



Walnut Creek Elementary School District

Special Education and Central Office Organizational Review

January 4, 2010



CSIS California School Information Services

January 4, 2010

Patricia A. Wool, Ed.D., Superintendent
Walnut Creek School District
960 Ygnacio Valley Road
Walnut Creek, Ca 94597

Dear Superintendent Wool:

In April 2009, the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement with the Walnut Creek Elementary School District for a review that required FCMAT to perform the following:

- 1) Special Education Review: Due to state budget reductions and increasing operating costs, the district's encroachment from the unrestricted general fund continues to increase each fiscal year. The district requests that the FCMAT team conduct a comprehensive review of the special education department and delivery methodologies with recommendations to reduce the encroachment while meeting the maintenance of effort requirements. The team will provide recommendations, that if implemented will enable the district to serve students in a more cost efficient manner.
 - A.) Evaluate the effectiveness of the assignment process for certificated staff and classroom aides including class size ratios and provide recommendations, if needed.
 - B.) Review the department's implementation of the Response to Intervention Model (RTI) and provide recommendations, if any.
- 2) Organizational Review -Central Office: The district requests staffing comparisons be made for the central office including the Superintendent, Business and Personnel departments. The district requests that staffing comparisons be made to evaluate and ensure effective clerical, program, functionality and administrative support are in alignment with districts of comparable size and structure. The team will make comparisons of six similar size elementary districts by utilizing the Ed Data website or six specific districts selected by the district.

FCMAT

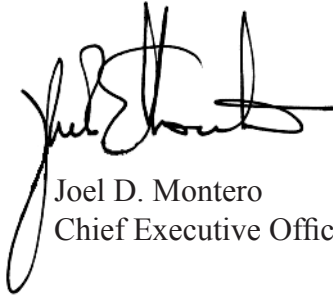
Joel D. Montero, Chief Executive Officer

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FCMAT visited the district to conduct fieldwork, interview staff, and review documents. This report is the result of that effort.

Thank you for allowing us to serve you, and please give our regards to all the employees of the Walnut Creek School District.

Sincerely,

A handwritten signature in black ink, appearing to read "Joel D. Montero". The signature is fluid and cursive, with a long horizontal stroke at the end.

Joel D. Montero
Chief Executive Officer

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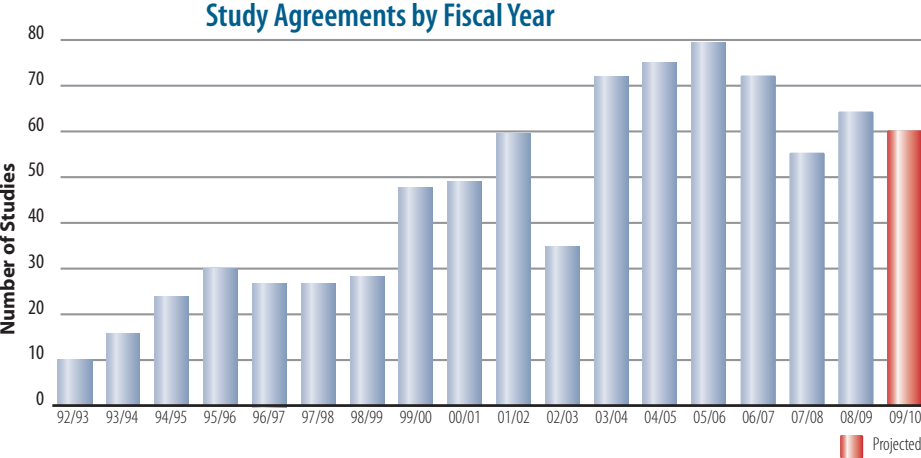
Foreword - FCMAT Background

The Fiscal Crisis and Management Assistance Team (FCMAT) was created by legislation in accordance with Assembly Bill 1200 in 1992 as a service to assist local educational agencies (LEAs) in complying with fiscal accountability standards.

AB 1200 was established from a need to ensure that LEAs throughout California were adequately prepared to meet and sustain their financial obligations. AB 1200 is also a statewide plan for county offices of education and school districts to work together on a local level to improve fiscal procedures and accountability standards. The legislation expanded the role of the county office in monitoring school districts under certain fiscal constraints to ensure these districts could meet their financial commitments on a multiyear basis. AB 2756 provides specific responsibilities to FCMAT with regard to districts that have received emergency state loans. These include comprehensive assessments in five major operational areas and periodic reports that identify the district’s progress on the improvement plans.

In January 2006, SB 430 (charter schools) and AB 1366 (community colleges) became law and expanded FCMAT’s services to those types of LEAs.

Since 1992, FCMAT has been engaged to perform nearly 750 reviews for local educational agencies, including school districts, county offices of education, charter schools and community colleges. Services range from fiscal crisis intervention to management review and assistance. FCMAT also provides professional development training. The Kern County Superintendent of Schools is the administrative agent for FCMAT. The agency is guided under the leadership of Joel D. Montero, Chief Executive Officer, with funding derived through appropriations in the state budget and a modest fee schedule for charges to requesting agencies.



Total Number of Studies.....	743
Total Number of Districts in CA.....	982
● Management Assistance.....	705 (94.886%)
● Fiscal Crisis/Emergency	38 (5.114%)
Note: Some districts had multiple studies.	
● Districts (7) that have received emergency loans from the state.	
(Rev. 1/22/09)	

Introduction

Background

The Walnut Creek Elementary School District is located in the Contra Costa County and serves approximately 3,200 students enrolled in kindergarten through eighth grade. The district operates five K-5 neighborhood elementary schools and one 6-8 intermediate school. Grades K-5 are primarily self-contained, while the intermediate grades offer a mixture of core and elective classes.

The district provides special education programs and support services for 325 students with disabilities. Because of state budget reductions and increasing operating costs, the special education program's encroachment on the unrestricted general fund has increased each fiscal year. The district's goal is to decrease encroachment while continuing to meet the maintenance-of-effort requirements in federal law and deliver quality services to students.

In October 2009, the district requested that FCMAT perform the following.

- 1) Special Education Review: Due to state budget reductions and increasing operating costs, the district's encroachment from the unrestricted general fund continues to increase each fiscal year. The district requests that the FCMAT team conduct a comprehensive review of the special education department and delivery methodologies with recommendations to reduce the encroachment while meeting the maintenance of effort requirements. The team will provide recommendations, that if implemented will enable the district to serve students in a more cost efficient manner.
 - A.) Evaluate the effectiveness of the assignment process for certificated staff and classroom aides including class size ratios and provide recommendations, if needed.
 - B.) Review the department's implementation of the Response to Intervention Model (RTI) and provide recommendations, if any.
- 2.) Organizational Review -Central Office: The district requests staffing comparisons be made for the central office including the Superintendent, Business and Personnel departments. The district requests that staffing comparisons be made to evaluate and ensure effective clerical, program, functionality and administrative support are in alignment with districts of comparable size and structure. The team will make comparisons of six similar size elementary districts by utilizing the Ed Data website or six specific districts selected by the district.

Study Guidelines

FCMAT visited the district on November 2, 2009 to conduct interviews, collect data and review documents. This report is the result of those activities and is divided into the following sections:

- I. Executive Summary
- II. General Fund Encroachment
- III. Certificated Staff and Classified Aides
- IV. Time Management
- V. Organizational Review of the Central Office

Study Team

The study team was composed of the following members:

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*As a member of this study team, this consultant was not representing his employer but was working solely as an independent contractor for FCMAT.

Executive Summary

Because of state budget reductions and increasing operating costs, encroachment on the unrestricted general fund has continued to increase each fiscal year for the Walnut Creek Elementary School District. From 2007-08 to 2008-09, encroachment increased by \$351,447 according to the 08-09 maintenance-of-effort document, and it is expected to rise in the 2009-10 fiscal year.

