN214QlY3TW5jK3lJRUFMNUs5Zz09">https://us06web.zoom.us/j/86311929848?pwd=bmlxN214QlY3TW5jK3lJRUFMNUs5Zz09</a></p>
Occupational Therapist Network	<p>Tuesday, September 21, 3:00-3:30          Tuesday, November 16, 3:00-3:30          Tuesday, January 18, 3:00-3:30          Tuesday, April 25, 3:00-3:30</p> <p>Zoom link:  <a href="https://us06web.zoom.us/j/85118898281?pwd=bkRWYzRSZEhuTlptdGRKNFhWTjlBQT09">https://us06web.zoom.us/j/85118898281?pwd=bkRWYzRSZEhuTlptdGRKNFhWTjlBQT09</a></p>
Preschool Staff Network	<p>Thursday, September 14, 3:15-4:00          Thursday, November 9, 3:15-4:00          Thursday, January 11, 3:30-4:15          Thursday, March 14, 3:30-4:15          Thursday, May 9, 3:30-4:15</p> <p>Zoom link:  <a href="https://us06web.zoom.us/j/89473040888?pwd=cU51aE9paGVYdnZDbjRlUTY2QWVmZz09">https://us06web.zoom.us/j/89473040888?pwd=cU51aE9paGVYdnZDbjRlUTY2QWVmZz09</a></p>
Nurses Network	<p>Thursday, August 31, 2:00-3:00          Tuesday, April 30, 8:30-12:00 (Symposium)</p> <p>Zoom link:  <a href="https://us06web.zoom.us/j/84236211799?pwd=TXJFcUs2cG9mNXBnSU5p5TGkzNU1RUT09">https://us06web.zoom.us/j/84236211799?pwd=TXJFcUs2cG9mNXBnSU5p5TGkzNU1RUT09</a></p>
School Psychologist Network	<p>Tuesday, September 12, 8:30-9:00          Tuesday, October 10, 8:30-9:00          Tuesday, February 13, 8:30-9:00          Tuesday, March 12, 8:30-9:00          Tuesday, April 16, 8:30-9:00</p> <p>Zoom link:</p>

**New Events Added Monthly**



**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

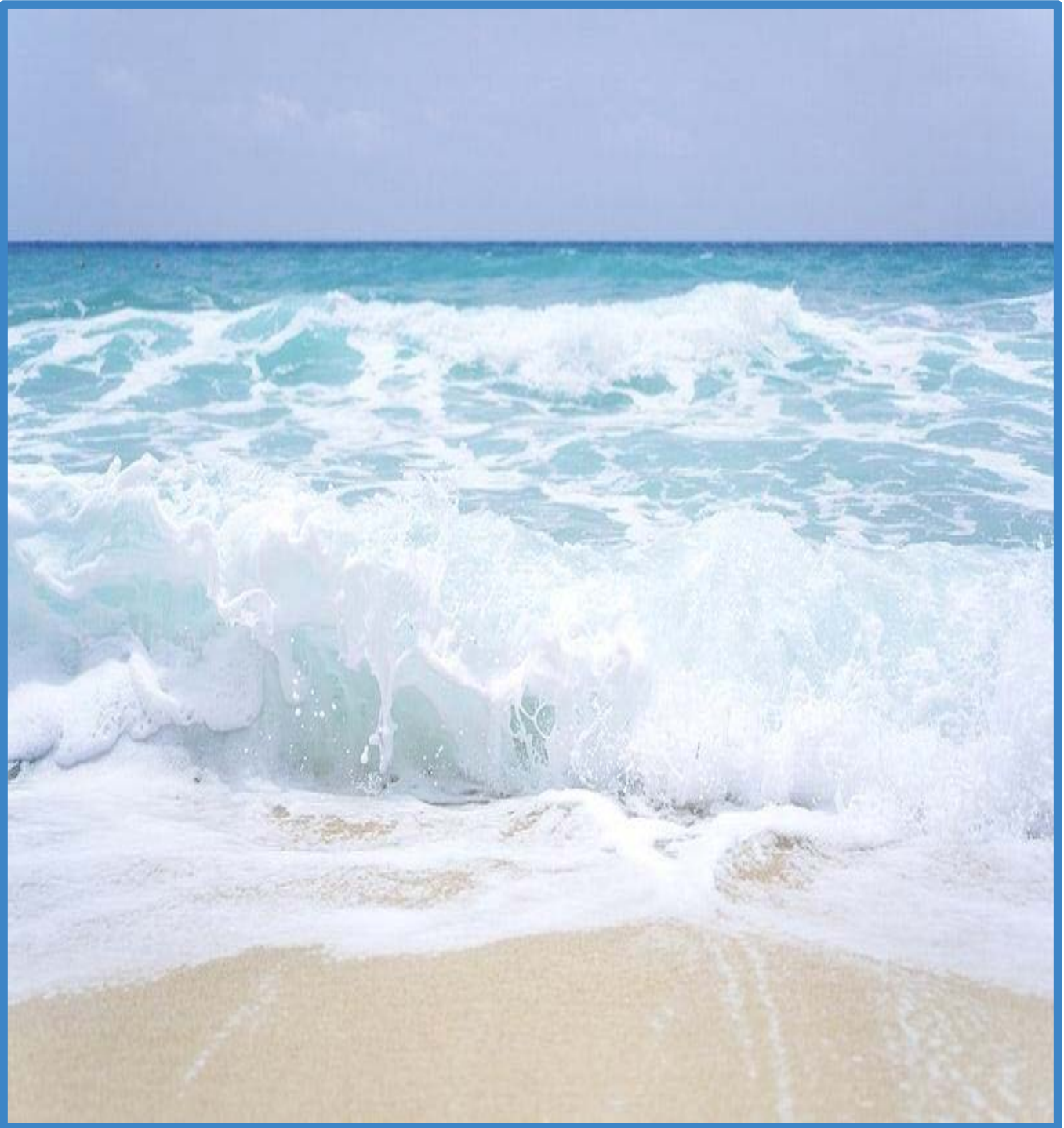
	<a href="https://us06web.zoom.us/j/82939772286?pwd=amwzTWRxNEdmYjNQakxYNmZoL0pPQT09">https://us06web.zoom.us/j/82939772286?pwd=amwzTWRxNEdmYjNQakxYNmZoL0pPQT09</a>
SIRAS Office Hours	<p>Monday, August 28, 3:30-4:30  Monday, September 18, 3:30-4:30  Monday, October 30, 3:30-4:30  Monday, November 27, 3:30-4:40</p> <p>Zoom link:  <a href="https://us06web.zoom.us/j/89846079834?pwd=RWJ2NXFaWFdtR3BXeStSTFAvWjB3QT09">https://us06web.zoom.us/j/89846079834?pwd=RWJ2NXFaWFdtR3BXeStSTFAvWjB3QT09</a></p>
SIRAS Forms Committee	<p>Friday, August 25, 9:00-10:00  Friday, December 1, 9:00-10:00  Friday, March 1, 9:00-10:00</p> <p>Zoom link:  <a href="https://us06web.zoom.us/j/89845499439?pwd=MjkxcFptaXpJTmV4cXQ2aXBhNktNZz09">https://us06web.zoom.us/j/89845499439?pwd=MjkxcFptaXpJTmV4cXQ2aXBhNktNZz09</a></p>
Speech and Language Network	<p>Thursday, September 14, 2:00-2:30  Thursday, November 16, 2:00-2:30  Thursday, February 8, 2:00-2:30  Thursday, April 18, 2:00-2:30</p> <p>Zoom link:  <a href="https://us06web.zoom.us/j/82622050171?pwd=dURQSjVuNzZpdkFiTkVITGlla2tJUT09">https://us06web.zoom.us/j/82622050171?pwd=dURQSjVuNzZpdkFiTkVITGlla2tJUT09</a></p>
Specific Learning Disability Manual Team	<p>Wednesday, September 13, 8:30-9:30  Wednesday, October 11, 8:30-9:30  Wednesday, December 6, 8:30-9:30  Wednesday, February 7, 8:30-9:30  Wednesday, March 6, 8:30-9:30  Wednesday, April 17, 8:30-9:30</p> <p>Zoom link:  <a href="https://us06web.zoom.us/j/87667695116?pwd=MzJuL2NIeVBQckJnK2RSdTZxS041dz09">https://us06web.zoom.us/j/87667695116?pwd=MzJuL2NIeVBQckJnK2RSdTZxS041dz09</a></p>
Special Education Leadership Network	<p>Monday, August 28, 12:00-2:00  Monday, September 18, 9:00-10:00  Monday, October 30, 9:00-10:00  Monday, November 27, 9:00-10:00  Monday, January 29, 8:30-10:30</p>

