Marguerite D. Bulkin
County Superintendent of Schools

TUOLUMNE COUNTY
Superintendent of Schools

Superior Court of California
County of Tuolumne
Honorable Judge Donald Segerstrom
41 W. Yaney Avenue
Sonora, CA 95370

FILED
AUG 11 2016
Superior Court of California
County of Tuolumne
By: _____ Clerk

August 5, 2016

Re: 2015-2016 Grand Jury Report

Dear Honorable Judge Donald Segerstrom,

Pursuant to Penal Code 933 and 933.05, I have attached my response to each finding and recommendation that affects my agency. I plan on releasing my response on my website at www.tcsos.us on August 10, 2016. I wanted to provide you with a copy of my response before I release it to the public.

I wish to thank the Grand Jury for their diligent work and dedication in fulfilling their mission of service to the Court and to the citizens of Tuolumne County. Please contact me should you have any questions or wish to discuss further.

Sincerely,

Marguerite D. Bulkin

Marguerite D. Bulkin
County Superintendent

Enclosures:

1. Agency Response to Report from Superintendent Bulkin
2. Superintendent Bulkin's Response to Grand Jury Recommendations
3. "How Can Tuolumne County Schools Work Together to Better Serve Their Students", a study prepared for the Sonora Area Foundation by School Services of California, Inc. (August 2000)
4. List of independent firms in California who conduct studies of the economic benefits and costs of school district reorganization (June 2016)

RESPONSE TO GRAND JURY REPORT

Report Title: **School Reorganization Committee Report**

Report Date: **August 10, 2016**

Response by: **Marguerite D. Bulkin** **Title:** **County Superintendent of Schools**

FINDINGS

1. I (we) agree with the findings numbered: F1 and F2
2. I (we) disagree wholly or partially with the findings numbered:_____
   (Attach a statement specifying any portions of the findings that are disputed; include an explanation of the reasons.)

RECOMMENDATIONS

1. Recommendations numbered R1 and R2 have been implemented.
   (Attach a summary describing the implementation actions.)

2. Recommendations numbered _____ have not yet been implemented, but will be implemented in the future.
   (Attach a timeframe for the implementation.)

3. Recommendations numbered _____ require further analysis.
   (Attach an explanation and the scope and parameters of an analysis or study, and a timeframe for the matter to be prepared for discussion by the officer or director of the agency or department being investigated or reviewed, including the governing body of the public agency when applicable. This timeframe shall not exceed six months from the date of the publication of the Grand Jury report.)

4. Recommendations numbered _____ will not be implemented because they are not warranted or are not reasonable.
   (Attach an explanation.)

Date: August 10, 2016 Signed: Marguerite D. Bulkin

Number of pages attached: four

Marguerite D. Bulkin
County Superintendent of Schools

TUOLUMNE COUNTY
Superintendent of Schools

Judge of the Superior Court
Honorable Donald Segerstrom
41 W. Yaney Avenue
Sonora, CA 95370

August 10, 2016

Dear Honorable Judge Donald Segerstrom,

I would like to thank Ms. Sandi Romena, Foreperson for the Grand Jury, and the entire membership of the 2015-2016 Tuolumne County Grand Jury for the report dated July 12, 2016, which included an investigation of education related items namely compliance with the Brown Act and school reorganization. In my capacity as the elected County Superintendent of Schools, I am pleased to accept the Grand Jury's Report. I have reviewed the report and wish to send a response, as requested by the Grand Jury, on items related to the findings and recommendations of the Reorganization Committee.

On behalf of the highly qualified staff members who serve our school community's children, I am proud of the work they do each day in advancing the education of our student body, with demonstrated academic progress and distinction toward meeting and exceeding state curriculum standards. Furthermore, we are blessed with a community of supportive families, who volunteer and contribute to the success of our school community at curricular and extracurricular activities that enrich our student's lives and build success in school and beyond.

In the past century and a half, school districts in our county have withstood the demographic changes affecting its enrollment and culture. For many, the school has been, and still is, the centerpiece of their community life. School district enrollment has grown and shrunk over the past century as the natural ebb and flow of population fluctuates within our county. The personality of each school district, if you will, is shaped around each school's culture, and never has the school's commitment to educate every child been diminished by these changes. Notwithstanding, the future success of all of the schools in our county will be directly affected by the State's inability to adequately fund our school's basic needs. Consequently, I concur with the Grand Jury's recommendation that ***"there exists a method, available to the school districts, to save taxpayer funds through cooperation in purchasing and perhaps in other areas of administration"***, and agree to effectively continue to expand on this practice and explore ways to stretch funding and share resources amongst school districts to mitigate the effects of diminishing enrollment. To that end, the school districts have already shared services where feasible without compromising services to our students. Furthermore, I will continue to collaborate with all of the district superintendents, to share common school services such as purchasing, information technology, instructional support and professional development, transportation and bus fleet management and shared administrative support. The following are examples of how this recommendation has already been implemented:

- **Purchasing cooperatives already implemented:** All of the districts in the county already receive lower pricing through Apple, Dell, Office Depot, Staples, Ricoh and most large vendors for school supplies due to a piggyback bid on prices negotiated by the districts, county and/or State. Sysco (food supplier) already provides discount pricing for cafeteria supplies for all school districts based upon the total number of students in the county (regardless of district boundaries). The Tuolumne County Superintendent of Schools conducts joint propane bidding with local propane companies on behalf of all school districts giving districts the lowest price possible for propane. All school districts benefit equally from E-Rate, Mandated by Congress in 1996 and implemented by the FCC in 1997, which provides discounted telecommunications, Internet access, and internal connections to all schools in Tuolumne County, funded by the Universal Service Fund.

- **Information and Network Technology cooperatives already implemented:** All school districts contract with the County Superintendent of Schools for technology services, who serves as a quasi-IT JPA, offering high quality network, security and phone service at a significantly reduced rate than what districts could purchase independently.

- **The Tuolumne Joint Powers Authority (JPA) already implemented:** The Tuolumne JPA, operated by the Tuolumne County Superintendent of Schools, administers property, liability and worker's compensation insurance programs for member school districts in Alpine, Amador, Calaveras and Tuolumne. Each school district in Tuolumne County is a member of the Tuolumne JPA and receives the benefit of the group pricing for insurance, liability and workers compensation and training.

- **Instructional services and professional development cooperatives already implemented:** The school districts within Tuolumne County collaborate with the Tuolumne County Superintendent of Schools, who provide high quality cost efficient professional development, saving districts travel and hotel expenses for State mandated programs and/or required trainings.

- **Bus fleet management cooperative already implemented:** For decades, the Tuolumne County Superintendent of Schools has contracted with one school district (Sonora Union High School District) to manage the county-wide bus fleet and transportation cooperative of special education students who are served by all school districts within Tuolumne County in a Special Education Plan Area (SELPA), a quasi-Transportation JPA. The efficiency of this transportation collaborative for special education is partially dependent on the location of the program sites and the placement of students and their special needs. Each year, the collaborative conducts a demographic and geographic review that analyzes the present location of program, program needs, and population served to develop the most efficient transportation system. Furthermore, all elementary school districts without a bus maintenance/repair shop, contract with the high schools to provide the service. School district bus routes have been consolidated to meet the state required minimum for distance. Also, in 2011, school districts in Tuolumne County coordinated a common student attendance calendar at all school sites to streamline transportation operations and other shared activities. Finally, school districts do not receive funding for home-to-school transportation, nor is it mandated to provide home-to-school transportation to non-special education students.

- **Shared administrative services already implemented:** The authority to employ or reduce district personnel lies with the governing board of each school district. For the past several years, every school district in our county has already implemented some form of shared administrative service. The decision by a governing board to reduce and/or eliminate administrative services must be weighed against minimum statutory requirements for administrative oversight. The motivation to suggest that school districts examine reorganization may be a misinformed desire to reduce administrative statutory requirements. It is unlawful to administer a school without the full time presence of a certificated school administrator, and the statutory role that the school administrative function provides cannot be underestimated.