According to the most recent data, the district placed only three of 358 special education students or .8% in nonpublic schools well within the statewide average of .8%. However, the district contracts with 15 nonpublic agencies (NPAs) to provide services in occupational and physical therapy, speech therapy, psychology assessments, nursing services, behavior support, assistive technology and bilingual assessments. In the 2008-09 fiscal year, these services cost the district \$391,786.35. Districts typically use NPAs placement to provide mandated service when district staff cannot provide similar services. NPAs usually cost approximately 30% more compared to using district staff. Therefore, the district should continue to search for and hire professional service providers as district staff members to eliminate the need for some NPA services and reduce the overall cost of NPA services.

The district operates two types of regional programs under a cooperative arrangement with two neighboring districts, but lacks specific information about the cost of program operations. This critical data includes the cost of administering the program, facilities, maintenance, materials etc. Without this critical information, the district cannot recoup the costs of educating students from neighboring districts. Walnut Creek Elementary also did not bill participating districts for the 2008-09 fiscal year, reducing its income calculation and total revenue thereby increasing the general fund contribution for the 2008-09 fiscal year. The district indicated billing will be corrected this fiscal year for all participating districts.

The district does not bill for either Medi-Cal Administrative Activities (MAA) or Medi-Cal. This practice could produce significant additional resources to help fund speech therapists, school psychologists, school nurses, instructional aides, and occupational therapists. The district should review the eligibility process required to access these reimbursements and contract with a consultant or county office to manage the Medi-Cal billing services

The district is considering changing the job title for the resource specialist (RSP) to instruction support provider (ISP). This change would eliminate the caseload restrictions outlined in the Education Code and the legal requirement for instructional aides. This modification also could reduce the encroachment from the general fund; however, there is confusion among the special education staff about its purpose, the potential impact on teacher caseloads, and the programmatic implications.

The district does not use a formal evaluation to determine the necessity of one-to-one instructional aides. The district also does not incorporate the use of transition or “fading” strategies to promote student independence or provide the necessary support and create opportunities and time lines to decrease the need for one-to-one support from instructional aides. A formal evaluation process for one-to-one aides is available through the Contra Costa SELPA.

The Response to Instruction and Intervention Model is not being systematically implemented, and the Student Study Team (SST) process is fragmented and inconsistent in comparison to best practices. This can lead to overidentification of students for special education and increase the fiscal impact on the general fund.

Because of the state’s fiscal crisis, the district significantly reduced the number of support staff members in the central office. The district maintains a full-time director of special services who performs a number of duties in addition to special education. The position’s special education oversight duties consume a large percentage of time, resulting in limited support for other important areas.

FCMAT compared staffing in the Superintendent, Business and Personnel departments with those of other K-8 elementary school districts in the region. This comparison found that other districts employ an average of 4.05 administrators while Walnut Creek Elementary employs only three full time equivalent (FTE) administrative positions. The average teacher\student staffing ratio in comparable districts is .0029 while the average for Walnut Creek Elementary is .0030.

The district office staffing level is lower than comparison districts. This is achieved by offsetting a high level of high classified staffing positions with administrative staffing that is lower than comparison districts.

Findings and Recommendations

General Fund Encroachment

Because of state budget reductions and increasing operating costs, encroachment on the unrestricted general fund has continued to increase each fiscal year for the Walnut Creek Elementary School District. While special-education spending continues to grow statewide, funding has not kept pace, forcing school districts to “encroach” on general-education revenues to pay the full costs of special education programs. From the 2007-08 fiscal year to 2008-09, encroachment on the unrestricted general fund increased by \$351,447 according to the 2008-09 maintenance-of-effort document, and it is expected to rise again in the 2009-10 fiscal year. The district’s goal is to decrease encroachment on the unrestricted general fund while continuing to meet maintenance-of-effort requirements and delivering high-quality educational services to its students.

In addition to classified and certificated salaries and benefit compensation, several factors significantly affect the special education budget. FCMAT reviewed nonpublic schools and agencies, due process and complaint costs including legal fees, county office programs and regionalized programs. A review of special education budgets may help determine whether there are opportunities to maximize revenue for the district.

In this study, the allocation from the Contra Costa Special Education Local Plan Area was not reviewed because this is being accomplished through a separate FCMAT study of that SELPA. Detailed information will be available following that review and will be provided to the district under separate documentation. Other areas of income considered included regionalized service billing, Medi-Cal Administrative Activities (MAA) and Medi-Cal.

Nonpublic Schools (NPS)

A nonpublic school is certified by the State Department of Education, nonsectarian, and under contract with the district. The NPS provides the appropriate facilities, special education, designated instruction and services required by the individual with exceptional needs when no appropriate public education program is available (EC 56345).

In 2008-09, three Walnut Creek Elementary students were placed in a nonpublic school, one student was placed in conjunction with Contra Costa Mental Health and the other two students were placed in local nonpublic school programs. Three of the district’s 358 special education students, or .8%, were in a NPS program compared with the 2007-08 state average of 1% according to the most recent data available.

In 2009-2010 four district students are placed in a nonpublic school, two students in conjunction with Contra Costa Mental Health. The total cost for NPS placements increased from \$177,610.15 in 2008-09 fiscal year to a projected \$212,902.50 in the 2009-10 fiscal year. This projected increase of \$35,292.35 occurred because of the following three factors:

- A late placement and therefore a partial-year billing occurred in 2008-09.
- One additional student was placed in the 2009-2010 fiscal year.
- Increases in NPS daily rates.

The district does not use the SELPA master contract for these placements, but utilizes the SELPA's negotiated rates and list of nonpublic schools to ensure the schools are certified. Education Code 7572.5 (c) (1) indicates that when a placement is made in conjunction with mental health, the placing agency functions as the lead case manager. The district is therefore obligated to provide the educational portion of these placements.

One student enrolled in a nonpublic school was previously in a county office program, and the other students were placed in district programs. The district developed behavior plans for these students before referring them to a NPS, but did not complete a functional analysis and behavior intervention plan.

The special education director is involved with each Individualized Education Plan (IEP) for NPS students. However, the staff indicated that IEPs do not contain a specific transition plan to return the students to a district program.

The SELPA has a process for districts to request reimbursement for NPS costs that surpass a predetermined threshold. The district requested this reimbursement for 2008-09, receiving \$4,385, and plans to request it for 2009-10 for a projected \$5,394. It is important to track costs and request reimbursement in a timely manner to ensure continued access to these resources.

Recommendations

The district should:

1. Use the SELPA contract, certified list and negotiated rates for all NPS placements.
2. Ensure that a behavior intervention plan is completed and implemented before referring a student to a NPS when appropriate.
3. Include in each IEP for a NPS student a specific transition plan to return the student to a district program as soon as possible.

4. Continue monitoring and billing for any SELPA reimbursement for a NPS placement.
5. Determine whether the student could be served in a county office program before placement in a NPS setting.

Nonpublic Agencies

A nonpublic agency is certified by the State Department of Education, nonsectarian, and under contract with the district to provide the appropriate special education designated instruction and services required by the individual with exceptional needs when no appropriate public education program is available (EC 56345).

In the 2008-09 fiscal year Walnut Creek Elementary contracted with 15 nonpublic agencies (NPAs) for a cost of \$391,687.35. NPAs provided services in the areas of physical therapy, speech, psychology assessments, nursing, occupational therapy, behavior support, assistive technology, and bilingual assessments.

In the 2009-2010 fiscal year, the district has contracts with eight NPAs for a cost of \$255,153.85 or \$136,533.50 less than last year. The district still contracts for occupational therapy services, physical therapy, behavior assessments/support, assistive technology and a nurse. As with nonpublic schools, it is impossible to anticipate whether these costs will increase or decrease during the school year.