**New Events Added Monthly**

**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

	<p>Monday, March 4, 9:00-10:00  Monday, April 29, 8:30-10:30  Monday, May 20, 9:00-10:00</p> <p>Zoom link:  <a href="https://us06web.zoom.us/j/86876212937?pwd=QkVWbFNDWGE5NHFtNE0wMXhZVV A5Zz09">https://us06web.zoom.us/j/86876212937?pwd=QkVWbFNDWGE5NHFtNE0wMXhZVV A5Zz09</a></p>
Transition Network Team	<p>Tuesday, September 26, 2:00-3:00  Tuesday, October 31, 2:00-3:00  Tuesday, November 14, 2:00-3:00  Tuesday, February 6, 2:00-3:00  Tuesday, March 19, 2:00-3:00</p> <p>Zoom link:  <a href="https://us06web.zoom.us/j/87475366693?pwd=RS9FanBnMGVmQ051ZHU4QzJuNE9h UT09">https://us06web.zoom.us/j/87475366693?pwd=RS9FanBnMGVmQ051ZHU4QzJuNE9h UT09</a></p>
Vision Network	<p>Thursday, September 7, 1:30-3:30  SBCSELPA Conference Room- In Person  Thursday, October 5, 1:30-3:30  SBCEO North- In Person  Thursday, November 2, 1:30-3:30  TBD</p>

**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**  
**July and August**



**New Events Added Monthly**

**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**  
**July/August**

<https://sbcselpa.k12oms.org>

<u><b>Date/Time/Location</b></u>	<u><b>Name of Event and Presenter</b></u>	<u><b>Cost/Additional Details</b></u>
<b>Thursday, July 6, 2023</b> <b>10:00-11:00</b> Zoom Not Recorded	Consulting in Schools Presenter: Dr. Rosy Bucio	Free: Event scheduled for NPS/NPA Behavior Certification. All LEAS are welcome to attend.
<b>Wednesday, July 26, 2023</b> <b>10:00-11:00</b> Zoom Not Recorded	A New Lens on Behavior Presenter: Dr. Rosy Bucio	Free: Event scheduled for NPS/NPA Behavior Certification. All LEAS are welcome to attend.
<b>August</b>		
<b>Tuesday, August 1, 2023</b> <b>12:30-3:30 In Person</b> Orcutt USD and SMJUHSD Righetti H.S. Cafeteria	Paraprofessional/ Instructional Assistant Training: Presenter: Jennifer Connolly	Free: Event for Orcutt and SMJUHSD staff only.
<b>Wednesday, August 2, 2023 In Person</b> <b>12:30-3:30 In Person</b> Orcutt USD and SMJUHSD Righetti H.S. Cafeteria	Paraprofessional/ Instructional Assistant Training: Presenter: Rosy Bucio	Free: Event for Orcutt and SMJUHSD staff only.
<b>Wednesday, August 2, 2023 In person</b>	GROW Training Presenter: Alison Lindsey	Free: Event for SMJUHSD GROW Program staff only.
<b>Thursday, August 3, 2023</b> <b>12:30-3:30 In Person</b> Orcutt USD and SMJUHSD Pioneer Valley H.S. Library	Paraprofessional/ Instructional Assistant Training: Presenter: Alison Lindsey	Free: Event for Orcutt and SMJUHSD staff only.

**New Events Added Monthly**

**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

<b>Thursday, August 3, 2023</b> <b>9:00-12:00 In Person and Zoom</b> SBCSELPA Conference Room Santa Barbara Recorded	Overview of CALPADS Reporting by CDE Presenter: Brandi Jauregui and Alex Manriquez	Free: Event for Administrators and Leadership in Special Education
<b>Friday, August 4, 2023</b> In Person	GROW Training Presenter: Alison Lindsey	Free: Event for LUSD GROW Program staff only.
<b>Friday, August 4, 2023</b> <b>9:00-12:00 In Person and Zoom</b> SBCSELPA Conference Room Santa Barbara Recorded	CALPADS/ MIS Training Updates by CDE Presenter: Brandi Jauregui and Alex Manriquez	Free: Event for Administrators and Leadership in Special Education
<b>Friday, August 4, 2023</b> <b>8:30-3:30 In Person</b> Orcutt USD and SMJUHSD Righetti H.S. Cafeteria	Nonviolent Crisis Prevention Intervention (NCPI) Presenters: Natalie Facio-Leon, Phil Pandac, Jody Dowell	Free: Event for Orcutt and SMJUHSD staff only.
<b>Monday, August 7, 2023 In Person</b> <b>1:30-3:30</b> Orcutt USD	SIRAS Beginners Training for new staff Presenter: Jennifer Connolly	Free: Event for Orcutt staff only.
<b>Tuesday, August 8, 2023</b> In Person	GROW Training Presenter: Alison Lindsey	Free: Event for Santa Ynez Valley Consortium GROW Program staff only.
<b>Tuesday, August 8-9, 2023</b> <b>8:30-3:30 In Person</b> <b>Location: TBD</b>	New Trainer of Trainers: Nonviolent Crisis Prevention Intervention (NCPI)	Free: Event closed to the public. Trainers approved by SELPA and Districts.

**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

<b>Wednesday, August 9, 2023 9:00-11:00</b> Zoom Recorded	Beginners MIS Clerk Training and SIRAS Updates for MIS Clerks Presenter: Brian Marcontell and Michael Brown	Free: Event for all Clerks and Admin. working with data in SIRAS.
<b>Thursday, August 10, 2023 8:30-3:30 In Person</b> Location: TBD	Trainer of Trainers: Nonviolent Crisis Prevention Intervention (NCPI)	Event closed to the public. Trainers approved by SELPA and Districts.
<b>Thursday, August 24, 2023 9:00-10:00</b> Zoom Not Recorded	Supporting Students in Schools Presenter: Rosy Bucio	Free: Event scheduled for NPS/NPA Behavior Certification. All LEAS are welcome to attend.
<b>Thursday, August 24, 2023 3:00-5:00</b> Zoom Recorded	SIRAS Beginners Training Presenter: Michael Brown	Free: Event for all staff new to SIRAS. Learn to create an IEP in SIRAS.
<b>Monday, August 28, 2023 3:00-4:00</b> Zoom Not Recorded	Providing Students with Feedback Presenter: Rosy Bucio	Free: Event scheduled for NPS/NPA Behavior Certification. All LEAS are welcome to attend.
<b>Monday, August 28, 2023 3:30-4:30</b> Zoom Not Recorded	SIRAS Office Hours Presenter: Jennifer Connolly	Free: Drop in with SIRAS Questions and Support Needs.
<b>Thursday, August 31, 2023 2:00-3:00</b> Zoom Recorded	Seizure Action Plans and Headache Remediation Presenter: Dr. Genevieve Cruz	Free: Event for SB County Nurses and all staff



**Santa Barbara County SELPA  
Fall 2023  
Professional Development Events**

**September**



**New Events Added Monthly**

**Santa Barbara County SELPA  
Fall 2023  
Professional Development Events**

**September**

<https://sbcselfpa.k12oms.org>

<b><u>Date/Time/Location</u></b>	<b><u>Name of Event and Presenter</u></b>	<b><u>Cost/Additional Details</u></b>
<b>Tuesday, September 5, 2023</b> <b>12:00-1:00</b> Zoom Not Recorded	Consulting in Schools Presenter: Dr. Rosy Bucio	Event scheduled for NPS/NPA Behavior Certification. All LEAS are welcome to attend.
<b>Wednesday, September 6, 2023</b> <b>2:30-4:30</b> Zoom, Recorded	SIRAS Beginners Training Presenter: Michael Brown	Event for all staff new to SIRAS. Learn to create an IEP in SIRAS.
<b>Tuesday, September 12, 2023</b> <b>12:30-3:30</b> In Person at SBCSELPA and Zoom	Manifestation Determination Presenter: Melissa Hatch	Free: Event for all staff.
<b>Tuesday, September 12, 2023</b> <b>4:00-7:00</b> In Person at SBCSELPA Dinner Provided	Bridge Authorization for Extensive Support Needs Credential Presenters: Dr. Ray Avila and Jennifer Connolly	Free: Event for staff needing to add the Bridge Authorization for staff holding a Mod/Severe (Extensive Support Needs) Credential.
<b>Wednesday, September 13, 2023</b> <b>12:00-3:00</b> Zoom, Not Recorded	Tier 1, Day 1 of 4: Placer County SELPA AAC Training	Free: Event for all SLPs.
<b>Wednesday, September</b>	Bridge Authorization for	Free: Event for staff

**New Events Added Monthly**



**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

<b>13, 2023</b> <b>4:00-7:00</b> In Person at SBCSELPA Dinner Provided	Early Childhood Special Education Credential Presenters: Armando Uribe and Jennifer Connolly	needing to add the Bridge Authorization for staff holding Early Childhood Special Education Credential.
<b>Thursday, September 14, 2023</b> <b>4:00-7:00</b> In Person at SBCSELPA Dinner Provided	Bridge Authorization for Mild Moderate Support Needs Credential Presenters: Dr. Ray Avila and Jennifer Connolly	Free: Event for staff needing to add the Bridge Authorization for staff holding a Mild Moderate or Resource Credential.
<b>Monday, September 18, 2023</b> <b>10:00-11:00</b> Zoom Not Recorded	A New Lens on Behavior Presenter: Dr. Rosy Bucio	Event scheduled for NPS/NPA Behavior Certification. All LEAS are welcome to attend.
<b>Monday, September 18, 2023</b> <b>3:30-4:30</b> Zoom, Not Recorded	SIRAS Office Hours Drop In with Jennifer Connolly	Free: Event for all staff.
<b>Tuesday, September 19, 2023</b> <b>2:30-4:30</b> Zoom, Recorded	SIRAS Updates with Service Logs Presenter: Brian Marcontell	Event for all staff. Learn how to create individual and group service logs.
<b>Wednesday, September 20, 4:00-7:00 In person Dos Pueblos High School</b>	South County Transition Fair	Event for parents, students and staff ages Junior HS to HS.
<b>Friday, September 22, 2023</b> <b>8:30-11:30</b> In Person- SBCSELPA  <b>Two locations:</b>  <b>Friday, September 22, 2023</b> <b>1:00-3:30</b> In Person- SMB Souza Center	Day 1 of 4: Operating from the Third Side: Supporting Others to Navigate Conflict Presenter: Greg Abell	Free: For all staff, especially Leadership.