California Education Code guidance related to "reorganization" in EC35511 sets forth the lawful process by which reorganization may be considered and approved, beginning with a petition.

- If and when 25% of electors in each territory of each affected district (or) majority of Board Members in affected districts petition for reorganization, the petition is transmitted to the Superintendent of Schools who has 30 days to determine the sufficiency of the petition (ie: legitimate voter signatures and/or district board decision by majority vote of each board affected).

- If sufficiency is determined, the petition is transmitted to the County Committee on Reorganization, which for Tuolumne County is the County Board of Trustees. After a host of public hearings and proceedings, the County Committee on Reorganization makes a recommendation and transmits the petition to the State Board of Education (should it get that far).

The process outlined above demands neutrality on behalf of the Superintendent of Schools and the County Committee on Reorganization in order to ensure the public that the determination of sufficiency of petition and the approval process is unbiased. For this reason, the County Superintendent of Schools and/or County Board of Trustees will not prematurely agendize, hold a public hearing or take action on a petition to reorganize unless and until it is transmitted to them through the process outlined above.

There are four possible actions to reorganize (Education Code 35511). The first two possible actions to reorganize listed below are generally referred to as acts of "unionization", and the 3rd and 4th are generally referred to as acts of "unification/deunification". Any of the four scenarios listed below may occur in one of two ways: Petition by 25% of electors in each territory of each affected district; (EC 35700), or petition by majority of Board Members in affected districts. (EC 35700)

1. **Dissolving two or more existing school districts of the same kind and forming one or more new school districts of that same kind**. For example: Sonora High School District + Summerville High School District. (note: all high schools are the "same kind" and all elementary schools are the "same kind").

2. **Forming one or more new school districts of the same kind from all or parts of one or more existing school districts of the same kind.** For example: Sonora High School District + parts of Summerville High School District or vice versa.

3. **Unifying school districts, including the consolidation of all or part of one or more high school districts with all or part of one or more component (elementary) school districts into one or more new unified school districts.** For Example: Summerville High School District + Summerville Elementary School District.

4. **Deunifying a school district, including the conversion of all or part of a unified school district into one or more new high school districts, each with two or more new component (elementary) districts, which would include an action to transfer territory from one district to the newly formed districts.** For example: dividing Big Oak Flat Groveland Unified School District into a new High School District and two new Elementary School Districts.

Notwithstanding the efforts already implemented by school districts to save taxpayer funds, the Grand Jury recommends that "***an independent and definitive study of the economic benefits and costs of school district reorganization be undertaken. The results of this study, and the section of the California Education Code pertaining to school district consolidation, should be actively made available to all Tuolumne County taxpayers and elected officials. Grants from appropriate public or private agencies should be pursued to pay for this study.***"

In 2000, the Sonora Area Foundation hired a school finance consulting agency, School Services of California, Inc., to conduct a study about how school districts might better work together to improve education in Tuolumne County. In the opinion of the consultants, "unionizing and/or unifying school districts makes a lot of sense from a practical standpoint". However, in weighing the disadvantages to unionizing and unifying, the consultants further noted "...according to the majority of governing board members, administrators, teachers, classified staff, and parents that we interviewed, there are concerns that the system replacing the existing system will not be better and may result in loss of identity, loss of access, creation of bureaucracies, reallocation of resources, elimination of programs, etc."

Admittedly, a lot has changed since the last independent study was conducted in 2000, including considerable sharing of resources among school districts as previously mentioned. If however, further information is needed to help inform the public and/or school boards about a decision to reorganize or not to reorganize, given the position of neutrality to which I am bound, I will not demote or promote efforts to seek private funding or grants to fund a study. Secondly, despite the fact that the public had an opportunity to place this matter on a local ballot and have to date failed to get enough signatures to qualify for the ballot, I will continue to encourage the public to take this discussion directly to the electors in the districts affected by the petition to reorganize and/or to school district governing boards that have the legal authority to act by majority vote to forward a petition through the process.

Finally, I wish to ask for the Grand Jury's support to put kids first and focus their investigative efforts towards **investigating the lack of adequate State and Federal funding for schools rather than asking schools with fixed funding to do more with less.** Every child needs a qualified teacher, smaller class sizes, modernized state of the art school facilities, bathrooms, drinking fountains, cafeteria, and playgrounds. Adequate funding is necessary in order to staff our schools with personnel that had once been a mainstay of our school systems such as a registered nurse, licensed school counselor, music teacher, art teacher, physical education teacher, and present day necessities such as school resource officers and safety personnel to keep our children safe from violent intruders. At risk also are extra-curricular programs, athletic competitions, and field trips to provide every child with field experiences to local parks and historical landmarks. Adequate funding is imperative in order to provide every child with updated textbooks and instructional resources for math, English language arts, social studies, and physical and biological sciences. Adequate funding is sorely needed to provide every child access to up to date technological hardware, software, and online capabilities to truly prepare the next generation of leaders. And finally, adequate funding is needed to adequately compensate teachers and support staff for the important work they do in shaping the future generation.

In summary, I look forward to continuing to support school districts in exploring new ideas to continue our work to maximize our resources in order to support and implement cost savings measures with or without a new study.

I wish to thank the Grand Jury for their diligent work and dedication in fulfilling their mission of service to the Court and to the citizens of Tuolumne County. Please contact me should you have any questions or wish to discuss further.

Sincerely,

Marguerite D. Bulkin
County Superintendent

Enclosures:

- "How Can Tuolumne County Schools Work Together to Better Serve Their Students?", A study prepared for the Sonora Area Foundation by School Services of California, Inc. (August, 2000)
- List of independent firms in California who conduct studies of the economic benefits and costs of school district reorganization.(June, 2016)

SCHOOL DISTRICT ORGANIZATION CONSULTANTS

This list of consultants provided herein is intended as a service to those wishing to locate and contact consultants specializing in aspects of school district organization. The content of the listings is as provided by the persons and/or firms named. No California Department of Education endorsement is made or implied by providing this list. Furthermore, the names and firms listed do not necessarily represent a complete or comprehensive listing of all school district organization consultants in California, and are not intended as such.

Listed below are the names, telephone numbers, and e-mail addresses of the consultants. Further information for each consultant (as provided by the firm or individual) is presented on the subsequent pages.

Summarized in an attachment is a list of California Voting Rights Act (CVRA) consultants that was provided by local education agencies. Some of these CVRA attorneys and demographers are also on the school district organization listing of consultants.

<table>
<tr><th colspan="2">Atkinson, Andelson, Loya, Ruud & Romo</th></tr>
<tr><td>Cerritos Office, 562-653-3200
Warren Kinsler wkinsler@aalrr.com</td><td rowspan="2">Pleasanton Office, 925-227-9200
Chesley Quaide, cquaide@aalrr.com
Todd Goluba, tgoluba@aalrr.com</td></tr>
<tr><td>Fresno Office, 559-225-6700
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<tr><td>Sacramento Office, 916-923-1200
J. Scot Yarnell, syarnell@aalrr.com</td><td>San Diego Office, 858-485-9526
Mark Bresee mbresee@aalrr.com</td></tr>
<tr><th colspan="2">Christy White Associates, 619-270-8222</th></tr>
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Heather Daud, hdaud@christywhite.com</td></tr>
<tr><th colspan="2">Dannis Woliver Kelley</th></tr>
<tr><td>Long Beach Office, 562-366-8500
Marilyn Cleveland, mcleveland@DWKesq.com</td><td>Sacramento Office, 916-978-4040
Christian M. Keiner, ckeiner@DWKesq.com
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<tr><td>San Luis Obispo Office, 805-980-7900
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<tr><th colspan="2">Davis Demographics & Planning, 951-270-5211</th></tr>
<tr><td colspan="2">Greg Davis, info@davisdemographics.com</td></tr>
<tr><th colspan="2">DecisionInsite, LLC, 877-204-1392, ext. 1012</th></tr>
<tr><td colspan="2">Ron Van Orden, rvanorden@decisioninsite.com</td></tr>
</table>