Five of the eight district contracts with NPAs are for \$8,000 or less, and it is unlikely that the district could provide these services for less.

The district contracts with a NPA for physical therapy services for 13 students at a cost of \$38,653. Several of the students receive this therapy in a county office program.

Sixty students receive occupational therapy through an NPA at a cost of \$138,060. The district is trying to hire a full-time occupational therapist. Based on the district salary schedule, hiring one full-time occupational therapist would result in a cost savings of approximately \$60,000 per year.

The district does not employ a certified occupational therapy assistant (COTA) to work in conjunction with the part-time district occupational therapist. A COTA cannot perform assessments, but can provide IEP-required therapeutic sessions, enabling the occupational therapist to have a larger caseload.

Recommendations

The district should:

1. Review each IEP that includes physical therapy to determine whether district/county office staff members such as the adaptive physical education teacher (APE) could implement the goals, reducing the cost of the contract.
2. Continue trying to hire a full time occupational therapist to replace the occupational therapist contracted by the nonpublic agency.
3. Pursue hiring a COTA to provide the appropriate students with therapy. This would enable students receiving services from the NPA occupational therapist to receive them from the district occupational therapist, reducing the cost of the NPA contract.

Due Process

The Individuals with Disabilities Education Act (IDEA) provides for mediation and due process to resolve disputes related to educating children with disabilities. This ensures that each child receives a Free and Appropriate Public Education (FAPE) tailored to his or her unique needs (20 U.S.C. 1401 Section 300.507).

A complaint can be filed against the district with the Department of Education alleging a violation of federal or state law or regulation relating to the provision of a FAPE (20 U.S.C. 300.507).

The district had no due process filings in 2008-09 but had two complaints filed this year. An attorney was retained in 2008-09, but did not use all the hours in the contract, so the number was reduced in the 2009-10 fiscal year for a savings of \$13,875. A \$28,543 settlement for legal fees occurred in the 2008-09 fiscal year.

The staff indicated Walnut Creek Elementary has fewer due process filings and complaints and lower costs than other SELPA districts. The special education director contacts the SELPA for consultation when needed, minimizing legal costs.

Recommendations

The district should:

1. Continue using the SELPA resources to contain litigation costs.

County Office Programs

The district has 13 students in a program operated by the Contra Costa County Office of Education this year and had 18 students in these programs in 2008-09. The cost per student in a county office program was approximately \$26,500 in the 2008-09 fiscal year and is projected to be \$27,500 in the 2009-10 fiscal year. The program cost includes occupational therapy, speech, and adaptive physical education, but not physical therapy, transportation, or additional aide support. If these related services are required, the district is either billed (transportation and aide support) or contracts to provide the service (physical therapy). The type of county office program does not affect the cost.

Students in County Office Programs by Grade and Eligibility

GRADE	AUTISM	EMOTIONAL DISTURBANCE	MENTAL RETARDATION	ORTHOPEDIC IMPAIRMENT
Prekindergarten			1	
1				1
2	1			
3	1			
4	1	2	1	1
5				
6		2		
7	1			
8		1		

Source :Contra Costa County program document

The above table shows that Walnut Creek Elementary lacks significant clusters of students by age or eligibility and therefore could not develop cost-effective district programs. Except for students who require more involved nursing services, the students in county office programs tend to have more behavioral issues than the students in district programs.

The students in the programs operated by the county office do not tend to return to a district program according to staff members. They also indicated that transition plans are not included in their IEPs. Before being referred to a county office program, one or more students had a behavior support plan. However, none of the students had a full functional analysis and behavior intervention plan.

Recommendations

The district should:

1. Review the IEP for each student in the county office programs to ensure that the student's goals cannot be implemented in a district program.
2. Develop a transition plan for students who can return to a district program.
3. Ensure that a functional analysis and behavior intervention plan are developed and implemented when appropriate before referral to a county office program.

Regional Programs

The district operates two types of preschool programs, the Early Intervention Program and the nonintensive program, and both include students from two neighboring districts. The three districts developed a billing system for the different classes based on actual costs at the time the program was developed.

The Early Intervention Intensive Program costs \$52.01 per hour. The district director calculates costs, submitting a bill to the student's district of residence. However, another district hires the tutors assigned to the program and bills Walnut Creek Elementary, which bills the district at the hourly rate. If the tutors are not fully occupied in serving students, Walnut Creek still pays for their time.

The nonintensive program cost was calculated using actual staff costs with an additional factor of \$10,000 to cover all other expenses. Students are enrolled in this program for different amounts of time per week, but the billing occurs per year billing at \$3,825 a student.

Memorandums of understanding (MOUs) with the three districts have not been renegotiated for the 2009-10 fiscal year to incorporate any changes in staff salaries or other costs. Further the amount negotiated for the intensive program did not take into account the cost of administering the program, facilities, maintenance, materials etc. The amount negotiated for the nonintensive program excluded additional costs for operation, and it is unclear what the figure actually included.

Without specific information regarding the costs of program operation, it impossible to determine whether it is cost-effective to continue including out-of-district students in these programs.

In addition to known costs, the district should consider the following two factors in deciding whether to continue the current arrangement:

- Could the district hire the tutors necessary for the intensive program?
- Would the district need the present program staffing?

Recommendations

The district should:

1. Complete an informal audit to determine the actual cost of operating the intensive and nonintensive preschool programs that include students from neighboring districts. In addition to staffing, all cost areas should be included such as the following:
 - Facilities
 - Maintenance
 - Utilities
 - Administrative support from special education
 - Business department support for billing
2. Determine in this audit whether the district could hire the tutors needed for the intensive program.
3. Determine whether the current program staffing level would be necessary if out-of-district students were excluded.
4. Following this audit, determine whether it is cost-effective for the program to continue including out-of-district students and perform one of the following:
 - a. Renegotiate the MOUs for these programs to reflect actual costs or
 - b. Determine that is not cost effective and notify the districts of the change.

Other Factors

The following three other factors have also affected the special education budget.

- The district did not bill for students in the nonintensive program in the 2008-09 fiscal year. This resulted in a reduction in the income calculation that increased the general fund contribution by a reported \$180,000 last year. Billing is accomplished through the SELPA and will be corrected this year.
- American Reinvestment and Recovery Act (ARRA) money for preschool materials is included in this year's budget. This amount is \$158,000 more than was included in last year's budget and inflated the current budget.

- The district does not bill for MAA or Medi-Cal.

Medi-Cal Administrative Activities (MAA) and Medi-Cal

MAA

In 1995, the state developed the MAA program to provide a method of federal reimbursement for health-related administrative activities performed by school districts for at-risk children from newborn to 21 years of age. Payment is based on the cost of providing eligible health-related outreach activities. The categories generally include the following:

- Outreach/public awareness and information
- Facilitating Medi-Cal applications
- Referral, coordination, and monitoring of Medi-Cal services
- Transportation-related activities supporting Medi-Cal services
- Translation related to Medi-Cal services
- Program planning, development, and coordination related to Medi-Cal services

Examples of program staff that might perform MAA activities include the following:

- Special education staff
- School administrators
- Nurses, health clerks, health aides
- School psychologist, counselors
- Speech language pathologists
- Healthy start staff members
- Child development programs
- State preschool programs

MAA claims for federal reimbursement of activities are submitted quarterly based on a weeklong time survey. MAA claims are based on a time study (personnel time allocated to outreach activities); the Medi-Cal eligibility rate of the district's entire student population; the Federal Financial Participation (FFP) rate; and an analysis of the school's financial records. Schools can receive a reimbursement of approximately 50%, and these funds are unrestricted.

Medi-Cal

The purpose of the Local Education Agency (LEA) Program is to do the following:

1. Provide comprehensive health service to eligible Medi-Cal students and their families when applicable.
2. Allow districts to become Medi-Cal providers and bill the program for the health services provided by the medical professionals they employ. These include speech therapists, school psychologists, school nurses and occupational therapists and aides assigned to students in the IEP.
3. Facilitate reinvestment in health and social services for students and their families.