**New Events Added Monthly**

**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

<b>Tuesday, September 26, 2023</b> <b>3:15-4:30</b> <b>Zoom</b> <b>Watch Party</b>	Dyslexia and the Learning Brain Presenter: Maria Luisa Gorno Tempini (SCOE CA Dyslexia Initiative)	Free: Event for all countywide staff.
<b>Wednesday, September 27, 2023</b> <b>12:00-3:00</b> Zoom, Not Recorded	Tier 1, Day 2 of 4: Placer County SELPA AAC Training	Free: Event for all SLPs.
<b>Thursday, September 28, 2023</b> 3:30-4:30 Virtual, Not Recorded.	Coaching: Operating from the Third Side: Supporting Others to Navigate Conflict	Free: For all staff, especially Leadership.

**Santa Barbara County SELPA  
Fall 2023  
Professional Development Events**

**October**



**Santa Barbara County SELPA  
Fall 2023  
Professional Development Events**

**October**

<https://sbcselfpa.k12oms.org>

<b><u>Date/Time/Location</u></b>	<b><u>Name of Event and Presenter</u></b>	<b><u>Cost/Additional Details</u></b>
<b>Tuesday, October 3, 2023</b> <b>3:00-4:00</b> Zoom Not Recorded	Supporting Students in Schools Presenter: Dr. Rosy Bucio	Free: Event scheduled for NPS/NPA Behavior Certification. All LEAS are welcome to attend.
<b>Tuesday, October 4, 2023 3:15-4:30</b> Zoom Recorded event-Watch Party	Building Systems that Support Struggling Readers and Students with Dyslexia Presenter: Sharon Vaughn, U of Texas (SCOE, CA Dyslexia Initiative)	Free: Event for all countywide staff.
<b>Wednesday, October 4, 2023 4:00-7:00 in person Pioneer Valley HS Cafeteria</b>	North County Transition Fair	Event for parents, students and staff ages Junior HS to HS.
<b>Wednesday, October 4, 2023</b> <b>8:30-3:00</b> In person SBCSELPA and Zoom option	Patterns of Strengths and Weaknesses Presenter: Jenny Ponzuric	Free: Event for all countywide staff.
<b>Thursday, October 5, 2023</b> <b>8:30-3:00</b> In Person SMB Souza Center	NCPI Presenters: Alison Lindsey and Rosy Bucio	Free: Event for all countywide staff.

**New Events Added Monthly**

**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

<b>Monday, October 9, 2023</b> <b>8:30-10:30</b> Zoom Recorded Watch Party	Diagnostic Center of S. CA: Keeping the Day Sane: Mental Health 101 for Paraeducators Presenter: Tim Halphide	Free: Paraeducators, all staff, ERMHS staff, Behaviorists, IEP team members.
<b>Tuesday, October 10, 2023</b> <b>3:15-4:30</b> Zoom Recorded Watch Party	Identifying Students At Risk for Reading Difficulty Presenter: Dr. Jack Fletcher (SCOE CA Dyslexia Initiative)	Free: Event open to all staff.
<b>Wednesday, October 11, 2023</b> <b>12:00-3:00</b> Zoom	Tier 1, Day 3 of 4: Placer County SELPA AAC Training	Free: Event open to all SLPs.
<b>Thursday, October 12, 2023</b> <b>2:30-4:00</b> Zoom, Recorded	Transition Series Day 1: The Spirit of Transition and why we plan for Life after High School Presenters: TNT	Free: Event open to staff working with students ages 14-22.
<b>Tuesday, October 17, 2023</b> <b>4:00-7:00</b> In Person at Lompoc USD District Office Dinner Provided	Bridge Authorization for Extensive Support Needs Credential Presenters: Dr. Ray Avila and Jennifer Connolly	Bridge Authorization for Mod/Severe (Extensive Support Needs) Credential
<b>Wednesday, October 18, 2023</b> In Person at Lompoc USD District Office Dinner Provided	Bridge Authorization for Early Childhood Special Education Credential Presenters: Armando Uribe and Jennifer Connolly	Bridge Authorization for Early Childhood Special Education Credential
<b>Thursday, October 19, 2023</b> <b>8:30-3:00</b> In Person SBCSELPA	NCPI Presenters: Jennifer Connolly and Chris Osborne	Free: Event for all countywide staff.
<b>Thursday, October 19, 2023</b> <b>4:00-7:00</b> In Person at Lompoc USD	Bridge Authorization for Mild/Moderate Support Needs Credential Presenters: Dr. Ray Avila	Bridge Authorization for Mild/Moderate Support Needs or Resource Credential

**New Events Added Monthly**

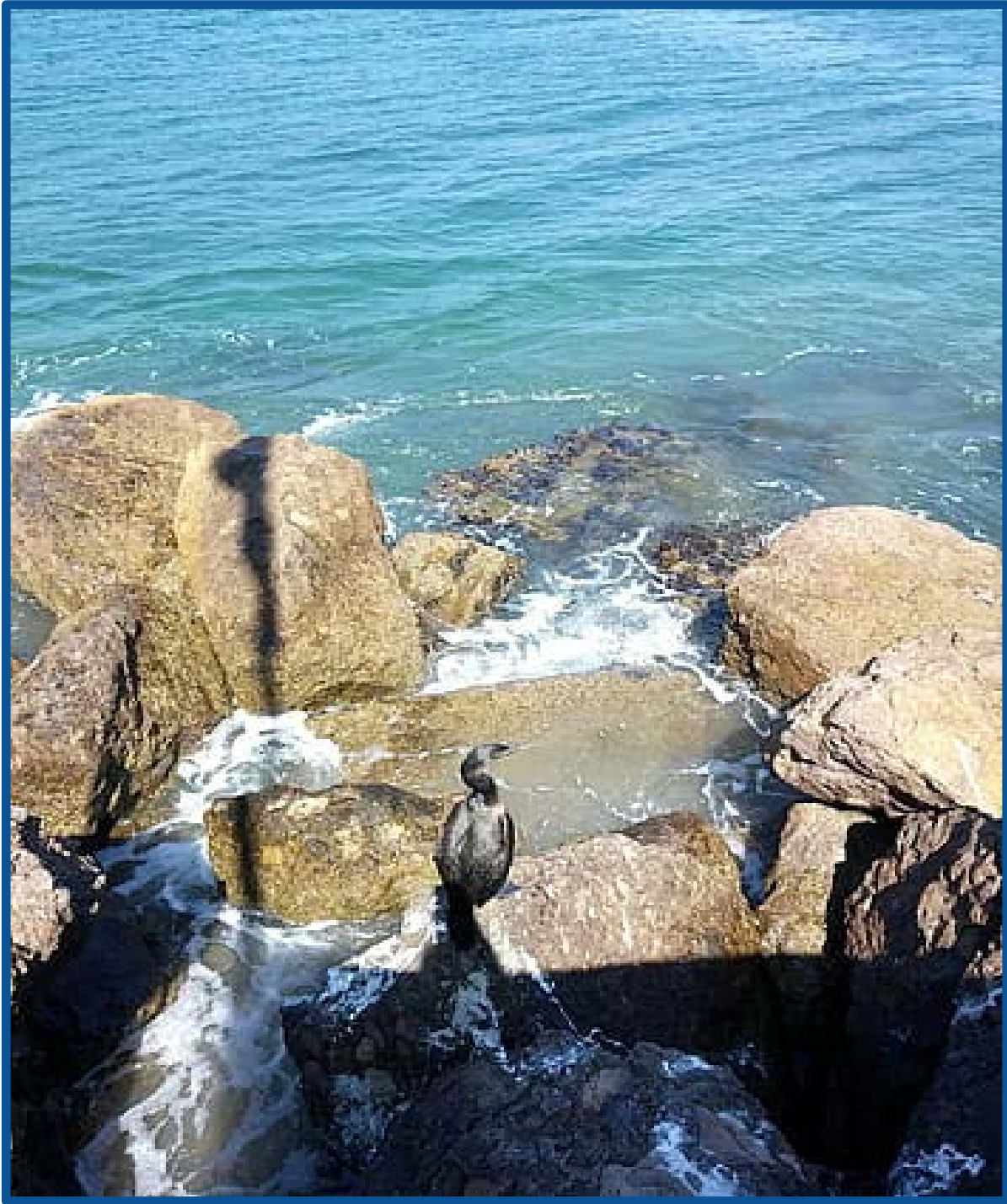
**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