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School District Organization Consultants (Continued)

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Fagen Friedman & Fulfrost LLP	
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Inland Empire Office, 951-215-4900 Brian K. Bock, bbock@f3law.com Milton E. Foster, mfoster@f3law.com Christopher D. Keeler, ckeeler@f3law.com	**Sacramento Office, 916-443-0000** Mark S. Williams, mwilliams@f3law.com Paul Thompson, pthompson@f3law.com
Los Angeles Office, 323-330-6300 Peter K. Fagen, pfagen@f3law.com James Ayden, jayden@f3law.com Matthew Vance, mvance@f3law.com	**San Diego Office, 760-304-6000** Peter K. Fagen, pfagen@f3law.com Jordan I. Bilbeisi, jbilbeisi@f3law.com Dean T. Adams, dadams@f3law.com Lynn P. Beekman, lbeekman@f3law.com
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School District Organization Consultants (Continued)

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Terri Ryland, terri@rylandsbc.com	
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School Services of California, Inc., 916-446-7517	
Brianna Garcia, briannag@sscal.com Robert Miyashiro, robertm@sscal.com	Mike Ricketts, miker@sscal.com

California Department of Education contact regarding consultant list:

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Detailed information regarding the consultants starts on next page.

SCHOOL DISTRICT ORGANIZATION CONSULTANTS

Atkinson, Andelson, Loya, Ruud & Romo (www.aalrr.com)

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Fax: 562-653-3333

Warren S. Kinsler, Partner
wkinsler@aalrr.com

The offices of Atkinson Andelson Loya Ruud & Romo provide the following services/expertise regarding school district organization:

- Unifications / Transfers of territory
- California Voting Rights Act / Trustee areas
- Change in election dates
- Representation of both school districts and county committees on school district organization
- Representation in litigation over election fraud and reorganization desegregation criteria

Christy White Associates (www.christywhite.com)

Christy White Associates
348 Olive Street
San Diego, CA 92103

Phone: 619-270-8222
Fax: 619-260-9085

Contact: Christy White, CPA
cwhite@christywhite.com or info@christywhite.com

Christy White and her team offer experience drawn from over twenty-five years in school district organization (SDO) services. CWA has completed dozens of feasibility studies for both school districts and county committees on school district organization. Christy White is the co-author and presenter of a full-day workshop on school district reorganization issues sponsored by the State's Fiscal Crisis and Management Assistance Team (FCMAT). Christy White Associates offers expertise in a complete menu of SDO services, including and not limited to: unification studies, territory transfer studies, computation of funding changes, guidance on State processes and timelines, and practical advice on formulating proposals that are both educationally and fiscally sound.

Dannis Woliver Kelley (www.dwkesq.com)

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Dannis Woliver Kelley continued on next page.

Dannis Woliver Kelley (www.dwkesq.com) (continued)

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Fax: 916-978-4039

Chelsea Olson Murphy, Special Counsel, colsonmurphy@DWKesq.com

Dannis Woliver Kelley provides the full scope of services related to all types of reorganization. Services we provide regularly include:

- Represent districts in reorganization proceeding of all types in negotiations with other parties and districts as well as before local county committees and the State Board of Education.
- Defend against undesired territory transfer attempts, attempts to form new elementary, secondary and unified districts, attempts to unify component elementary districts of existing high school districts, and other types of reorganization.
- Negotiate mutually desired territory transfers and boundary adjustments between adjacent districts, including negotiation of all related contractual terms and conditions.
- Represent districts receiving property transfers arising from the lapsation of a neighboring district.
- Provide general advice and counsel regarding potential, threatened, or desired reorganizations, including impacts of reorganization on bonded indebtedness, bonding capacity, asset division and distribution; employee rights; use of charter schools and other alternatives in lieu of reorganization; and CEQA compliance as it relates to reorganization proposals.

Davis Demographics & Planning (www.DavisDemographics.com)

Davis Demographics & Planning, Inc.
11850 Pierce Street, Suite 200
Riverside CA 92505

Phone: 951-270-5211

Contact: Greg Davis, President,
info@davisdemographics.com

Davis Demographics & Planning (DDP) provides K-12 demographic services and long-range planning. DDP provides detailed, accurate student forecasts and related planning information. Over the past 25 years, hundreds of school districts have used DDP for planning needs. Professional consulting services include:

- Demographic studies
- Comprehensive student forecasts
- Long-range build-out forecasting
- New housing impact
- School siting
- Boundary consulting and redistricting services
- Mapping services
- GIS Planning Software for school district use

DecisionInsite, LLC (www.decisioninsite.com)

101 Pacifica, Suite 380
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Cell: 626-353-2014

Contact: Ron Van Orden, Vice President, rvanorden@decisioninsite.com

As Enrollment Impact Specialists, DecisionInsite provides a combination of enrollment analytics, mapping technology and expertise, all of which help School District Leaders gain a better understanding of their total enrollment picture. Instant access to enrollment forecasts, community demographics, mapped student information, interactive boundaries & residential development data means validating difficult decisions are simpler, with more clarity and transparency.

Specific School District Reorganization Services Include:

- Inter-district boundary change studies/scenarios
- School district unification, consolidation, and formation demographic studies
- Racial and ethnic demographic studies
- Enrollment Forecasts
- School, Grade, and Feeder Re-Configurations
- Student Transit System Consolidations
- New Housing Development Studies
- Student Generation Rate Studies

Dolinka Group, LLC (www.dolinkagroup.com)

8955 Research Drive
Irvine, CA 92618

Phone: 949-250-8300

Contact: Larry Ferchaw, Partner, lferchaw@dolinkagroup.com

School District Reorganization Services Include:

- Demographic studies
- Enrollment projections
- Unifications and territory transfers
- Creation and adjustment of trustee areas
- GIS and mapping services

Fagen Friedman & Fulfrost LLP (www.f3law.com)

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Matthew Vance, mvance@f3law.com

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Fagen Friedman & Fulfrost provides legal services and expertise on all aspects of school organization, including general advice and representation of school districts and county offices of education on the unification process, from the initial petition process through full implementation; negotiating and assisting in the implementation of transfers of property and territory as part of school district reorganizations; advising and representing school districts in all aspects related to changes in boundary and trustee areas, including California Voting Rights Act issues; and representing school districts in litigation and appeals of school organization matters, including undesired and contentious property transfers, among other subjects.

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Jeanette C. Justus Associates assists clients during the school district boundary adjustment or district unification process established by California Education Code. The company performs analyses related to the nine Education Code criteria that must be met to change the boundary or form a new school district and prepares supporting documentation for petition and review at the County Committee level. Additionally, Jeanette C. Justus Associates negotiates with school districts and county departments of education to resolve issues. The firm prepares strategies and schedules, and oversees the coordination of the entire process with all parties involved.

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The offices of Kingsley Bogard provide the following services/expertise regarding school district organization:

- Unifications / Transfers of territory
- California Voting Rights Act / Trustee areas
- Change in election dates
- Representation of both school districts and county committees on school district organization.

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- Establishment of trustee areas for governing board elections
- Territory transfers between school districts
- School district unification, consolidation, and formation
- Racial and ethnic studies
- K-12 and community college expertise

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Lozano Smith provides a broad range of legal services on all issues related to school district organization. Our attorneys have extensive experience in representing numerous school districts and county offices of education around the state in these matters. This includes representation regarding all issues related to school district organization, including but not limited to offering advice and advocacy on the following:

- Unification petitions and the formation of new school districts
- Territory transfer petitions
- Reorganization-related mediation and litigation
- Appearances before county committees on school district organization and the State Board of Education
- Agreements related to consensual reorganizations
- Labor and employment issues stemming from reorganization
- Bond, property and facilities issues
- Trustee area elections and the Voting Rights Act
- Assumption of responsibility for middle school services

Murdoch Walrath and Holmes (www.m-w-h.com)

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- Territory transfers
- District organization and unification
- Representing and advocating client interests and waivers before appropriate State Boards and State, local, and regional agencies
- Coalition building/organizing meetings of community groups, parents, and school representatives
- Surplus property disposition
- Joint use agreements

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Nielsen Merksamer has successfully represented numerous school districts, county offices of education and individuals in all aspects of the reorganization process, including preparation of petitions, feasibility studies and board resolutions pertinent to reorganizations; CEQA guidance; representation at the County Committee level; preparation of appeals in territory transfer matters; preparation and presentation of hearing testimony and evidence before the State Board; advocacy with State Board members, the Legislature (with regard to legislation needed to facilitate a reorganization), and the Governor's office; and litigation concerning reorganization.