Regulations governing the TCM Program are contained in the California Code of Regulations, Title 22, Division 3, Chapter 3, Article 3, and Section 51271. Reimbursement is based on a fee-for-service.

IEP/ Individualized Family Service Plan health, speech, psychological and physical assessments may be billable as well as treatment services for health, speech, psychological and physical therapy including occupational therapy. Transportation to these assessments and services may also be billable.

Because of the complexities of this program, school districts often contract with another entity to ensure that all Medi-Cal eligible students that are under an IEP/ IFSP are accounted for and all billing requirements are fulfilled.

The district does not bill for MAA or Medi-Cal.

Recommendations

The district should:

1. Contact the county office to determine whether it provides assistance with MAA/ Medi-Cal billing.
2. Contact other districts in the SELPA to determine which participates in MAA and Medi-Cal billing for these services and how they administer the programs.
3. Determine whether it would be fiscally beneficial for the district to participate in these programs.

Certificated Staff and Classified Aides

Resource Specialists

The district recently changed the title of the resource specialist to that of instruction support provider, aligning it with 11 other districts in the Contra Costa SELPA. This modification eliminated caseload requirements, but did not result in changes to the program or to the position's job description. In addition, the title change prompted the following issues:

- Some special education teachers were confused by this title change and others were unaware of it. Many perceive it as the district's attempt to bypass the caseload limitation of 28 outlined in EC 56362 (6) (c).
- The change was never discussed with union representatives.

The FCMAT review found that the average caseload or student\teacher ratio for ISP teachers is 25 to one. The district has not violated caseload restrictions; however, greater openness is necessary for the certificated staff to fully understand the purpose of the change, the potential caseloads and the programmatic implications.

The district manually develops Individualized Education Programs (IEPs) and lacks the capacity to obtain data on program frequency and duration, particularly regarding caseloads for ISP and Designated Instructional Services (DIS). This practice ultimately inflates caseload numbers. A review of district procedures found that there are no exit criteria for the ISP (previously RSP) program. As students prepare for transition to general education, transition goals and time lines should be established in the IEP process.

In the previous model, each resource specialist was assigned with a full-time instructional aide consistent with the requirements of EC Section 56362 (f), which states: "At least 80 percent of the resource specialists within a local plan shall be provided with an instructional aide." This was accomplished at a cost of \$156,000. Since the resource specialist designation has been eliminated, the district is not legally obligated provide instructional aide support at the current level.

Special Day Class

The comparative data used to analyze special day class caseloads was developed by School Services of California, Inc. School Services is a consulting firm for educational agencies that provides financial information as well as widely accepted guidelines on appropriate caseloads and class sizes.

District special day classes for the mildly to moderately disabled average 12 students compared with the SSC range of 12 to 15. The middle school class enrollment is 17 students with one student scheduled to be added, and each class has a full-time instructional aide. Two classes have an additional three hours of instructional aide time. The district's special day class enrollment for the moderately to severely disabled ranges

from eight to 10 students, with 2.5 instructional aides. Both of these classes are staffed consistent with SSC guidelines.

The newly formed special day class for autistic students in grades one through four maintains a ratio of one adult to two students. The maximum class size is eight students, which is consistent with SSC guideline. However, the classroom is staffed for eight students and has only four enrolled. The district should monitor the class size and temporarily reassign excess aide support until the class has the full number of students enrolled.

Designated Instruction Services

The average caseload for speech and language specialists is 43. EC 56363.3 requires districts to maintain a SELPA-wide average of 55. As a result, the district could reduce its speech therapy services by .5 full-time equivalent (FTE) positions for a yearly savings of \$32,323 and still operate within the legal requirements of the California Education Code Part 30.

Staffing records indicate that .2 FTE of a speech and language specialist is used to work with 15 general education students and three special education students. The funding for this position could be moved to other categorical funding sources, and the remaining three special education students could be reassigned to existing specialists. This would reduce the special education budgets by \$12, 529.

One-to-one Instructional Aides

The district does not have a formal evaluation to determine the necessity of one-to-one aides. Instead, these types of decisions are made solely by the director of special education. The SELPA has defined procedures for this area, but the district uses them only occasionally.

School and district staff members indicated that strategies for students to transition from the use of one-to-one aides are not incorporated into the IEP. This practice is important because it promotes student independence, provides the necessary supports and creates opportunities and time lines to decrease the dependency on one-to-one assistance.

The director of special education monitors the use of one-to-one aides through informal observation. However, general and special education teachers indicated that the aides assigned are sometimes unnecessary and their services are not always maximized.

Recommendations

The district should:

1. Provide clear direction to the staff regarding the possible change from RSP to ISP including the rationale, the programmatic expectations, and the implications for caseloads.

2. Update job descriptions to reflect the change from RSP to ISP.
3. Review ISP caseloads for frequency and duration of services and determine the caseload size appropriate for this program.
4. Consider using a computerized IEP system to help monitor services and caseloads.
5. Reevaluate the decision to provide six hour aides to the RSP at a cost of \$156,000. Under the ISP program design, the district is not legally required to provide aides as it was with the RSP. Another option is for the district to explore using 3.5 hour aides and eliminating the cost of benefits.
6. Communicate with the certificated union representation on the change in job classification for the RSP position.
7. Define the criteria for determining instructional aides and the increase in classroom support above the normal staffing pattern. Is this related to the aides?
8. Redistribute some of the aide time in the autism class until the class size increases.
9. Move the funding for the .2 speech therapist serving regular education students to another categorical area to reduce the special education budget by \$12,529 per year.
10. Increase speech caseloads and reduce speech therapists by .5 FTE positions for a savings of \$31,323 per year. Another option is for the district to partner with a neighbor district and share the salary and costs of the position.
11. Redesign the process for adding one-to-one aides and incorporate the use of SEL-PA procedures.
12. Develop a monitoring process for the use of one-to-one aides, gathering input from general education teachers and principals.

Response to Intervention Model

Response to Instruction and Intervention is a tiered system of instruction that integrates resources from general education, categorical programs, and special education. On November 14, 2008, the state Superintendent of Public Instruction issued the Core Components of Response to Intervention as guidance to California schools, available at the following Web site;

<http://www.cde.ca.gov/sp/se/sr/documents/sldeligibiltyrti2.pdf>

Response to Instruction and Intervention is not systemically implemented at Walnut Creek Elementary. The district is working to expand Tier II in the long-term, but progress is expected to be slow without a curriculum director. The sites lack some materials, resources, and training necessary to operate a fully functioning program.

The district lacks the state-approved supplemental intervention programs that make up a major component of the instructional system as part of the tiered model. There is no indication that universal screening programs are used to screen students at least three times per year in early literacy skills, which include phonological awareness, alphabetic understanding, fluency, vocabulary, and comprehension. Universal screening programs are important in assessing academic and behavioral performance and evaluating the effectiveness of instruction.

The district staff has not received the training necessary to implement Response to Instruction and Intervention, and there is no districtwide training module. The district also lacks a system to collect and analyze data to measure learning rates and levels of performance. The district staff indicated that school teams do not consistently record baseline information.

General education should be the first intervention and should also take the lead in implementing the instructional system.

The district's student study team (SST) process is fragmented and inconsistent, with no district wide guidelines implemented. School site staff members view the SST process as a way of placing students in special education. Effective SSTs accomplish the following:

- Identify and assist students.
 - Help teachers solve problems with students using the collective expertise of other appropriate professionals.
 - Help parents when they have concerns.
 - Help students who request additional support.
 - Improve communication between staff members and between the school and the home.
 - Increase staff commitment to students and to the educational program.
 - Help facilitate referrals to the general education programs at a school site.
 - Coordinate services a student receives.
 - Attempt and to document all reasonable interventions before referring a student to be assessed for special education eligibility.
-
- Document the use of scientific interventions and use of peer reviewed research.
 - Explain the Response to Instruction and Intervention model if used and review progress under this model.