District Office Dinner Provided	and Jennifer Connolly	
<b>Tuesday, October 24, 2023</b> <b>3:15-4:30</b> Zoom Watch Party	Preventing Reading Difficulties Through Early Intervention Presenter: Hugh Catts (SCOE CA Dyslexia Initiative)	Free: Event open to all staff.
<b>Tuesday, October 24, 2023</b> 9:00-2:00 In person at SBCEO Auditorium	Inclusion Network Presenter: Kevin Schaefer	Free: Event open to all staff.
<b>Wednesday, October 25, 2023</b> <b>2:00-4:00</b> Zoom	Dyslexia Training Institute Presenter: Kelli Sandman-Hurley	Free: Event open to all staff.
<b>Thursday, October 26, 2023 8:30-12:30</b> Zoom	Day 2: Operating from the Third Side: Supporting Others to Navigate Conflict Presenter: Greg Abell	Free: For all staff, especially Leadership.
<b>Friday, October 27, 2023</b> <b>1:00-3:00</b> Zoom	Dyslexia Training Institute Presenter: Kelli Sandman-Hurley	Free: Event open to all staff.
<b>Monday, October 30, 2023</b> <b>3:30-4:40</b> Zoom	SIRAS Office Hours with Jennifer Connolly drop in.	Free: For all staff.
<b>Tuesday, October 31, 2023</b> <b>3:15-4:30</b> Zoom Watch Party	Structured Literacy Reading Instruction for English Learners Presenter: Elsa Cardenas-Hagan (SCOE CA Dyslexia Initiative)	Free: Event for all countywide staff.

**Santa Barbara County SELPA  
Fall 2023  
Professional Development Events**

**November**

**Santa Barbara County SELPA  
Fall 2023  
Professional Development Events**



**November**  
**<https://sbcselpa.k12oms.org>**

**New Events Added Monthly**



**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

<b><u>Date/Time/Location</u></b>	<b><u>Name of Event and Presenter</u></b>	<b><u>Cost/Additional Details</u></b>
<b>Wednesday, November 1, 2023</b> <b>3:30-5:00</b> Zoom Recorded Watch Party	Diagnostic Center of S. CA: Reading Between the Lines Presenter: Andrea Abrishami	Free: Educators working with students with reading difficulties ASHA Hours for SLPs
<b>Thursday, November 2, 2023</b> <b>3:30-4:30</b> Virtual, Not Recorded.	Coaching: Operating from the Third Side: Supporting Others to Navigate Conflict Presenter: Greg Abell	Free: For all staff, especially Leadership.
<b>Thursday, November 2, 2023</b> <b>8:30-3:00</b> In Person SMB Souza Center	NCPI Presenters: Sarah Gunn and Phil Pandac	Free: Event for all countywide staff.
<b>Monday, November 6, 2023</b> <b>4:00-7:00</b> In Person Santa Maria Joint UHSD Board Room Dinner Provided	Bridge Authorization for Extensive Support Needs Credential Presenters: Dr. Ray Avila and Jennifer Connolly	Bridge Authorization for Moderate/Severe, Extensive Support Needs Credential
<b>Tuesday, November 7, 2023</b> <b>4:00-7:00</b> In Person Santa Maria Joint UHSD Board Room Dinner Provided	Bridge Authorization for Mild/Moderate Support Needs Credential Presenters: Dr. Ray Avila and Jennifer Connolly	Bridge Authorization for Mild/Moderate Support Needs and Resource Credential
<b>Tuesday, November 7, 2023</b> <b>12:00-3:00</b> Location TBD	UDL/AT Immersion Day 1	Free: Event for all countrywide staff.
<b>Wednesday, November 8, 2023</b> <b>8:30-10:30</b>	Hot Topics in Special Education Presenter: Jan Tomskey	Free: Event for all countywide staff.

**New Events Added Monthly**

**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

Zoom	Fagen, Friedman, & Fulfroft	
<b>Wednesday, November 8, 2023</b> <b>2:00-4:00</b> Zoom	Patterns of Strengths and Weaknesses Coaching Presenter: Jenny Ponzuric	Free: Event for all countywide staff.
<b>Wednesday, November 8, 2023</b> <b>4:00-7:00</b> In Person Santa Maria Joint UHSD Board Room Dinner Provided	Bridge Authorization for Early Childhood Special Education Credential Presenters: Armando Uribe and Jennifer Connolly	Bridge Authorization for Early Childhood Special Education Credential
<b>Wednesday, November 15, 2023</b> <b>8:30-12:30</b> Zoom, Not Recorded	Day 3: Operating from the Third Side: Supporting Others to Navigate Conflict Presenter: Greg Abell	Free: For all staff, especially Leadership.
<b>Wednesday, November 15, 2023</b> <b>2:30-4:00</b> Zoom, Recorded	Transition Series Day 2: Transition Assessments Presenters: TNT	Free: Event open to staff working with students ages 14-22.
<b>Thursday, November 16, 2023</b> <b>8:30-3:00</b> In Person SBCSELPA	NCPI Presenters: Rosy Bucio and Jermaine Powell	Free: Event for all countywide staff.
<b>Monday, November 27, 2023</b> <b>3:30-4:30</b> Zoom	SIRAS Office Hours Presenter: Jennifer Connolly	Free: Event for all countywide staff.
<b>Tuesday, November 28, 2023</b> <b>12:00-3:00</b> Virtual Not Recorded	UDL/AT Immersion Day 2	Free: Event for all countywide staff.
<b>Tuesday, November 28, 2023</b> <b>1:00-3:00</b>	Assessment and Identification of students with Emotional	Free: For all staff and leadership

**New Events Added Monthly**

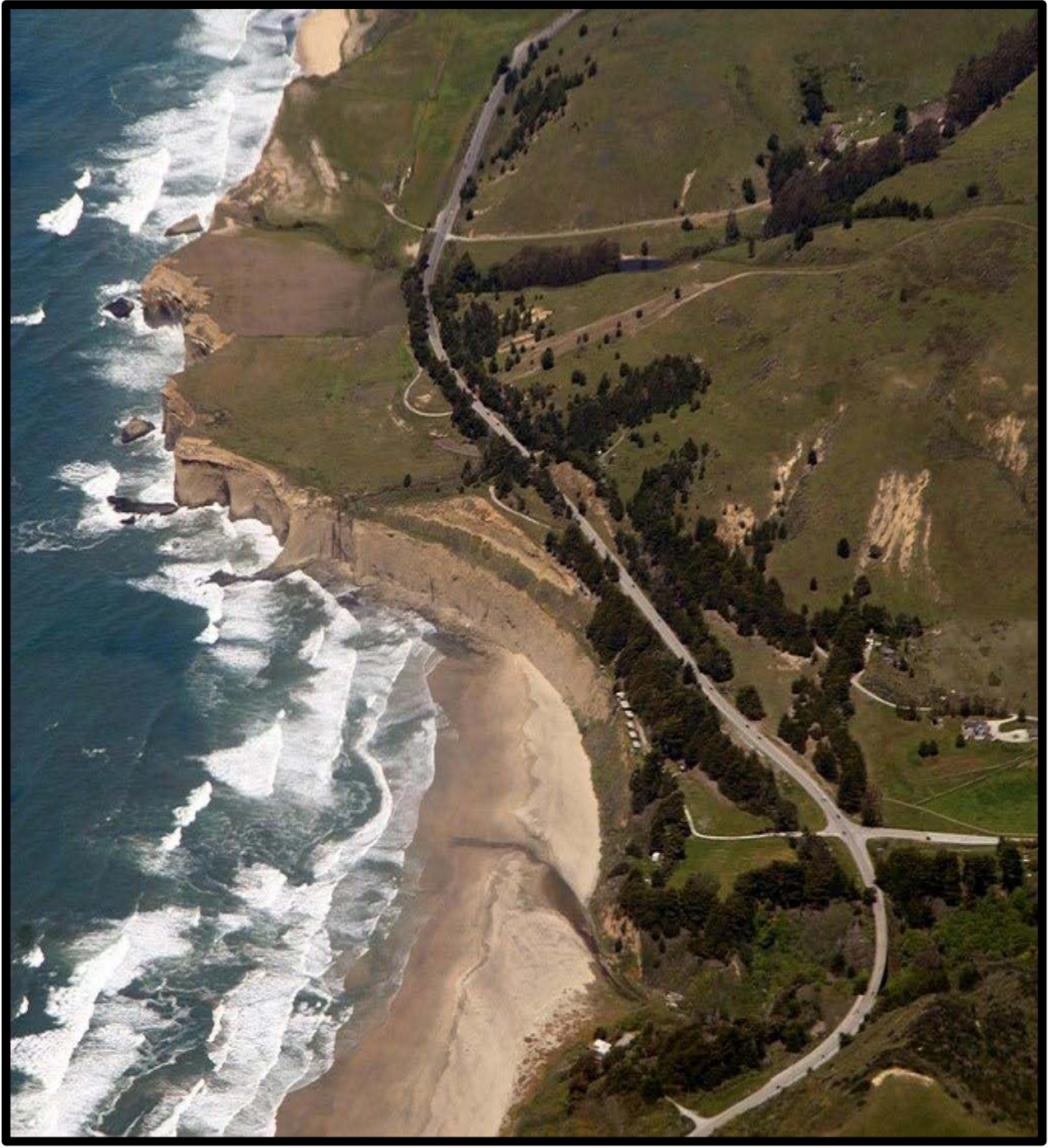
**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