As an adjunct to reorganization, Ms. Leoni and Mr. Skinnell specialize in election law and the federal Voting Rights Act and have successfully designed electoral systems (e.g. establishing single member trustee areas), including the necessary demographic and legal analysis, in connection with reorganizations.

Ochoa and Moore Law Firm, P.C. (www.ochoamoorelaw.com)

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Our consultant wrote the school district reorganization law and we have provided services to school districts and county offices and boards of education in dozens of reorganization proceedings. We offer the following services:

- Feasibility studies to analyze the facts of your district in light of the criteria for approval of a proposed petition
- Drafting of a petition, agreements and plans for reorganization
- Advice and representation of districts, petitioners or opposition before the Committee on School District Organization and the State Board of Education
- Advice on proposals on the ballot
- Drawing trustee area boundaries for new or existing school districts
- Advice on implementing approved reorganization proposals including personnel mergers, contract negotiations, collective bargaining and representation before O.P.S.C. and the State Allocation Board

Ryland School Business Consulting (www.rylandsbc.com)

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Ryland School Business Consulting has been in business for almost twelve years. We provide financial and general consulting services to school districts, community colleges, county offices of education, law firms, charter schools, and companies. We have assisted districts and county offices of education with district organization and unification studies, provided the analyses related to the nine education code criteria related to organization, prepared enrollment projections and prepared related supporting documentation.

School Facility Consultants (www.s-f-c.org)

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- Facility master planning
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- Classroom needs assessment
- Residential and commercial industrial development impact analysis, negotiations and fee justifications
- State funding analysis of unification, territory transfer, etc.

School Services of California, Inc. (www.sscal.com)

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School Services of California (SSC) offers a wide range of services for school district reorganization, from calculating the new funding under the Local Control Funding Formula (LCFF) to a complete feasibility study and consulting through the transition process. In several instances when special legislation was needed, SSC's advocates have been successful in securing the necessary statutory changes. SSC also has available an online workshop on school district reorganization issues, co-sponsored by the state's Financial Crisis and Management Assistance Team (FCMAT).

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SONORA AREA FOUNDATION

Creating Community Legacies

"How Can Tuolumne County Schools Work Together to Better Serve their Students?"

A study prepared for the Sonora Area Foundation

August 2000

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Background and Study Objective

First and foremost, this study is about how school districts might better work together to improve education in Tuolumne County. It is not a "one size fits all" master plan for educational delivery, but rather a series of options, suggestions, issues, and challenges. It attempts to respond to the criticism and virtues of operating twelve small school districts. Where opportunities exist for positive change, it offers some encouragement and guidance on how change might successfully be effected.

On the question of unification, combining one or more elementary school districts with a high school district, there is no greater educational debate in Tuolumne County today. A current proposal is poised to go to the State Board of Education (SBE) and would unify the entire Sonora High School area with its feeder elementary school districts. Interesting legal questions regarding the ability of individual governing boards to opt out of the proposal exist. Within the community, there is concerted support and opposition to the proposal and both sides present very compelling arguments in their favor. Ultimately, however, and if approved by the SBE, then the voters in the region will decide.

Past studies and proposals have come and gone, many extolling the virtues of unification and other forms of consolidation. Of those proposals, only minor plans have actually been adopted. It is not surprising either, since school district reorganization is a long and arduous process that requires a major community effort and faith—effort to initiate the petition, see the petition through county and state processes, and then to the ballot box for a "yes" vote; and faith in believing that the resultant product will be better that its predecessor.

Today, there are twelve school districts in Tuolumne County, ranging in size from 28-1,700 students. All of them are relatively small by California standards—the average-size district in California is approximately 5,000 students.

The form of school district organization in Tuolumne County is one of numerous small elementary districts feeding, or sending, students to a single high school district that serves the whole. (There is one exception, the unified district of Big Oak Flat-Groveland.) In rural areas, this form of school district organization is not uncommon. The benefit of this form of organization is that individual elementary districts serve and are controlled by a local community, while having access to a comprehensive high school program. On the other hand, there are advantages to consolidation even in rural areas. Past studies and proposals have highlighted those advantages.

Are there opportunities for the Tuolumne County school districts to work better together? Yes, it would be unrealistic to say all that can be done is being done successfully. Does working together require unification or other forms of consolidation? No, there may be merits to these forms, but other methods may exist and be more or less successful. Within that spirit, the Sonora Area Foundation[1] (the Foundation) launched a major effort to explore these questions and

[1] For more information about the Sonora Area Foundation, please see Appendix A.

Note: A glossary of terms used in this report is contained in Appendix F.

contracted with School Services of California, Inc. (SSC), to provide an independent policy analysis on how the school districts might better work together for the students of Tuolumne County.

Executive Summary

"How can Tuolumne County schools work together to better serve their students?" School Services of California, Inc., on behalf of the Sonora Area Foundation, posed this question and others related to the delivery of educational services to the citizens of Tuolumne County. Foremost, there is a resounding pride, well placed, in the quality of education and the safe and nurturing environment in which learning occurs. There are both opportunities for improvement and programs that work and should be emulated, not destroyed. This report enumerates these points and offers options for the schools to better work together and hopefully further improve the quality of education in the county.

As a result of our independent analysis, the organization of Tuolumne County schools has differing characteristics that can be described as:

- The ultimate in site-based management---highly participatory, lacking bureaucracy, accessible to staff and parents, accountable, and community based.
- Wonderful, safe learning environments—private school-like in size, tenured staff, on a first name basis with students, and with high parental involvement.
- Inefficient—12 governing boards, 12 superintendents, 12 budget and financial reports, nearly 12 transportation systems, etc.
- Inconsistent service delivery—there are pockets of academic excellence and academic mediocrity; there are innovative programs alongside unmet needs, and areas that need service expansion.
- Autonomous and independent—but inclined to work together periodically, primarily at an informal level, with varying degrees of success.

As to working together today, there are many examples of cooperation. The district superintendents meet regularly, both in a formal County Office setting and in informal settings. Teachers periodically meet with other teachers of the same grade level. School districts share computer labs with neighboring districts. Transportation maintenance services are shared among a few districts. Districts share buses, e.g., when one bus is down, a loaner is provided. They share some supply purchases to get the best price. There is cooperation in spelling bees, the Academic Decathlon, GATE, on interdistrict transfer requests, music programs, etc.

But while these may be examples of working together, there are disconnective parts—areas where improvement might be made to better serve the students. Articulation, communication of new state programs and resources, an effective truancy prevention program, programs for at-risk

students, special education services, pupil services, and the provision of vocational training—all might be bolstered through better cooperation between the school districts.

Unfortunately, there are areas where a lack of cooperation exists, even though cooperation would be very beneficial. For example, school calendars are not aligned, causing excessive transportation and special education costs. There is a general unwillingness to coordinate bell schedules—a change that could further reduce transportation costs. Math articulation is a problem that has not been effectively addressed, among other issues.