Walnut Creek Elementary has higher identification and eligibility placement for special education students than the SELPA. This could be partly because of the lack of a scientific researched-based intervention model such as Response to Instruction and Intervention. Students are assessed for special education before implementation of researched-based interventions.

For fiscal purposes and identification rates, the Contra Costa SELPA uses the April pupil count from the California Special Education Management Information System (CASEMIS) for those who are newborn to age 22 and the October California Basic Educational Data System (CBEDS) count for those in kindergarten through twelfth grades. In this study, FCMAT used the December Pupil Count from CASEMIS (ages 5-22) and the October count from CBEDS (K-12 only). A review of the data over the past three years indicates that Walnut Creek Elementary is at or below the statewide average identification rate for special education, but maintains a higher average than the SELPA as a whole.

Special Education Identification Rates (K-12)

SCHOOL YEAR	WALNUT CREEK	CONTRA COSTA SELPA	STATE
2006-07	10%	6.1%	10%
2007-08	9.3%	5.4%	10.3%
2008-09	9.1%	6.0%	10.0%

Source: California Special Education Management Information System (CASEMIS) (K-12); CBEDS (K-12) October 2008

FCMAT compared the exit rate from special education in Walnut Creek Elementary with the rate for other elementary districts in the SELPA. The data in the following table represents the percentage of students who left the program to transfer to regular education. The district has made considerable progress in this area.

Special Education Exit Rates 2009

ELEMENTARY SCHOOL DISTRICT	EXIT RATE FOR SPECIAL EDUCATION 2009
Brentwood Union	19.3%
Byron Union	3%
Knightsen Elementary	2.4%
Lafayette Elementary	9.3%
Moraga Elementary	3%
Oakley Union	7%
Orinda Union	4.2%
Walnut Creek Elementary	10.3%

Recommendations

The district should:

1. Develop a master plan that includes a training module for Response to Instruction and Intervention and details the implementation process for that instructional system.
2. Ensure that students receive high-quality standards-based instruction and that all staff members have access to scientific researched-based instruction and interventions.
3. Ensure that the district has appropriate state-approved supplemental intervention programs for tiers II and III.
4. Review universal screening models and determine which will be most appropriate for the district. Dynamic Indicators of Basic Early Literacy Skills (DIBELS) is free through the University of Oregon. Aims web is another option.
5. Determine what progress monitoring system is most appropriate to meet student and district needs.
6. Create or purchase a system for collecting and monitoring progress data. This is an important component to help assess students' academic and behavioral performance and evaluate the effectiveness of instruction.
7. Ensure all staff members obtain extensive training in assessments, data analysis, programs, and researched-based instructional practices and strategies.
8. Ensure that parents are active and participate in all stages of the process to increase the chances of success.
9. Consider whether Response to Instruction and Intervention should be used as part of determining eligibility for a specific learning disability.
10. Develop and implement a districtwide SST process. The process should include the use of Response to Instruction and Intervention before assessing for special education. The San Joaquin County Office of Education has developed an excellent SST Handbook that is available on its Web site.
11. Annually examine the exit rates for special education based on student's return to general education. This information is available from the SELPA CASEMIS and reported on June 30 of each school year.
12. Closely review the identification rates for special education as a whole and by disability area to assist in program development, training and progress monitoring.

Time Management

The district significantly reduced the level of support staff at the central office because of the state's fiscal crisis. As a result, central office administrators have several additional duties.

The district continues to maintain a full-time director of special services who also oversees 504 plans, suspension/expulsion, response to intervention, attendance and home hospital instruction. FCMAT reviewed a time study completed by the director of special services and found that four areas could be redefined to maximize available time in the director's daily schedule. The director is estimated to spend his time as follows:

- IEP meetings – 15 hours
- Evaluating certificated staff members at school sites – Two hours
- Problem solving, writing correspondence, etc – 15 hours
- Billing participating districts for regional program participation per the memorandum of understanding – Two hours

California Education Code Section 56341 defines the required membership of IEP teams. Section (4) (A-C) states that a representative of the local educational agency must meet the following criteria:

- Be qualified to provide, or supervise the provision of specially designed instruction to meet the unique needs of individuals with exceptional needs.
- Be knowledgeable about the general education curriculum.
- Be knowledgeable about the availability of resources of the local educational agency.

The director of special services is not required to attend every IEP meeting as the local educational agency representative (administrative designee). Problematic cases and those involving a change in placement are exceptions. With proper training, the representative of the local educational agency could be the site principal, vice principal, psychologist or other staff member who meets the criteria.

The Education Code also does not require special education teachers to be evaluated by the director of student services. It would be more efficient to assign principals to evaluate teachers, avoiding unnecessary travel time and increasing the focus on district responsibilities.

The director spends almost two days a week in the special education office solving problems and writing correspondence. It may be helpful for the director to work with a mentor to review the types of problematic cases, the length and complexity of correspondence, and the issues that necessitate this level of focus. Greater efficiency can be achieved by streamlining correspondence, identifying the problem areas, and addressing concerns for the future.

The amount of time used to complete the billing process for regional programs is unclear; however, it was listed as an area of concern in the district's time study. To maximize the available time and efficiency of the director of special services, the district should consider whether this function should be assigned to the Business Department.

Recommendations

The district should:

1. Provide training and guidance to district-selected administrative designees so they can attend IEP meetings.
2. Continue assigning the director of special services to attend problematic IEP meetings and those involving a change in student placement.
3. Consider designating the school site principal to evaluate the special education staff.
4. Identify a local mentor to provide guidance and support to the director of special services to increase efficiency in time management.
5. Reevaluate the duties involved in billing for regional programs and determine whether they should be reassigned to the business office.

Organizational Review of Central Office

District Office Administrative Staffing Comparison

To complete this comparison, FCMAT obtained staffing data from six elementary school districts that operate K-8 programs in the Walnut Creek geographic region. The districts were Brentwood, Lafayette, Menlo Park, Millbrae, San Carlos and Belmont-Redwood Shores.

Data was obtained for all administrative and classified support positions in the following district office units: the superintendent's office, human resources, curriculum/instruction, student services/special education and business services. Nonadministrative certificated positions were not reported, and confidential designated positions were included with classified support positions. In business services, only support positions performing financial, accounting, payroll, purchasing and human resources functions were surveyed.

The following two tables summarize the administrative and classified support staffing data compiled for each comparison district. These tables indicate the various titles reported by comparison districts and the full-time equivalent (FTE) positions in each job classification. The total for FTE administrative or classified support positions is reported for each comparison district, as well as a staffing ratio for each district. Finally, the average staffing ratio for all comparison districts (excluding Brentwood) is included.

The table titled "Combined Total District Office Staffing" contains the combined total FTE staffing for each comparison district as well as a total district office staffing ratio. In addition, the average total district office staffing ratio for all comparison districts (excluding Brentwood) is included.