<b>SMB Souza Center</b>	Disturbance Presenter: Melissa Hatch	
<b>Tuesday, November 28, 2023 3:30-4:30 Virtual</b>	Coaching: Operating from the Third Side: Supporting Others to Navigate Conflict Presenter: Greg Abell	Free: For all staff, especially Leadership.

**December**

**New Events Added Monthly**

**Santa Barbara County SELPA  
Fall 2023  
Professional Development Events**



**New Events Added Monthly**

**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**  
**December**  
<https://sbcselpa.k12oms.org>

<b><u>Date/Time/Location</u></b>	<b><u>Name of Event and Presenter</u></b>	<b><u>Cost/Additional Details</u></b>
<b>Monday, December 4, 2023</b> <b>3:30-5:30</b> Zoom Recorded Watch Party	Diagnostic Center of S. CA: Part 1: Teaching Students with Moderate/Severe Intellectual Disabilities Presenter: Jill Martinez Margot Johnson	Free: All Special Education staff working with students with moderate/severe intellectual disabilities.
<b>Tuesday, December 5, 2023</b> <b>3:30-5:30</b> Zoom Recorded Watch Party	Diagnostic Center of S. CA: Part 2: Teaching Students with Moderate/Severe Intellectual Disabilities Presenter: Jill Martinez Margot Johnson	Free: All Special Education staff working with students with moderate/severe intellectual disabilities.
<b>Wednesday, December 6, 2023</b> <b>2:30-4:00</b> Zoom Recorded	Transition Series Day 3: Writing ITPs (Post Secondary Goals, Annual Goals)	Free: Event open to staff working with students ages 14-22.
<b>Thursday, December 7, 2023</b> <b>8:30-12:30</b> Zoom, Not Recorded	Day 4: Operating from the Third Side: Supporting Others to Navigate Conflict Presenter: Greg Abell	Free: For all staff, especially Leadership.
<b>Thursday, December 7, 2023</b> <b>2:30-4:00</b> Zoom Recorded Watch Party	Diagnostic Center of S. CA: Multisensory Math! Advanced Math Skills Presenter: Heather Barakat	Free: For all Staff, Gen. Ed. teachers, Admin., Paraeducators
<b>Tuesday, December 12, 2023</b> <b>12:00-3:00</b> Zoom, Not Recorded	UDL/AT Immersion Day 3	Free: Event for all countywide staff.
<b>Wednesday, December 13, 2023</b>	Coaching: Operating from the Third Side: Supporting	Free: For all staff, especially Leadership.

**New Events Added Monthly**

**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

<b>3:30-4:30</b> Zoom, Not Recorded	Others to Navigate Conflict Presenter: Greg Abell	
<b>Thursday, December 14, 2023</b> <b>3:30-4:30</b> Zoom Recorded Watch Party	Diagnostic Center S. CA: Mindfulness Practice: The Educator's Guide to Help Students Practice Mindfulness Presenter: Mojgan Mostael	Free: For all staff, Mental Health Specialists, Counselors and staff working with all students

**January**

**New Events Added Monthly**



**Santa Barbara County SELPA  
Fall 2023  
Professional Development Events**



**January**

**New Events Added Monthly**

**Santa Barbara County SELPA**  
**Fall 2023**  
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<u><b>Date/Time/Location</b></u>	<u><b>Name of Event and Presenter</b></u>	<u><b>Cost/Additional Details</b></u>
<b>Thursday, January 11, 2024</b> <b>1:30-3:30</b> Zoom Recorded	SIRAS Updates, State Testing, Transition to Next Year's Data Presenter: Michael Brown	Event for all staff
<b>Thursday, January 11, 2024</b> <b>8:30-3:00</b> In Person SMB Souza Center	NCPI Presenters: Bethany Schacherer and David Ibsen	Free: Event for all countywide staff.
<b>Wednesday, January 17, 2024</b> <b>9:00-11:00</b> Zoom	504 Module Training Part 1 Presenter: Steve Ombrek	Free: Data Clerks interacting with 504's and leadership
<b>Thursday, January 18, 2024</b> <b>8:30-3:00</b> In Person SBCSELPA	NCPI Presenters: Jennifer Connolly and Natalie Facio-Leon	Free: Event for all countywide staff.
<b>Tuesday, January 23, 2024</b> <b>4:00-7:00</b> Zoom, Not Recorded	Bridge Authorization for Extensive Support Needs Credential Presenters: Dr. Ray Avila and Jennifer Connolly	Bridge Authorization for Mod/Severe, Extensive Support Needs Credential
<b>Wednesday, January 24, 2024</b> <b>4:00-7:00</b> Zoom, Not Recorded	Bridge Authorization for Early Childhood Special Education Credential Presenters: Armando Uribe and Jennifer Connolly	Bridge Authorization for Early Childhood Special Education Credential
<b>Thursday, January 25, 2024</b> <b>4:00-7:00</b> Zoom, Not Recorded	Bridge Authorization for Mild/Mod Support Needs Credential Presenters: Dr. Ray Avila	Bridge Authorization for Mild/Mod Support Needs and ResourceCredential

**New Events Added Monthly**



**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

	and Jennifer Connolly	
<b>Tuesday, January 30, 2024</b> <b>12:00-3:00</b> Zoom, Not Recorded	Digital Tools Day 1	Free: Event for all countywide staff.
<b>Wednesday, January 31, 2024</b> <b>1:00-3:00</b> <b>Zoom</b>	504 Module Training Part 2 Presenter: Steve Ombrek	Free: Data Clerks interacting with 504's and leadership

**Santa Barbara County SELPA  
Fall 2023  
Professional Development Events**

**February**

**Santa Barbara County SELPA  
Fall 2023  
Professional Development Events**



**February**  
**<https://sbcselpa.k12oms.org>**

**New Events Added Monthly**

**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

<b><u>Date/Time/Location</u></b>	<b><u>Name of Event and Presenter</u></b>	<b><u>Cost/Additional Details</u></b>
<b>Thursday, February 1, 2024</b> <b>2:30-4:00</b> Zoom Recorded Watch Party	Diagnostic Center of S. CA: Reading Between the Lines Presenter: Andrea Abrishami	Free: Educators working with students with reading difficulties
<b>Thursday, February 8, 2024</b> <b>8:30-3:00</b> In Person SMB Souza Center	NCPI Presenters: Jennifer Connolly and Alison Lindsay	Free: Event for all countywide staff.
<b>Tuesday, February 13, 2024</b> <b>12:00-3:00</b> Zoom Not Recorded	Digital Tools Day 2	Free: Event for all countywide staff.
<b>Thursday, February 22, 2024</b> <b>8:30-3:00</b> In Person SBCSELPA	NCPI Presenters: Chris Osborn and Alison Lindsey	Free: Event for all countywide staff.
<b>Tuesday, February 27, 2024</b> <b>12:00-3:00</b> Zoom Not Recorded	Digital Tools Day 3	Free: Event for all countywide staff.
<b>Wednesday, February 28, 2024</b> <b>8:30-3:00</b> In Person Santa Maria Bonita with Zoom option	Patterns of Strengths and Weaknesses Presenter: Jenny Ponzuric	Free: Event for all countywide staff.