Based on our interviews, some of the highest priority areas for better cooperation include:

- Common school calendars and coordinated bell schedules (for shared transportation)
- Curriculum articulation
- Tracking students and their records when transferring between school districts
- Delivery of special education services
- Programs for at-risk youths and truancy prevention
- After-school and remedial instructional programs
- Pupil services, such as counseling and health care

Key to any solution, as well, is the role of the Tuolumne County Office of Education (County Office) in helping to centralize certain services and facilitate districts to better working together. Relationships between some of the school districts and the County Office are poor, and yet if the existence of the small school model of organization is to be effective in Tuolumne County, then the County Office should lead, facilitate, and provide more services to the school districts. And school districts should cooperate with the County Office. Without this vital link, school districts are at risk of not keeping abreast of changes in state funding, programs, laws, and regulations.

This study does identify areas where better cooperation might improve service delivery. The means to better cooperation, though, are diverse and range from an informal sharing of resources to full unification of school districts into one or more K-12 systems. There are also options in between: joint powers agreements between agencies, merging two or more elementary districts, merging the two high school districts, and formation of one or more middle school or junior high campuses. Throughout our study, the citizens of Tuolumne County have openly expressed opinions on these options and how they might affect the educational programs in their community. Their opinions are an integral part of this report.

Selected Quotes

The following selected quotes were chosen for inclusion in this report because they reflect common themes SSC heard during the community and district meetings:

"This is a great school!"

"We live here for a reason and don't want to change."

"Ours is a community school."

"Unification is good for the educational program, staff mobility, facilities, and leadership."

"High schools take the lion's share of dollars (in a unification)."

"Bigger is not necessarily better."

"Unification is important for articulation, transportation, purchasing, and administration."

"Local control does not necessarily give superior access."

"There are too many superintendents and board members at too great a cost."

"If it is not broken, don't fix it!"—by far the most familiar refrain heard.

"We don't want to put kindergarteners on the same bus with 12th graders."

"The district is the focal point of the community."

"Unification will save money and keep taxes low."

"Maybe our schools should be smaller, not larger."

"Only way to get coordinated action is through unification."

"We want our kids in a small environment—that is why we live here."

"Unification brings us more money and that is good for the local economy."

The most popular options for working better together were the pooling of resources and unionizing or merging selected elementary school districts. While there was some support for a separate middle or junior high school campus, the majority of comments related to this option were overwhelmingly negative. And there are strong opinions on each side of the unification question. In our interviews, the school community—administrators, teachers, and parents—was in the majority opposed to unification. There were, however, good arguments made by some teachers and by a minority of parents in favor of unification.

"Better working together" takes varying degrees of effort and commitment depending on the option selected. SSC offers the following perspective:

Achieving successful results through informal cooperation, e.g., pooling of resources, is difficult. Coordination, leadership, and participation are hard to manage under volunteer circumstances. For example, if the goal is to have a single school calendar and one school site does not cooperate, then the goal of a single calendar is not met—two calendars might be better than 12, but not better than one. If the goal is articulation and key high school teachers do not attend the meetings, what are the elementary schools articulating to? If the County Office holds a staff development day for teachers and few districts participate, it is not economical to offer such programs. With informal arrangements, there is less certainty that cooperation will occur, continue, and be successful—but it is one option to better work together.

Formal cooperation, such as through Joint Powers Agreements (JPAs), is more likely to be successful. There are legal documents binding the parties legally, financially, and operationally; there is a separate controlling board (made up from district participants) to preside; professionals are hired to manage the operation; and the JPA is more directly accountable to the public. A JPA is another option to better work together.

Unionization (the merger of two or more school districts at the same grade level) and unification (the merger of two or more school districts into a K-12 system) demand cooperation. While differences of opinion within a single organization will certainly exist, there also exist overriding policies and procedures to help carry out the organization's goals. For example, there would be no question that all schools would have a single calendar, demands would be made to ensure high school teacher participation on articulation committees, and teachers would not have the option not to participate in planned staff development programs.

In SSC's opinion, unionizing and/or unifying school districts make a lot of sense from a practical standpoint. If the goal is to better work together, then a few larger organizations (instead of 12) most readily accomplishes this goal. And we believe the law promotes this type of reorganization. In the case of the proposal to unify Sonora High School District with its feeder elementary districts, there is no question in our mind that the state's nine criteria for unification are substantially met. Absent the potential legal quandary of all affected elementary school districts opting out of the proposal (under Education Code Section 35542(b)), SSC believes the SBE will approve the proposal and it will be placed on an election ballot within the coming year.

Are there disadvantages to unionizing and unifying from a local perspective? Yes, according to the majority of governing board members, administrators, teachers, classified staff, and parents that we interviewed. As reflected in the above quotes, there are concerns that the system replacing the existing system will not be better and may result in loss of identity, loss of access, creation of bureaucracies, reallocation of resources, elimination of programs, etc. Can any of these concerns occur? Yes, if the new governing board(s) allows. The new governing board(s) might also find more efficient and effective ways to do business. The bottom line is that the end result is an unknown until tried.

So who should make the decision to evaluate and select the services and options contained in this report? In theory, the entire community. Practically, the governing boards and their administrations may choose from any of the options and must participate in any pooling of resources option or a joint powers authority. The citizenry must participate in the unionization and unification options—both in the initiation and election. This is not SSC's decision to make. Rather, it is our hope that this report will motivate the school community to better work together in identified areas of need and help the public make an informed decision on important questions, such as school district consolidation.

Study Methodology

SSC's study methodology consisted of a series of meetings and review of key documents provided by the school districts and the County Office. Meetings were held at each school district and County Office. SSC met with administrators, board members, parents, principals, and teachers.

In addition, six community meetings were held in the following areas:

Sonora Opera Hall
Twain Harte American Legion Hall
East Sonora—Peaceful Valley Church
Groveland Community Hall
Jamestown-Tuolumne County Sheriff's Posse Grounds
Columbia Angelo's Hall
Tuolumne Memorial Hall

All told, SSC personally met with more than 200 individuals and reviewed written comments from dozens more. SSC also reviewed past studies, discussed points of law with the California Department of Education staff, and acquired data from other districts that are working better together.

The entire SSC team then conducted an overall analysis of the study results to: (1) summarize preliminary conclusions, (2) identify advantages and disadvantages of each option considered, (3) apply broadly the state's evaluation criteria to the most viable reorganization options, and (4) prepare this written report.

Study Scope

There are two major parts to the study. First, an assessment of educational service needs and second the identification of options for Tuolumne County schools to better work together.

Part I: Assessment of Educational Service Needs

In the assessment of educational service needs, SSC asked two questions:

1. What programs or services do the current school districts offer that are of particular success or benefit to our students?

2. What additional services are needed for students in our district and county?

In effect, SSC holds that programs and services that are noteworthy might be replicated and that areas of service need might be met with both objectives achieved by the school agencies "working better together."

Part II: Identification of Options for the Tuolumne County Schools to Work Together to Better Serve Their Students

SSC explored numerous possible organizational configurations ranging from unification and unionization to consolidations of administrative and governance systems. The direction of our exploration was based on input from the school districts and the community.

SSC understood that when it comes to analyzing boundary reorganization alternatives there is a pending petition to unify Sonora High School District with its seven elementary feeder districts. SSC also understands that some elementary school districts may wish to remain independent for elementary educational services, as permitted under the Thompson legislation (SB 1537, Chapter 1186, Statutes of 1994). These plans were also evaluated in our study along with the other options for the schools to better work together.

The selected options were analyzed from many perspectives to identify the impact on: (1) instructional delivery and articulation, (2) categorical services and special programs, (3) school operations, (4) pupil services, (5) personnel requirements, and (6) student housing.

In addition, SSC examined the various governance structures under each option. Of prime importance is the impact on community identity, "local control," and parental involvement.

Assessment of Educational Service Needs

The two service assessment questions were asked of all study participants: community members (at the public meeting and via a written questionnaire), school administrators, teachers, parents, and students. The following section summarizes our study results in this area.

What programs or services do the current school districts offer that are of particular success or benefit to our students?

There are many noteworthy areas where programs are working and the quality of educational services is high. The following list is by no means all-inclusive. The purpose of this study section is to highlight some of the best practices—that is, programs that should be emulated and not disbanded.