DISTRICT OFFICE STAFFING COMPARISONS K-8 ELEMENTARY SCHOOL DISTRICTS IN WALNUT CREEK REGION									
ADMINISTRATIVE POSITIONS	Walnut Creek	Belmont	Brentwood	Lafayette	Menlo Park	Millbrae	San Carlos		
	3236	2,749	8,247	3,205	2,409	2,135	2,945		
Enrollment*	1.00	1.00	1.00	1.00	1.00	1.00	1.00		
Assistant Superintendent, HR			1.00						
Assistant Superintendent, Curriculum & Instruction			1.00		1.00				
Assistant Superintendent, Educational Services and Personnel		1.00							
Assistant Superintendent of Business Services and Facilities		1.00							
Chief Business Official	1.00		1.00		1.00	1.00	1.00		
Director, Fiscal Services				1.00					
Director of Curriculum/Special Education									
Director of Student Services & Special Education					1.00	1.00			
Director, Curriculum & Instruction, Director of Educational Services				1.00		0.75	1.00		
Director, Student Services (not Spec Ed)			1.00						
Directors of Special Education, Special Services, Students Services and Special Programs	1.00	1.00	1.00	1.00					
Coordinator of Special Education, Program Manager					0.50		1.00		
Total Administrators FTE	3.000	4.000	6.000	4.000	4.500	3.750	4.000		
Ratio**	0.0009	0.0015	0.0007	0.0012	0.0019	0.0018	0.0014		
Average Administrative Staffing	0.0015	per enrolled student							
Average Number of Administrators	4.05								
(Comparison Districts Excluding Brentwood)									
* 2008-09 CBEDS									

DISTRICT OFFICE STAFFING COMPARISONS K-8 ELEMENTARY SCHOOL DISTRICTS IN WALNUT CREEK REGION									
CLASSIFIED SUPPORT POSITIONS	Walnut Creek	Belmont	Brentwood	Lafayette	Menlo Park	Millbrae	San Carlos		
	Enrollment*	2,749	8,247	3,205	2,409	2,135	2,945		
Superintendent's Secretary, Executive Assistant, Administrative Assistant (to the Superintendent)	1.000	1.000	1.000	1.000	1.000	1.000	1.000		
Administrative Assistant, Administrative Assistant to Assistant Superintendent, Administrative Secretary, District Secretary, Secretary, Office Assistant	2.000	2.000	4.000	2.000	2.000	1.625			
Secretaries of Curriculum, Educational Services, Special Education and Special Services		1.500				1.000	2.000		
Personnel Supervisor, Personnel Specialist, HR Specialist, HR Technician, Personnel Technician	1.000	1.000	1.000	1.000	1.000	0.750	1.000		
Personnel Assistant, Personnel Clerk		1.400	0.500						
Substitute Coordinator/Clerk	0.500								
District Office Clerk, Office Assistant	1.000			1.000					
Data Analyst	0.600								
Budget & Accounting Supervisor, Coordinator, Fiscal Services		1.000	1.000						
Payroll & Employee Benefits, Payroll & Health Benefits Coordinator, Admin Asst-Payroll and Benefits	1.000	0.700					1.000		
Fiscal Analyst, Budget Analyst, Business Accounting Tech, Sr. Account Clerk, Payables Technician, General Bookkeeper, Account Clerk, Accounts Payable Clerk	2.000	1.000	3.000	1.000	1.000	2.000	2.000		
Payroll Technician, Sr. Account Clerk-Payroll			1.000	1.000	1.000	0.800			
Purchasing Agent, Purchasing Clerk	0.500		1.000						
Attendance & Accounting Specialist, Student Attendance/Account Clerk				1.000			1.000		
Total Classified Support FTE	9.600	9.600	12.500	8.000	6.000	7.175	8.000		
Ratio**	0.0030	0.0035	0.0015	0.0025	0.0025	0.0034	0.0027		
Average Classified Support Staffing	0.0029	per enrolled student							
Average FTE Classified Support Staff	7.755								
(Comparison Districts Excluding Brentwood)									
* 2008-09 CBEDS									

DISTRICT OFFICE STAFFING COMPARISONS K-8 ELEMENTARY SCHOOL DISTRICTS IN WALNUT CREEK REGION							
COMPOSITE DISTRICT OFFICE STAFFINGS	Walnut Creek	Belmont	Brentwood	Lafayette	Menlo Park	Millbrae	San Carlos
<i>Enrollment</i>	3236	2,749	8,247	3,205	2,409	2,135	2,945
Total District Office Staffing in Designated Areas	12.600	13.600	19.000	12.000	11.500	11.175	12.000
Total District Office Staffing Ratio (Staffing FTE/Enrollment)	0.0039	0.0049	0.0023	0.0037	0.0048	0.0052	0.0041
Average Total District Office Staffing	0.0046	per enrolled student					
Average Total District Office Staff (Comparison Districts Excluding Brentwood)	12.0550						

District Office Administrative Staffing

The average administrative staffing ratio in the comparison districts is .0016. Comparison districts employ an average of 4.05 administrators, and Walnut Creek Elementary employs three district office administrators; the superintendent, chief business official and director of special services.\

Two of the five comparison districts employ assistant superintendents with primary responsibility for curriculum/instruction. Each of the other three utilizes a director-level administrator that manages the curriculum/instruction area.

Unlike each of the comparison districts, Walnut Creek Elementary does not employ an administrator with separate responsibility for curriculum/instruction functions. Instead, curriculum/instruction is among the areas managed by the superintendent. The absence of a separate administrator to manage curriculum/instruction functions is unique among comparison districts.

District Office Classified Support Staffing

The average classified staffing ratio in the comparison districts is .0029. Comparison districts employ an average of 7.755 FTE classified support staff, and the classified staffing ratio at Walnut Creek Elementary is .0030. The two districts closest in enrollment to Walnut Creek Elementary (Lafayette and San Carlos) have average staffing ratios of .0026. Each employs eight district office classified support staff members.

Walnut Creek Elementary has classified support staffing similar to that of the comparison districts. However, a lower staffing ratio exists in the two districts closest in enrollment to Walnut Creek Elementary. Employing classified support staff at a ratio of .0026 per enrolled student (the average ratio in Lafayette and San Carlos) would result in a reduction from 9.6 FTE to 8.41 FTE for Walnut Creek Elementary.

Combined District Office (Administrative and Classified) Staffing

The average combined district office staffing ratio in the comparison districts is .0044. Comparison districts employ an average of 11.805 total district office staff, while Walnut Creek Elementary employs 12.6 FTE; .0039 per enrolled student.

The comparison subgroup of Lafayette and San Carlos with enrollments closest to Walnut Creek Elementary has an average total staffing ratio of .0043 (12.533 FTE).

Walnut Creek Elementary has a total district office staffing level that is lower than the comparison districts based on reported staffing ratios per enrolled student (.0044 vs. WCSD's .0039). The total district office staffing ratio of .0039 is also lower than the average ratio in Lafayette and San Carlos, which is .0043.

In each of the above comparisons, Walnut Creek Elementary achieves a lower combined staffing ratio by offsetting a higher classified staffing level with administrative staffing that is lower than the comparison districts.

District Office Organization

Walnut Creek Elementary has a total district office staffing level that is comparable to staffing in Lafayette and San Carlos, the districts with the most similar average enrollment. However, classified support staffing at Walnut Creek Elementary is higher than these districts by approximately 1.2 FTE (adjusted for enrollment). This result is achieved by offsetting a higher classified staffing level with lower administrative staffing.

A review of the existing organizational structure at Walnut Creek Elementary suggests the opportunity for some staffing/assignment modifications that are detailed below and reflected in the organizational charts included in appendix section of this report. The existing classified support staffing for superintendent, business and personnel functions is shown in the first chart. The total FTE classified support for superintendent, business and personnel functions is 8.6.