**March**

**New Events Added Monthly**



**Santa Barbara County SELPA  
Fall 2023  
Professional Development Events**



**March**

<https://sbcselpa.k12oms.org>

**New Events Added Monthly**

**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

<b><u>Date/Time/Location</u></b>	<b><u>Name of Event and Presenter</u></b>	<b><u>Cost/Additional Details</u></b>
<b>Tuesday, March 5, 2024</b> <b>2:00-4:00</b> Zoom Recorded Watch Party	Diagnostic Center of S. CA: Keeping the Day Sane: Mental Health 101 for Paraeducators Presenter: Tim Halphide	Free: Paraeducators, all staff, ERMHS staff, Behaviorists, IEP team members.
<b>Wednesday, March 6, 2024</b> <b>2:30-4:00</b> Zoom, Recorded	Transition Series Day 4: Writing ITPs: Activities and Community Experiences	Free: Event open to staff working with students ages 14-22.
<b>Thursday, March 7, 2024</b> <b>8:30-3:00</b> In Person SMB Souza Center	NCPI Presenters: Phil Pandac and Natalie Facio- Leon	Free: Event for all countywide staff.
<b>Tuesday, March 12, 2024</b> <b>12:00-3:00</b> Zoom Not Recorded	Digital Tools Day 4	Free: Event for all countywide staff.
<b>Wednesday, March 20, 2024</b> <b>2:00-4:00</b> Zoom	Patterns of Strengths and Weaknesses Coaching Presenter: Jenny Ponzuric	Free: Event for all countywide staff.
<b>Thursday, March 21, 2024</b> <b>8:30-3:00</b> In Person SBCSELPA	NCPI Presenters: Natalie Facio-Leon and Rosy Bucio	Free: Event for all countywide staff.

**April**

**New Events Added Monthly**

**Santa Barbara County SELPA  
Fall 2023  
Professional Development Events**



**April**

**<https://sbcselpa.k12oms.org>**

**New Events Added Monthly**



**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

<b><u>Date/Time/Location</u></b>	<b><u>Name of Event and Presenter</u></b>	<b><u>Cost/Additional Details</u></b>
<b>Tuesday, April 9, 2024</b> <b>2:30-3:30</b> Zoom Recorded Watch Party	Diagnostic Center S. CA: Mindfulness Practice: The Educator's Guide to Help Students Practice Mindfulness Presenter: Mojgan Mostael	Free: For all staff, Mental Health Specialists, Counselors and staff working with all students
<b>Wednesday, April 10, 2024</b> <b>1:30-3:30</b> Zoom	Hot Topics in Special Education Presenter: Jan Tomsy Fagen, Friedman, and Fulfrost	Free: Event for all countrywide staff.
<b>Thursday, April 11, 2024</b> <b>8:30-3:00</b> In Person SMB Souza Center	NCPI Presenters: David Ibsen and Bethany Schacherer	Free: Event for all countywide staff.
<b>Thursday, April 11, 2024</b> <b>4:00-5:00</b> Zoom, Recorded	Transition Series Day 5: Writing ITPs: Agency Linkages and Transition Services	Free: Event open to staff working with students ages 14-22.
<b>Tuesday, April 16, 2024</b> <b>12:00-3:00</b> Zoom Not Recorded	Introduction to SAP Day 1	Free: Event for all countywide staff.
<b>Thursday, April 18, 2024</b> <b>8:30-3:00</b> In Person SBCSELPA	NCPI Presenters: Alison Lindsay and Jennifer Connolly	Free: Event for all countywide staff.
<b>Thursday, April 25, 2024</b> <b>2:30-4:00</b> Zoom Recorded Watch Party	Diagnostic Center of S. CA: Multisensory Math! Advanced Math Skills Presenter: Heather Barakat	Free: For all Staff, Gen. Ed. teachers, Admin., Paraeducators

**New Events Added Monthly**



**Santa Barbara County SELPA**  
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**Professional Development Events**

<b>Tuesday, April 30,</b> <b>2024</b> <b>12:00-3:00</b> Zoom Not Recorded	Introduction to SAP Day 2	Free: Event for all countywide staff.
<b>Tuesday, April 20,</b> <b>2024</b> <b>8:30-12:00</b> In Person	Nurses Symposium	Event for all countywide nurses.

**May**

**New Events Added Monthly**

**Santa Barbara County SELPA  
Fall 2023  
Professional Development Events**



**May**

**<https://sbcselpa.k12oms.org>**

**New Events Added Monthly**

**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

<b><u>Date/Time/Location</u></b>	<b><u>Name of Event and Presenter</u></b>	<b><u>Cost/Additional Details</u></b>
<b>Wednesday, May 1, 2024</b> <b>8:30-11:30</b> Zoom Recorded	End of Year Reminders Presenter: Brian Marcontell	Event for CALPADS and MIS Clerks, Administrators
<b>Thursday, May 9, 2024</b> <b>8:30-3:00</b> In Person SMB Souza Center	NCPI Presenters: Sarah Gunn and Rosy Bucio	Free: Event for all countywide staff.
<b>Thursday, May 16, 2024</b> <b>8:30-3:00</b> In Person SBCSELPA	NCPI Presenters: Jermaine Powell and Alison Lindsey	Free: Event for all countywide staff.
<b>Thursday, May 16, 2024</b> <b>5:00-8:00</b> In person Glen Annie Golf Course	SELPA-Bratton Awards Night	Invited Guests

**'Mini' LEA Professional Development Topics Available Upon Request**

Contact Jennifer Connolly [jconnolly@sbceo.org](mailto:jconnolly@sbceo.org) to book a **FREE** presentation.

**Behavior Series**

New Events Added Monthly

## **Santa Barbara County SELPA**

**Fall 2023**

### **Professional Development Events**

#### **Understanding Brain States & Behavior**

Participants will be introduced to the applied science of brain states and behavior regulation. The goal of this mini-PD is for staff to begin to understand the underpinnings for all human escalation cycles and how “behavior” is not unique to students with behavioral challenges. Staff will be guided through current research on the topic and could participate in activities that help integrate the content that is presented.

#### **Supporting Students with Behavioral Needs in School Settings**

This introductory mini-PD offers participants a brief overview of traditional vs brain-based perspectives on student dysregulation and challenges staff to reflect on their own narratives about student problem behavior. Additionally, a variety of proactive evidence-based practices for mitigating challenging behavior will be presented and participants will have an opportunity to apply strategies to case-studies in a small group activity.

#### **How To “Coach” Students**

This mini-PD is focused on practical, hands-on, evidence-based strategies for giving students feedback, offering support, and “correcting” pre-escalation behavior. Staff will reflect on how they like to be “coached” and then apply the scientific information shared to case examples they self-generate. The goal is for participants to walk away with a fresh perspective on how “coaching” vs correcting and/or inadvertent shaming of students could broadly help all the students they serve.

#### **Default vs GROW: How our “Lens” Impacts the Way We Support Students**

This mini-PD will start with a brief review of brain states and how behavior escalates in all humans, followed by an outline of the differences between “default” vs “GROW” lenses. The objective is for participants to understand what influences our perspectives and responses to student behavior and how students, especially students with challenging behavior, deserve scientific coaching practices rooted in dignity not punishment procedures.

#### **Data Collection in Special Education**

## **Santa Barbara County SELPA Fall 2023**

### **Professional Development Events**

**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 several 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.**

#### **SELPA 28: SBCSELPA Continuum of Mental Health Services**

**Late in 2020, an Ad-Hoc Committee was formed to revise the SBCSELPA Continuum of Mental Health. This training is to introduce the new Continuum, discuss its function/limitations, and to provide information on two added services to the Continuum: Social Work Services and Parent Counseling.**

#### **Consulting In Classroom Settings**

## **Santa Barbara County SELPA Fall 2023**

### **Professional Development Events**

**The focus of this training will be on sharing strategies that facilitate collaborative and productive consulting in classroom settings. Specific steps and strategies educational specialists (e.g., BCBAs, MFTs, SLPs) can use to build rapport with team**

**members and establish mutually beneficial communication. In addition, strategies team members (e.g., teachers, paraprofessionals) can also use when collaborating with consultants will also be shared.**

#### **How To Provide Students with Corrective Feedback & Coaching**

**This training will focus on how team members (e.g., teachers, paraprofessionals, administrators) can give students feedback, both positive and corrective, in a constructive manner that optimizes communication.**

#### **SELPA 28A: SBCSELPA Wrap Supports Referral- recorded available on SBCSELPA YouTube Channel**

**The new Santa Barbara County SELPA Wrap Referral is here—and it's fillable! This short training will explain what Wrap supports are, how the referral process works, and how to document on an IEP. This training will be recorded and available for viewing at your convenience.**

#### **Brain-Based Behavioral Perspectives and Support Strategies**

**Drawing from foundations of interpersonal neurobiology, applied developmental attachment, and specific communication skills; participants will gain a functional understanding of how educators can best support students who present with relational and behavioral challenges. Staff will then be able to calibrate their approach to meet the needs of the student as they exist in the moment, supporting emotional resilience and academic success.**

#### **Relational Scaffolding**

**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**

## **Santa Barbara County SELPA Fall 2023**

### **Professional Development Events**

**relationships with their students to support social-emotional development, academic access, and a culture of emotional inclusion.**

#### **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. 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 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.**