- **Reading Recovery:** There are many reading recovery programs in all of the elementary school districts. Sonora Elementary, Soulsbyville, and Jamestown made special mention of their programs. Curtis Creek, as well, has a good reading program called the Open Court Reading Program.

- **Gifted and Talented Program (GATE):** The County Office coordinates the GATE program and while there might be ways to expand the program, it is reportedly successful.

- **Transportation:** There is broad satisfaction with pupil transportation services in the county. People cited a high degree of driver professionalism and safety.

- **Field trips:** Many school agencies, e.g., Soulsbyville Elementary and Sonora High, have excellent field trip programs for every grade level.

- **Groundskeeping:** Belleview has used, with good experience, prison labor for part of its groundskeeping work.

- **Computer technology:** All districts make fairly good use of technology both in the classroom and in the office—some have excellent computer lab facilities.

- **Science programs:** Elementary in-class science projects, such as at Columbia and Sonora Elementary, were cited as successful.

- **Music, band, and arts programs:** Sonora High is known for its outstanding band program; all of the elementary districts have some form of music program, with some of the programs being outstanding. The Arts Reach to Schools program was also cited as a successful art program collaboration with a local non-profit agency.

- **Pupil services:** Soulsbyville and Twain Harte receive a mental health grant called Special Friends. This program is reportedly successful and might be emulated elsewhere. Also Miles of Smiles is a successful program. And the Wheels program for health services is a grant-type program that might be emulated.

- **Articulation:** Columbia uses a mentor teacher to work on articulation—this might be replicated elsewhere.

- **Community day schools:** Many, but not all, districts have a community day school to serve expelled students and those with disciplinary problems—this program should be expanded countywide.

- **Community partnerships:** Columbia has many partnerships with other community agencies, such as Columbia State Park, with an emphasis on School-to-Career learning.

- **Child nutrition:** All elementary districts offer a lunch program and most offer a breakfast program. For those not operating a breakfast program, there are start up grants available from the state.

What additional services are needed for students in our district and county?

A basic premise of this report is that there are opportunities for improving the quality of education and that these opportunities might be met by better working together as a school community. Thus, it is important to identify these opportunities. The following describes the most frequently cited areas for service expansion, areas where more cooperation is needed, and areas where the quality of the service could be improved (working better together or not).

Services Frequently Cited for Expansion

- **Counseling services:** The most frequently cited service that parents and teachers would like to expanded is counseling services—primarily family-type counseling. Very few counseling hours are available to students. After-school counseling, either individual or in a group setting, was repeatedly suggested. Some districts, such as Belleview, utilize community-based organizations and focus on students with severe problems. This model and others might be investigated for use.

- **Health services:** For many of the Tuolumne County school districts, the only health services provided on campus are those offered on a periodic basis by the County Office. Greater access to health services was identified as a need. Especially lacking in some schools are eye exams and dental evaluation.

- **Hourly supplemental instruction:** Most districts run summer school programs, but few offer the whole array of hourly and remedial programs. Most districts have fairly comprehensive remedial reading programs, but would like to expand into math, particularly in response to the state's new math standards. The new grade 7-8 Algebra

program should help in this regard. All of the elementary districts and also Big Oak Flat-Groveland have fewer than 333 pupils in grades 7-8, and so qualify for the higher funding rate of $4.65 per hour for the first 1,500 hours each year for this program.

- **After-school programs:** Similar to the hourly supplemental instructional programs described above, after-school programs are not widely used in Tuolumne County. Some agencies have no programs other than limited tutorial services.

- **Programs for at-risk youths:** There is a reported need for a more coordinated effort to identify students at risk of dropping out or not being promoted and then provide them with intervention services and alternative program placements. It becomes particularly challenging to the school districts when the students relocate around the county—that is, move from one district to the next. Each time a student moves to a new district, there are delays in the receipt and evaluation of that pupil's files. Students might be misplaced in a program and be at greater risk of failure. Thus, a more coordinated student information system is needed. Other services for these students and their parents might include family counseling, testing, and parent education.

- **Computer technology, online access and staff training:** While many districts have computer labs and good online capabilities, others could use new and additional equipment. Use of the state's one-time site dollars for computer equipment might be considered. Staff training needs can be met with the one-time district block grant dollars.

- **Libraries:** Library time is limited in many districts due to budget constraints. There is also no rotating book program in the county. Most districts do not have certificated librarians and have difficulty getting new materials catalogued and out on the shelf.

- **Electives:** Parents would like to see more electives, such as drama, art, and foreign languages, offered at the grade K-8 level. Some teachers expressed concern that the small middle schools on the current elementary campuses are unable to provide a sufficient number of electives and section offerings, such as a range of courses from remedial math to advanced topics in algebra and geometry. The suggested formation of a separate middle school was proposed to address course offerings.

- **Teacher staff development:** Both expansion and better coordination in the area of staff development is needed. There are some countywide programs offered, e.g., bringing in outside speakers and programs. However, not all school district staff are aware of or participate in the programs. Specific staff development training was requested in the area of dealing with problem children and difficult home situations.

- **Classified staff development:** Virtually non-existent, there is some coordinated bus driver training, custodial training, and business office training, but no coordinated training of instructional aides. It was suggested that a certificate program for instructional aides be developed countywide.

- **Substitute pool for classified staff:** Virtually non-existent, except for bus drivers in the Sonora High area. It is difficult for a small school to find a classified substitute.

- **Music, choral, and visual arts programs:** Many districts expressed a need to expand the music and choral programs (choral is virtually non-existent at the K-8 level). Other districts had admirable music programs. Sharing of music teachers might be a way to increase musical offerings. Visual arts teachers were cited as being needed—another opportunity for a shared position with another district.

- **Reduced class sizes:** Primarily limited by funding and facilities space, the need for more class-size reduction programs was noted.

- **Vocational training:** There is reportedly more demand for vocational type classes than is currently available and the demand starts in the middle grades. Both high school districts have programs that are small and expensive to operate.

- **Business services:** Many districts, because of small size, struggle in the business area. Recent conversion to a new accounting system, limited computer lines to the sites (in Chinese Camp's case), and the normal but high workload demands of the state all impact the small district's ability to keep up business reporting requirements.

- **Legal services:** There are no countywide legal services, as often found in other counties. A position could be created at the County Office or the services of other neighboring county counsels might be purchased. However since a county counsel's work tends to be more general in nature, districts will likely continue to contract with legal specialists for certain projects, such as labor negotiations. There are several legal JPAs in the state providing legal services on a countywide basis, with such programs operating through Alameda County, Kern County, and Sonoma County Offices of Education.

- **School Attendance Review Board (SARB):** The program currently has limited funding and access is not uniform throughout the county. More countywide truancy prevention programs are needed, as is the use of truancy officers. Some Tuolumne County school districts go directly to the district attorney's office and bypass the SARB process altogether. There should be a more systematic and responsive approach to deal with students with attendance problems.

Areas Where More Cooperation is Needed

There are several areas where more cooperation, in one form or another, is needed:

- **Common school calendars, countywide:** A common complaint is the lack of a common school calendar between the elementary and high school districts. Some effort was made to coordinate the schedules in 1999-00 among the Sonora High districts but some districts simply failed to cooperate. And there is no alignment with the County Office schedule for special education. This means unnecessary additional special education transportation costs are incurred when one district is out of session while the other is in session.

- **Curriculum and articulation:** Efforts have been made to hold joint meetings between the elementary and high school districts on articulation. The efforts require near 100% participation and cooperation in order to be successful, and this had not yet occurred. The

state's new standards in core curricular areas are helping to bring about alignment, but the standards will not be adopted in their entirety for several years. Math articulation with the high schools was cited as an area of particular need.

- **Grade level discussions at high schools:** Related to articulation are concerns raised from the elementary level about more horizontal communication between and within each high school grade level on curriculum. From that point, then articulation might be better achieved with the feeder elementary districts.