SUPERINTENDENT

1.0	Administrative Assistant	Administrative support for Supt and Board
1.0	District Office Secretary	Administrative support for C&I functions / D.O. receipt
1.0	Human Resources Specialist	District HR functions
0.6	Data Analyst	Data management, student info/assessment & reporting
0.5	Sub Coordinator/Clerk	Certificated and classified substitute assignment

BUSINESS

1.0	Payroll & Health Benefits Coordinator	Payroll/Employee benefits functions
1.0	General Bookkeeper	Food service accounting/accounts receivable
1.0	Account Clerk	Attend accounting, statistical & financial records & reporting
0.5	Purchasing Clerk	Purchase order processing
1.0	Office Assistant	Data management, student info/assessment & reporting

Recommendations

The district should:

1. Consider implementing the organizational structure depicted in the appendix section of this report. This would reduce the number of existing FTE positions in the superintendent's office and business office from 8.6 to 7.75. Further, the total number of full-time and part-time positions would be reduced from 10 to eight, resulting in lower costs to the district for employee benefits and other personnel expenses.
2. Eliminate the substitute coordinator/clerk position in the superintendent's office. The district utilizes an automated substitute calling system. The responsibility to monitor the operation of the substitute calling system could be shifted to one of the other positions in that office such as the data analyst. Recruitment and employment of substitute employees should be shifted to the HR specialist.
3. Eliminate the business office's purchasing clerk position. The task of processing of purchase orders should be reassigned to one or both of the new account clerk positions recommended by FCMAT.
4. Eliminate the business office's office assistant position. The duties related to student attendance accounting should be transferred to the data analyst in the superintendent's office. The miscellaneous statistical recordkeeping and financial reporting duties should be reassigned to other positions in the superintendent's office and business office.

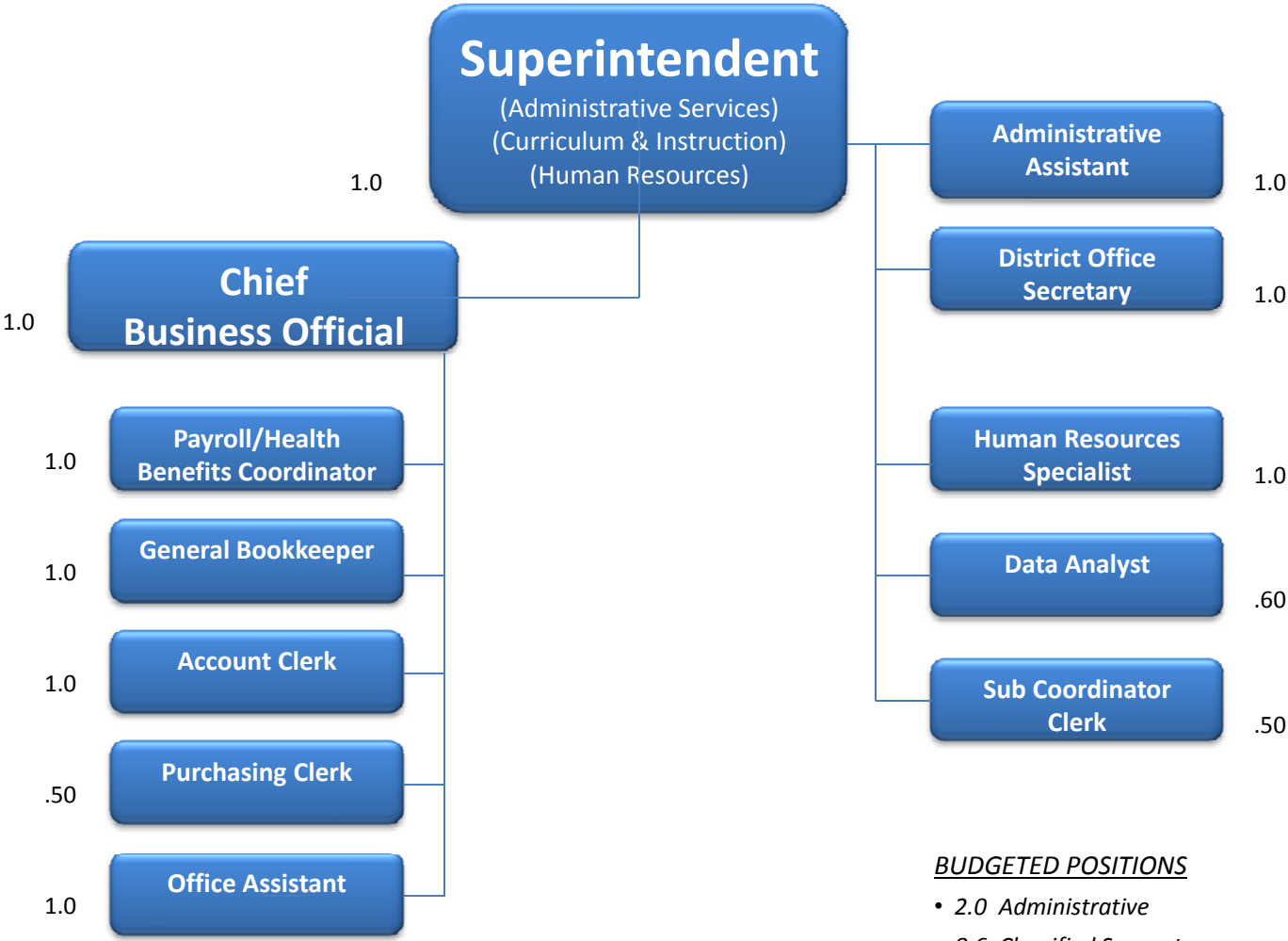
5. Increase the FTEs of the data analyst in the superintendent's office from .6 FTE to .75 FTE
6. Create a fiscal analyst position in the business office to perform the more technically difficult and complex budget management and accounting functions and provide the two account clerks with technical leadership, training and direction. The new position would not be supervisory, but operate as a lead worker in the business office.
7. Change the title of the general bookkeeper position to account clerk.
8. Review the duties of the general bookkeeper, account clerk and office assistant positions in the business office and reallocate them among the new fiscal analysts and the two account clerks.