**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

**Advanced Refresher**

**The Goal Wizard, Service Logs, and Progress Reports to be reviewed in this one and a half hour training.**

**'Mini' LEA Professional Development Topics Available Upon Request**

**List of events offered updated monthly.**

**Contact Jennifer Connolly [jconnolly@sbceo.org](mailto:jconnolly@sbceo.org) to book a **FREE** presentation.**

**New Events Added Monthly**



# Santa Barbara County SELPA

## Fall 2023

### Professional Development Events

#### June:

- 12: SBUSD: Self Care for Educators
- 12: Manzanita CPI Training
- 12: SBUSD: UDL/AT
- 13: SBUSD: UDL/AT
- 13: SBUSD: Self Care for Educators
- 13: BCBA Training
- 14: SBUSD: New Lens on Behavior

#### July:

- 31-1: SLO SELPA GROW

#### August:

- 1-4: SMJUHSD and Orcutt: Paraprofessional Series and CPI
- 2: SMJUHSD GROW
- 4: LUSD GROW
- 7: Orcutt: SIRAS Beginners Training
- 8: SYVSEC: GROW
- 8: LUSD: SIRAS Training
- 11: SBUSD: Paraprofessional training
- 15: Los Olivos: Wellness for Educators
- 17: SBUSD: Brain States
- 17: SBUSD: IA/Paraprofessional Training 135 people
- 17: SBUSD: A Framework for Supporting the Emotional and Behavioral Needs for our Students
- 21: Hope: CPI Training
- 23: Carpinteria: Special Education (Timelines, Parent Rights, ADR, Elig/Assessment)
- 24: Pediatric Resident Training with Alpha Resource Center: Special Education and SELPA
- 28: SYVUHSD: De-Escalation Strategies

**New Events Added Monthly**

**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

September:

3: SBUSD ParaEducator Training

6: Carpinteria: Autism Behavior Training

7: Los Olivos: Wellness for Educators

18: Family Partnership: A Framework for Supporting the Emotional and Behavioral Needs for our Students

25: SYVUHSD: De-escalation Strategies

October:

4: Carpinteria: Autism Behavior Training

30: SYVUHSD: De-escalation Strategies

November:

17: College SD: Supporting student behavior during everyday school activities

December:

January:

February:

March:

April:

May:

**SBCSELPA Staff**

**5385 Hollister Avenue Bld. 7 Santa Barbara, CA 93111 805-683-1424**

**New Events Added Monthly**

**Santa Barbara County SELPA  
Fall 2023**

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**Professional Development Events**

**Dr. Ray Avila**

[ravila@sbcselfpa.org](mailto:ravila@sbcselfpa.org)

SBCSELPA Executive Director

**Jennifer Connolly**

[jconnolly@sbcselfpa.org](mailto:jconnolly@sbcselfpa.org)

SBCSELPA Coordinator

**Lindsay MacDonald**

[lmacdonald@sbcselfpa.org](mailto:lmacdonald@sbcselfpa.org)

Office Manager

**Brian Helt**

[bhelt@sbcselfpa.org](mailto:bhelt@sbcselfpa.org)

Executive Assistant

**Rachel Wigle**

[rwigle@sbcselfpa.org](mailto:rwigle@sbcselfpa.org)

Chief Business Official

**Alison Lindsey**

[alindsey@sbcselfpa.org](mailto:alindsey@sbcselfpa.org)

Mental Health Manager

**Rosy Mato-Bucio**

[rbucio@sbcselfpa.org](mailto:rbucio@sbcselfpa.org)

SBCSELPA BCBA

Regional Implementation SELPA Lead for C.A.P.T.A.I.N.

**Deborah Umansky**

[dumansky@sbcselfpa.org](mailto:dumansky@sbcselfpa.org)

Clinical Psychologist Intern Supervisor

**Taryn Hurvitz**

[thurvitz@sbcselfpa.org](mailto:thurvitz@sbcselfpa.org)

Audiologist

**Lisa Foote**

[lfoote@sbcselfpa.org](mailto:lfoote@sbcselfpa.org)

SBCSELPA AT/AAC Specialist

**Natalie Facio-Leon**

[nfacioleon@sbcselfpa.org](mailto:nfacioleon@sbcselfpa.org)

Mental Health Specialist (Bilingual)

**Stephanie Kim**

[skim@sbcselfpa.org](mailto:skim@sbcselfpa.org)

WRAP Facilitator

**Tina Kurrels**

[tkurrels@sbcselfpa.org](mailto:tkurrels@sbcselfpa.org)

WRAP Facilitator

**New Events Added Monthly**

# Santa Barbara County SELPA

## Fall 2023

### Professional Development Events

<b>Rachel Bidinost</b>	<a href="mailto:rbidinost@sbcsepa.org">rbidinost@sbcsepa.org</a>
Youth Support Specialist	
<b>Tania Nunez</b>	<a href="mailto:tnunez@sbcsepa.org">tnunez@sbcsepa.org</a>
Youth Support Specialist	
<b>Jazmin Estebez</b>	<a href="mailto:jestebz@sbcsepa.org">jestebz@sbcsepa.org</a>
Youth Support Specialist	
<b>Alex Holdom</b>	<a href="mailto:aholdom@sbcsepa.org">aholdom@sbcsepa.org</a>
Youth Support Specialist	

#### Professional Development Presenter(s) Information

<b>Dr. Ray Avila</b>	<a href="mailto:ravila@sbcsepa.org">ravila@sbcsepa.org</a>
SBCSELPA Executive Director	805-683-1424
<b>Jennifer Connolly</b>	<a href="mailto:jconnolly@sbcsepa.org">jconnolly@sbcsepa.org</a>
SBCSELPA Coordinator	805-683-1424
<b>Alison Lindsey</b>	<a href="mailto:alindsey@sbcsepa.org">alindsey@sbcsepa.org</a>
SBCSELPA Mental Health Manager	805-683-1424
<b>Rosy Bucio</b>	<a href="mailto:rbucio@sbcsepa.org">rbucio@sbcsepa.org</a>
SBCSELPA BCBA	805-683-1424
Regional Implementation SELPA Lead for C.A.P.T.A.I.N.	
<b>Rachel Wigle</b>	<a href="mailto:rwigle@sbcsepa.org">rwigle@sbcsepa.org</a>
Chief Business Official	805-683-1424

**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**  
**P.E.N.T. Team (Behavior)**

**Carrie Hicinbothom**

[chicinbothom@orcutt.net](mailto:chicinbothom@orcutt.net)

SMB BCBA

**Yolanda Horton**

[yhorton@smbds.net](mailto:yhorton@smbds.net)

SMB BCBA

**Rosy Bucio**

[rbucio@sbcsepa.org](mailto:rbucio@sbcsepa.org)

SBCSELPA BCBA

**Phil Pandac**

[ppandac@orcutt-schools.net](mailto:ppandac@orcutt-schools.net)

Orcutt BCBA

**Robert Santiago**

[rsantiago@cusd.net](mailto:rsantiago@cusd.net)

Carpinteria BCBA

**Sarah Gunn**

[gunn.sarah@lud.org](mailto:gunn.sarah@lud.org)

Lompoc USD

**C.A.P.T.A.I.N. Team (Autism)**

**Rosy Bucio**

[rbucio@sbcsepa.org](mailto:rbucio@sbcsepa.org)

Regional Implementation SELPA Lead for C.A.P.T.A.I.N.

SBCSELPA BCBA

**Yolanda Horton**

[yhorton@smbds.net](mailto:yhorton@smbds.net)

SMB BCBA

**Lauren Hoffman**

[hoffman.lauren@lud.org](mailto:hoffman.lauren@lud.org)

LUSD BCBA

**Jermaine Powell**

[jpowell@sbunified.org](mailto:jpowell@sbunified.org)

SBUSD BCBA

**Donna Todaro**

[dtodaro@sbceo.org](mailto:dtodaro@sbceo.org)

SBCEO Special Education Teacher

**Meghan Davy**

[mdavy@alphasb.org](mailto:mdavy@alphasb.org)

Advocacy Systems Specialist

**New Events Added Monthly**

# Santa Barbara County SELPA

## Fall 2023

### Professional Development Events

Alpha Resource Center

**Ivan Alvarez**

[ialvarez@sbceo.org](mailto:ialvarez@sbceo.org)

SBCEO School Psychologist

**Haley Smith**

[hsmith@hopeschooldistrict.org](mailto:hsmith@hopeschooldistrict.org)

Hope BCBA

#### CPI Presenters North County

**Sarah Gunn**

[gunn.sarah@lusd.org](mailto:gunn.sarah@lusd.org)

**Bethany Schacherer**

[bschacherer@smbd.net](mailto:bschacherer@smbd.net)

**Phil Pandac**

[ppandac@orcutt-schools.net](mailto:ppandac@orcutt-schools.net)

**Alison Lindsey**

[alindsey@sbcsepa.org](mailto:alindsey@sbcsepa.org)

**Jennifer Connolly**

[jconnolly@sbcsepa.org](mailto:jconnolly@sbcsepa.org)

**Rosy Bucio**

[rbucio@sbcsepa.org](mailto:rbucio@sbcsepa.org)