- **Use of textbooks:** Textbooks are not standardized throughout the county, so when a student moves to another district, the student is at a disadvantage because of textbook dissimilarities. Teachers raised this concern in several districts.

- **Tracking out-of-district transfers:** There is lack of timely coordination and communication when students move between districts. The students are sometimes lost in the system, and thus may be inappropriately placed for a period of time. Pupil records may not always to be up-to-date and/or transmittal to the new district may be delayed.

- **Extracurricular sports:** Better program coordination among elementary school districts was cited as a need. It was suggested, for example, that a sports circuit program be operated countywide that requires A & B team participation.

- **Special student programs:** Character development was an area cited as needed by students to address social and learning issues.

- **Grant writing:** Sonora Elementary has a part-time grant writer, as does the County Office, but many districts rely on teachers with the time, interest, and knowledge of the grant to pursue its application. A more coordinated countywide program might be put together.

- **School district administrator retention:** There has been a fairly high turnover among school district administrators. Reasons vary, but often relate to lower pay provided by small districts and the promise of career advancement by moving on to a larger district. One of the advantages of school district consolidation is the greater ability to attract and retain qualified administrators.

Areas Where Service Delivery Might be Improved

There were a few key areas that were repeatedly identified as needing improvement. These areas are:

- **Special education:** Special education services were recently shifted from the Calaveras County Office of Education back to the school districts due to administrative reorganization of the Special Education Local Plan Area (SELPA). High regard is held for the new special education administrator; however, there are some inherent problems with the system's size and make up which result in overwhelming criticism from district administrators and teachers. Specifically, students are not being grouped based on

disability, and teachers struggle to manage a diverse population of students with special needs.

On the one hand, having districts responsible for their own special education programs can lead to better integration between regular education and special education—essentially breaking the boundaries that sometimes occur between "our students" and "their students." But having a number of small districts operating their own programs can lead to fragmentation and the isolation of special education teachers.

A major study in itself, this issue is beyond the scope of the present study to respond to in detail. But two recommendations are: (1) the County Office should coordinate staff development programs for special education issues, and perhaps less formal meetings could also be held for special education teachers so they feel less isolated, and (2) a study should be made of ways the districts and County Office can work more cooperatively so that high-quality, effective special education programs can be operated in a more cost-effective manner.

- **County community schools and programs for at-risk youths:** Placement and services for at-risk youths do not appear well coordinated based on interview comments. The county community school program is essentially an independent study program, which some educators believe is not appropriate for students with serious behavioral problems. Most but not all of the districts have a community day school, which is good, but again lacks coordination with other programs. This is an area where the County Office might take a look at service access, delivery, and outcomes and make programmatic changes as needed.

- **County Office and school district relations:** The County Office serves four primary purposes:

  - One, to carry out the mandates of fiscal accountability by reviewing and certifying the financial condition of the school districts on a periodic basis.

  - Two, to provide specialized educational services to "hard-to-serve" pupils, such as juvenile hall and severely handicapped special education programs.

  - Three, to act as a conduit of information flow from the state to the local levels and between districts within the county. For example, identifying and then communicating information on funding sources, new program content, and the mechanics of setting up new programs.

  - Four, to act as a support net to small school districts. In a rural county such as Tuolumne, this last area might be the most important.

Our study results show that the County Office's role in all but the first area might be expanded. Absent major unification, the County Office could provide more curriculum support, pupil services, and business and operational services. However, will the customer,

i.e., the school district, be willing to purchase those services? We found that County Office/school district relationships are not generally positive, perhaps due in part to the heated unification discussions. However, real outreach on the part of the County Office might be helpful to all agencies. In fact, meetings are held without County Office participation or facilitation, which means that all districts may not be working together in a coordinated fashion—some might be left out of the discussion. SSC recommends that the County Office try to measure "customer satisfaction," survey unmet needs, and devise services to meet customer demand and expectations, given funding parameters.

Identification of Options for the Tuolumne County Schools to Work Together to Better Serve their Students

Service delivery can be provided in a variety of manners ranging from an informal pooling of resources to the entire reorganization of district boundaries, governance, and administration.

Since one of SSC's primary study objectives is to present a series of options for service improvement, we had to match the services identified in the first section of this report with the means to better work together. We did this in two manners. First, we prepared the following matrix that lists the most frequently cited service areas along with the options that are most likely to help the schools work together better in these areas. Second, we prepared an in-depth analysis of each option (e.g., advantages, disadvantages, and implementation issues) and discuss the application of each option in key service areas identified for improvement.

Matrix of Options to Better Work Together

The matrix shown on the following page lists out the major service areas and highlights the options for school districts to better work together. Note how many options are available in each service area. Also note that full unification (followed by unionization) necessitates "better working together," as the new district(s) must operate under single or consolidated policies and guidelines.

Pooling and Sharing of Resources

Description: An informal process of combining resources (e.g., funding, employees, equipment, facilities) from more than one agency to deliver or expand a needed service in a high quality, cost-effective manner. The types of services that could be provided through a shared arrangement are nearly limitless. A description of the services frequently cited as have greater potential if shared with other districts includes:

- **Nursing and health services:** Consider hiring an itinerant nurse or joining forces with local health agencies to provide services. There are some examples of this type of joint effort today in Tuolumne County and these examples might be emulated countywide. For example, Belleview is provided with mobile clinic services from a local hospital. Perhaps the greater health care community could take a more active and coordinated part in delivering basic diagnostic services on school district campuses.
- **Counseling services:** Identified as an area of high need, some districts, such as Summerville Elementary, benefit from local partnerships with practicing counselors to provide services. This program might be expanded and coordinated countywide.

Matrix of Options to Better Work Together

Services Identified in Study	Pooling and Sharing of Resources	Cooperative Service Agreements	Combining Administrative Services	Unionizing Two or More School Districts	Formation of a Middle or Junior High	Unifying Two or More School Districts
Educational and Pupil Services						
At-Risk Youth Programs	■	■	■	■	■	■
Class-size reduction				■	■	■
Computer technology	■	■		■	■	■
Core academic course expansion				■	■	■
Counseling Services	■	■		■	■	■
Curriculum articulation	■		■	■	■	■
Electives				■	■	■
Grant-writing	■		■	■		■
Hourly and after school programs	■	■	■	■	■	■
Library education and materials	■			■	■	■
Nursing/Health Services	■	■		■		■
Performing and visual arts	■			■	■	■
Pupil attendance improvement	■		■			■
School calendar	■		■	■		■
Special education		■	■			■
Sports and extracurricular activities	■		■		■	■
Student tracking database	■		■	■		■
Substitute pool – certificated	■		■	■		■
Substitute pool – classified	■		■	■		■
Textbook standardization	■		■	■	■	■
Vocational education	■	■		■	■	■
Employee Relations and Development						
Teacher staff development	■		■	■	■	■
Classified staff development	■		■	■	■	■
Recruitment				■	■	■
Promotion and assignment				■	■	■
Business and Operations						
Business services	■	■	■	■		■
Purchasing	■	■	■	■		■
Facilities management			■	■		■
Food services	■	■	■	■		■
Transportation	■	■	■	■		■
Maintenance/operational services	■		■	■		■
Board and Administrative Services						
Governing board			■	■		■
Superintendency			■	■		■
Assistant superintendency			■	■		■
Legal services		■	■	■		■

■ Reasonable options to achieve service goal.

- **Computer technology:** Computer labs are already being shared, but there may be an opportunity to put together a countywide technology plan, which would include installation and training programs. A support system could be operated either through the County Office or a consortium.

- **Hourly supplemental programs:** Programs for remedial instruction should be offered by all school districts, but it is sometimes not fiscally practical to provide the instruction for a few number of pupils. Neighboring districts might join forces to run remedial instruction programs, particularly during the summer (e.g., a reading academy), weekends, or during breaks. After-school programs are generally better suited for on-campus program delivery since the students are already on campus.