Appendices

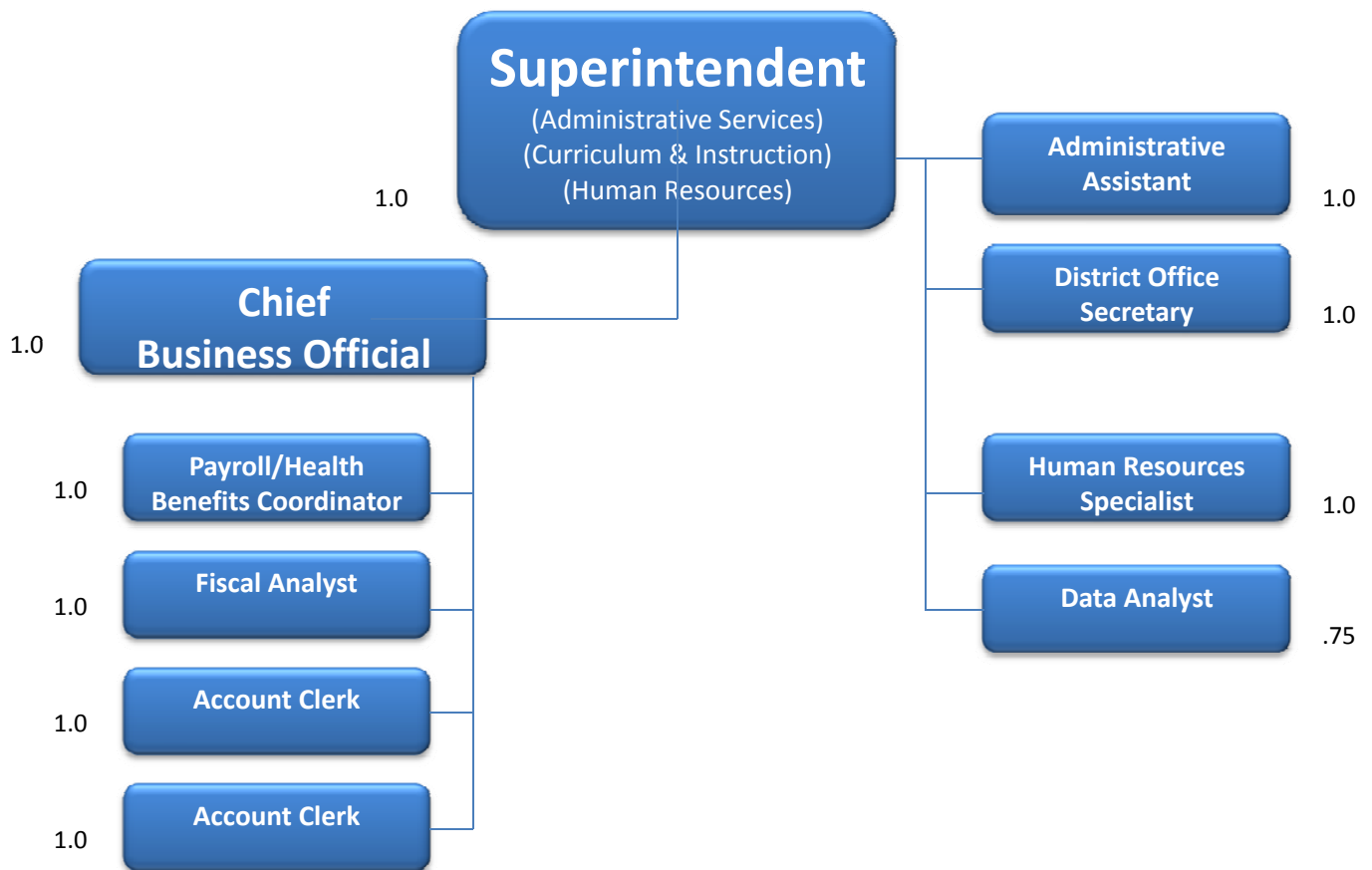
A. Organizational Charts

B. Study Agreement

Walnut Creek School District
Existing District Office Organization Structure
Superintendent, Business and Personnel Offices



Walnut Creek School District
 Alternative District Office Organization Structure
 Superintendent, Business and Personnel Offices



BUDGETED POSITIONS

- 2.0 Administrative
- 7.75 Classified Support

FCMAT

FISCAL CRISIS & MANAGEMENT
ASSISTANCE TEAM

CSIS California School Information Services

FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM STUDY AGREEMENT September 4, 2009

The FISCAL CRISIS AND MANAGEMENT ASSISTANCE TEAM (FCMAT), hereinafter referred to as the Team, and the Walnut Creek Elementary School District, hereinafter referred to as the District, mutually agree as follows:

1. BASIS OF AGREEMENT

The Team provides a variety of services to school districts and county offices of education upon request. The District has requested that the Team provide for the assignment of professionals to study specific aspects of the District. These professionals may include staff of the Team, County Offices of Education, the California State Department of Education, school districts, or private contractors. All work shall be performed in accordance with the terms and conditions of this Agreement.

2. SCOPE OF THE WORK

A. Scope and Objectives of the Study

- 1) **Special Education Review:** Due to state budget reductions and increasing operating costs, the district's encroachment from the unrestricted general fund continues to increase each fiscal year. The District requests that the FCMAT Team conduct a comprehensive review of the special education department and delivery methodologies with recommendations to reduce the encroachment while meeting the maintenance of effort requirements. The Team will provide recommendations, that if implemented will enable the district to serve students in a more cost efficient manner.
 - a. Evaluate the effectiveness of the assignment process for certificated staff and classroom aides including class size ratios and provide recommendations, if needed.
 - b. Review the department's implementation of the Response to Intervention Model (RTI) and provide recommendations, if any.

- 2) **Organizational Review - Central Office:** The district requests staffing comparisons be made for the Central Office including the Superintendent, Business and Personnel Departments. The District requests that staffing comparisons be made to evaluate and ensure effective clerical, program, functionality and administrative support are in alignment with districts of comparable size and structure. The Team will make comparisons of six similar size elementary districts by utilizing the Ed Data website or six specific districts selected by the district.

B. Services and Products to be Provided

- 1) Orientation Meeting - The Team will conduct an orientation session at the District to brief management and supervisory personnel on the procedures of the Team and on the purpose and schedule of the study.
- 2) On-site Review - The Team will conduct an on-site review at the District office and at school sites if necessary.
- 3) Progress Reports - The Team will hold an exit meeting at the conclusion of the on-site review to inform the District of significant findings and recommendations to that point.
- 4) Exit Letter - The Team will issue an exit letter approximately 10 days after the exit meeting detailing significant findings and recommendations to date and memorializing the topics discussed in the exit meeting.
- 5) Draft Reports - Sufficient copies of a preliminary draft report will be delivered to the district administration for review and comment.
- 6) Final Report - Sufficient copies of the final study report will be delivered to the District following completion of the review.
- 7) Follow-Up Support – Six months after the completion of the study, FCMAT will return to the District, if requested, to confirm the District’s progress in implementing the recommendations included in the report, at no cost. Status of the recommendations will be documented to the District in a FCMAT Management Letter.

3. PROJECT PERSONNEL

The study team will be supervised by Anthony L. Bridges, Deputy Executive Officer Fiscal Crisis and Management Assistance Team, Kern County Superintendent of Schools Office. The study team may also include:

- A. Bill Gillaspie, FCMAT Chief Management Analyst
- B. James Kennedy, Special Education FCMAT Fiscal Consultant
- C. Anne Stone, Special Education FCMAT Fiscal Consultant
- D. Personnel, FCMAT Consultant

Other equally qualified consultants will be substituted in the event one of the above noted individuals is unable to participate in the study.

4. PROJECT COSTS

The cost for studies requested pursuant to E.C. 42127.8(d) (1) shall be:

- A. \$500.00 per day for each Team Member while on site, conducting fieldwork and analysis at other locations, preparing and presenting reports, or participating in meetings.
- B. All out-of-pocket expenses, including travel, meals, lodging, etc. Based on the scope of work identified in section 2 A, estimated total cost is \$18,200.00. The District will be invoiced at actual costs, with 50% of the estimated cost due following the completion of the on-site review and the remaining amount due upon acceptance of the final report by the District.
- C. Any change to the scope will affect the estimate of total cost.

Payments for FCMAT services are payable to Kern County Superintendent of Schools-Administrative Agent.

5. **RESPONSIBILITIES OF THE DISTRICT**

- A. The District will provide office and conference room space while on-site reviews are in progress.
- B. The District will provide the following (if requested):
 - 1) A map of the local area
 - 2) Existing policies, regulations and prior reports addressing the study request
 - 3) Current organizational charts
 - 4) Current and four (4) prior years' audit reports
 - 5) Any documents requested on a supplemental listing
- C. The District Administration will review a preliminary draft copy of the study. Any comments regarding the accuracy of the data presented in the report or the practicability of the recommendations will be reviewed with the Team prior to completion of the final report.

Pursuant to EC 45125.1(c), representatives of FCMAT will have limited contact with COE or District pupils. The COE and District shall take appropriate steps to comply with EC 45125.1(c).

6. **PROJECT SCHEDULE**

The following schedule outlines the planned completion dates for key study milestones:

Orientation:	November 2, 2009
Staff Interviews:	to be determined
Exit Interviews:	to be determined
Preliminary Report Submitted:	to be determined
Final Report Submitted:	to be determined
Board Presentation:	to be determined
Follow-Up Support:	If requested

7. CONTACT PERSON

Please print name of contact person: Patricia Wool, Ed.D.

Telephone (925) 944-6850 Ext. 101 FAX 925-944-1768

Internet Address: pwool@wcsd.k12.ca.us

Patricia Wool, Ed.D. 9/9/09
Patricia Wool, Ed.D, District Superintendent Date
Walnut Creek Elementary School District

Anthony L. Bridges September 4, 2009
Anthony L. Bridges, Deputy Executive Officer Date
Fiscal Crisis and Management Assistance Team