**Natalie Facio-Leon**

[nfacio-leon@sbcsepa.org](mailto:nfacio-leon@sbcsepa.org)

**David Ibsen**

[dibsen@buelltonusd.org](mailto:dibsen@buelltonusd.org)

#### CPI Presenters South County

**Jermaine Powell**

[jpowell@sbunified.org](mailto:jpowell@sbunified.org)

**Chris Osborne**

[cosborne@sbunified.org](mailto:cosborne@sbunified.org)

**Alison Lindsey**

[alindsey@sbcsepa.org](mailto:alindsey@sbcsepa.org)

**Jennifer Connolly**

[jconnolly@sbcsepa.org](mailto:jconnolly@sbcsepa.org)

**Rosy Bucio**

[rbucio@sbcsepa.org](mailto:rbucio@sbcsepa.org)

**Natalie Facio-Leon**

[nfacio-leon@sbcsepa.org](mailto:nfacio-leon@sbcsepa.org)

New Events Added Monthly

**Santa Barbara County SELPA**  
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**Professional Development Events**

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**ADR Cadre**

**Jennifer Connolly**

[jconnolly@sbcselfpa.org](mailto:jconnolly@sbcselfpa.org)

SBCSELPA Coordinator

**Patty Moore**

[pjmoore@alphasb.org](mailto:pjmoore@alphasb.org)

Alpha Resource Center

Manager, Children, Family & Advocacy Services

**Dr. Karla Curry**

[kvcurry@sbunified.org](mailto:kvcurry@sbunified.org)

Program Facilitator, SBUSD

**Amy Gillespie**

[agillespie@buelltonusd.org](mailto:agillespie@buelltonusd.org)

Santa Ynez Valley Consortium School Psychologist

**Beverly Sherman**

[bsherman@buelltonusd.org](mailto:bsherman@buelltonusd.org)

Santa Ynez Valley Consortium Coordinator

**Rusty Gordon**

[rgordon@smbsd.net](mailto:rgordon@smbsd.net)

Orcutt, Director of Special Education

**Meghan Davy**

[mdavy@alphasb.org](mailto:mdavy@alphasb.org)

Advocacy Systems Specialist

Alpha Resource Center

**Nathan Moreno**

[nmoreno@gusdbobcats.com](mailto:nmoreno@gusdbobcats.com)

Guadalupe, Director of Special Education

**Ashley Johnson**

[ajohnson@sbceo.org](mailto:ajohnson@sbceo.org)

SBCEO, Coordinator

**Stacy Tolkin**

[stacysbcs@gmail.com](mailto:stacysbcs@gmail.com)

Santa Barbara Charter, Director of Special Education

**Dr. Ray Avila**

[ravila@sbcselfpa.org](mailto:ravila@sbcselfpa.org)

SBCSELPA Executive Director

**New Events Added Monthly**

**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**  
**Available Resources**

**OMS Calendar of Events** <https://sbcselpa.k12oms.org/>  
Professional Development  
**SBCSELPA Local Plan** [www.sbcsepa.org](http://www.sbcsepa.org)  
Educators, Parent Resources  
**SBCSELPA Procedural Handbook** [www.sbcsepa.org](http://www.sbcsepa.org)  
Educators, Parent Resources  
**Special Education Parent Handbook** [www.sbcsepa.org](http://www.sbcsepa.org)  
**Turning 3: Transition from Early Start to Preschool** [www.sbcsepa.org](http://www.sbcsepa.org)

**SIRAS Systems (IEP development)** <https://www.sirassystems.org>  
Educators Resources  
**SBCSELPA website for all recorded trainings**  
**Santa Barbara SBCSELPA Conference Room** [bhelt@sbceo.org](mailto:bhelt@sbceo.org)  
To book Santa Barbara SBCSELPA Conference Room  
Back2School Padlet of Resources  
<https://padlet.com/mslaterselpa4200/trcig7ygv4ood8uvback2school>

**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 2<sup>nd</sup> St. Buellton, CA 93427**

**South: SBCSELPA Conference Room: 5385 Hollister Avenue Building 7 Santa Barbara, CA 93111 (new location)**

**Zoom Conferencing**

**This Professional Development Offerings Booklet is updated monthly,**



**Santa Barbara County SELPA**  
**Fall 2023**  
**Professional Development Events**

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**Event Flyers by Month**

## 2023-24 LEA/District Cost Associated with Due Process SBCSELPA Account Balances

		<u>23-24</u>	<u>Expended to Date 2023-24</u>	
	Carryover Funding	Allocation		Balance
Adelante		\$ 5,355	\$ -	\$ 5,355.00
Blochman		\$ 5,248	\$ -	\$ 5,248.00
Carpinteria		\$ 7,523	\$ -	\$ 7,523.00
Family Partnership	\$ 10,000.00	\$ 5,501	\$ 10,000.00	\$ 5,501.00
Goleta		\$ 9,306	\$ -	\$ 9,306.00
Guadalupe		\$ 6,526	\$ -	\$ 6,526.00
Hope		\$ 6,103	\$ -	\$ 6,103.00
Lompoc		\$ 16,223	\$ -	\$ 16,223.00
Manzanita		\$ 5,524	\$ -	\$ 5,524.00
Orcutt		\$ 11,024	\$ -	\$ 11,024.00
Santa Barbara Unified		\$ 21,265	\$ -	\$ 21,265.00
Santa Barbara Charter		\$ 5,336	\$ -	\$ 5,336.00
Santa Maria Joint Union High		\$ 15,553	\$ -	\$ 15,553.00
Santa Maria-Bonita	\$ 89,672.23	\$ 25,162	\$ 114,834.23	\$ -
Santa Ynez Consortium		\$ 38,445	\$ -	\$ 38,445.00
SBCEO Direct Services		\$ 15,906	\$ 2,125.00	\$ 13,781.00
<b>TOTAL</b>	\$ 99,672.23	\$ 200,000	\$ 126,959.23	\$ 172,713.00

\*Carryover May be distributed, pending JPA approval at future board meeting

## Expenditures

## Payments to Law Firms:

## TOTAL 2023-24 LEGAL SETTLEMENTS TO DATE

11/16/2023

# 2023-24 Year-to-Date Nonpublic School Placement Costs

REF: VIII-J

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District	# Students Currently Placed	# Students Cumulative Placements	Mental Health Placements				Non-Mental Health Placements SELPA 70% Districts 30% Estimated Cost	Grand Total All Placements	
			SELPA Paid YTD	District Estimated	SELPA Estimated	Total Estimated		District Estimated Cost	SELPA Estimated Cost
Carpinteria Unified	1	1	\$ 6,821	\$ 35,200	\$ 137,520	\$ 172,720		\$ 35,200	\$ 137,520
Lompoc Unified	0	1	\$ -	\$ 2,536	\$ 17,034	\$ 19,569		\$ 2,536	\$ 17,034
Santa Maria Bonita	0	0	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -
Santa Barbara County Education Office - Montecito	0	1	\$ 16,969	\$ 3,472	\$ 18,497	\$ 21,969		\$ 3,472	\$ 18,497
Santa Maria Joint	2	2	\$ 75,723	\$ 125,403	\$ 291,999	\$ 417,402		\$ 125,403	\$ 291,999
Santa Barbara Unified	2	3	\$ -	\$ 121,458	\$ 620,781	\$ 742,238		\$ 121,458	\$ 620,781
Santa Ynez Valley Consortium	1	1	\$ 5,400	\$ 87,584	\$ 252,540	\$ 340,124		\$ 87,584	\$ 252,540
SBCSELPA - Combined Site Visits			\$ -	\$ -	\$ 5,198	\$ 5,198		\$ -	\$ 5,198
<b>TOTAL</b>	<b>6</b>	<b>9</b>	<b>\$ 104,914</b>	<b>\$ 375,652</b>	<b>\$ 1,338,371</b>	<b>\$ 1,714,022</b>		<b>\$ 375,652</b>	<b>\$ 1,338,371</b>

<b>2023-24 Mental Health NPS Placement Budget</b>	<b>\$ 1,650,000</b>
Mental Health NPS Placement Expenses to SELPA (Estimated)	\$ 1,338,371
<b>Mental Health NPS Balance Available (Estimated)</b>	<b>\$ 311,629</b>

<b>2023-24 Non Mental Health NPS Placement Budget</b>	<b>\$ 360,000</b>
TOTAL YTD Non Mental Health Placement Costs (SELPA)	\$ -
<b>Non Mental Health NPS Balance Available (Estimated)</b>	<b>\$ 360,000</b>

**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 funded 70% by SELPA. SELPA pays all invoices and bills the district for 30% of the costs for the 1st year of placement. These are placements that are made through Settlement Agreements for students who do not qualify for Clinical Mental Health services.

## **CLOSED SESSION**

REF: XI-A

**Liability Claims (Gov. Code § 54954.5(d))**

**Claimant:** Goleta Union School District

**Agency Claimed Against:** Santa Barbara County SELPA

SBCSELPA JPA Board Meeting

December 4, 2023