- **Summer school programs:** Summer school (a form of hourly supplemental programs) should be offered by all districts. Most districts do offer summer school, but a few do not. There is plenty of state money to run these programs and there is usually high public demand. Small districts—those with 499 or fewer pupils (or, for the grade 7-8 Algebra Program, districts with 332 or fewer pupils in grades 7-8)—receive $4.65 per hour for up to 1,500 hours (or a maximum of $6,980) in 2000-01 for each of the Core Academic Program, the K-4 Reading Program, and the Grade 7-8 Algebra Program. If several small districts joined forces, with each claiming up to $6,980 per program, there would be sufficient funding to operate a quality summer school program.

- **Transportation route coordination, maintenance, equipment, and fuel purchases:** Currently, there is limited bus route coordination and the trading of routes between school districts in Tuolumne County. And there is some sharing of maintenance, equipment, and purchases. For example, Summerville High permits Summerville Elementary staff to use its maintenance facility. Soulsbyville provides fuel for the Summerville area. Sonora High provides maintenance services and driver's training to seven school districts plus operates the special education transportation program. In sum, there is limited cooperation, and there are opportunities for more pooling of resources.

  Greater route consolidation would make the systems more efficient but requires the coordination of school calendars and bell schedules. Further consolidation of maintenance and joint purchases on equipment, supplies, and fuel could help streamline costs. SSC believes there are ways to work better together in the area of transportation and run a more efficient system (see also the discussion under the next option, joint powers agreements).

- **Textbook adoption:** The County Office might coordinate a "publisher's show" as was done in previous years to assist districts in their textbook adoption. School districts may want to move towards more uniformity in textbook adoption to ease the transition for students that move between districts in mid-year.

- **Vocational and regional occupational programs:** Vocational classes are expensive to operate. Classroom space must usually be dedicated for the entire day even if used only part of the day, equipment is often specialized and expensive to purchase and maintain,

and instructors are difficult to recruit and retain. However, vocational training is an important option for students, especially those not inclined to continue on to higher education.

Both of the Tuolumne County high school districts offer vocational classes and admit they are expensive programs. Sharing of classes would be a means to reduce the cost per pupil and offer more different types of classes. But there are only a few students today who take classes in the district other than their residence due to the distances involved and scheduling conflicts. Sonora High and Summerville High have two very different schedules that create a barrier to sharing vocational and regional occupation program classes. Sonora High is on a traditional six-period schedule with an optional elective period. Summerville High is on a four period rotating block schedule that allows five core courses and three electives. The two districts may want to align their schedules and encourage the expansion and sharing of vocational programs. See the next option, joint powers agreements, for more ideas on sharing of vocational programs.

- **Food program purchases:** School districts might consolidate the bid for frequently used food purchases in order to obtain the best price.

- **Teacher substitute pools:** The County Office has a teacher substitute pool and calling system, but only a few districts are using the service. It is reported that the service is more economical than district services that hire individual employees. This service is a good candidate for expansion to serve all districts.

- **Shared superintendents:** Informally Soulsbyville, Columbia, and Sonora Elementary provide superintendent back up when one is away from the district for extended periods. Others may have similar arrangement or consider adoption of this model. In addition to leave backup, some districts in the state share a superintendent—this option is discussed later under Cooperative Agreements.

- **Classified substitute pools:** Consider the establishment of a countywide substitute pool for classified service, such as bus drivers, custodians, food service workers, clerical staff, instructional aides, and maintenance workers.

- **The college connection:** Continue to tap into joint programs with local colleges in areas of advanced placement courses, electives, and recreational programs. Chinese Camp is doing some joint projects with Columbia College and more examples, countywide, probably exist.

- **Grant writing:** Some work in this area is being led today by the County Office with good results, but there may be more opportunities that are missed for individual districts. Consider pooling staff, perhaps through the County Office, to seek new revenue sources and write grants. Write the grants to include a number of school districts.

- **Maintenance trades:** Small schools must contract out for specialized maintenance trade work, e.g., heating and air conditioning, locksmith, and some electrical. And overall the service is reported to be good. However, there may be opportunities to have a shared position and rotate the tradesperson among several districts or consolidate the service contracts to obtain a better quote.

- **School attendance:** There are a several areas in student attendance where the districts and county might better work together:

  - Development of a common countywide student information system to better track pupil attendance when students move within the county.

  - School districts could take more advantage in accessing the school attendance review board (SARB). This County Office-coordinated process works with other local agencies such as law enforcement and social services, and is designed to return students to the classroom.

  - Hire truancy officers or establish a couple of positions within the police and/or sheriff's department. Consider funding for these positions through a program of truancy ticket collection. By local ordinance, city or county officers have the ability to write a ticket for students caught truant. The fine typically ranges from $50 to $250 per incidence and allows for community service work in lieu of the fine. This program has been successfully used in other parts of the state.

- **Curriculum articulation:** Expand the efforts of the articulation group meetings to include representatives from all districts within each high school attendance area and key teachers/department heads from the high school. Governing boards must commit, as well, to adopting the framework that will allow for better articulation and meet high local program standards.

What are the Potential Advantages of Pooling and Sharing of Resources?

1. Economies of scale can be achieved, e.g., more students served, more classes offered, more economical operation, etc.

2. Does not change the basic make up of the school agency, e.g., its governance and educational philosophy.

3. Does not require state or local approvals—only governing board or superintendent action.

4. No lengthy timelines; the program can be put together quickly compared to other options.

5. Prime candidate for a quick fix or temporary solution.

What are the Potential Disadvantages of Pooling and Sharing of Resources?

1. It takes leadership and "stick-to-it-ness" to make it work.
2. Seen as voluntary; other more immediate jobs tend to take priority.
3. Seen as a good idea, but too much work.

How is this Option Accomplished?

Basic requirements essential for the successful pooling or sharing of resources include:

- Leadership to initiate the program of shared service
- Day-to-day management of the program
- Monitoring of service delivery quality
- High level of participation in the program from all affected school agencies
- Monitoring the cost/benefits of the program over other service delivery options

Cooperative Services or Joint Powers Agreements (JPAs)

Description: Formalized agreements between school agencies to provide specified services in a collaborative manner. Typically a separate legal entity is created with a governing board that is comprised of members of the participating school agencies. Bylaws determine the financial and operational direction for the JPA. There are numerous areas where a cooperative service agreement or JPA might be established. The single largest opportunity is in transportation. This report describes in more detail below the advantages of a transportation JPA (SSC is convinced that serious consideration should be given to this option). Other opportunities also exist and are listed here as well:

- **Business services:** A shared business manager or a county-operated small school district business office could be established through a cooperative services agreement. Ventura County Office of Education has a separate small school district business office set up and SSC recommends that the Tuolumne County Office of Education consider a similar model. Alternatively, a larger school district might expand its business services to accommodate more of the small districts. This type of shared arrangement is currently in place with Sonora High, Summerville High, and their feeder districts, but there are more opportunities available for consideration.

- **Running hourly programs of remedial and enrichment:** Statewide there are six hourly type programs that can be held before school, after school, on weekends, and during the summer. Because not all districts are taking advantage of these programs and some of the programs provide more funding per pupil hour to small districts, a cooperative services agreement in this area might be beneficial—both financially and educationally.

- **Regionalized County Office services:** The County Office is looking at more regionalized county services, for example joining forces with Amador, Calaveras, or Stanislaus counties. There was a regionalized special education program that is now defunct. Ideas for regionalized services include data processing, legal services, grant writing, etc.

- **Vocational education or Regional Occupational Center/Program (ROC/P):** Both Summerville High and Sonora High participate in the Stanislaus County ROC/P consortium. But the consortium primarily acts as a funding mechanism by allocating state dollars to participating school districts based on pupils served. There are no real economies of scale in the operations of the program since both Tuolumne County school districts provide their own separate programs. In recent years, the Tuolumne County districts have also not tapped into all of the dollars available for program growth—a missed opportunity if a viable class offering can be developed.

  It is difficult to provide a full vocational education program at each of the two Tuolumne County high schools. There are issues related to facilities space, the high cost of equipment, and the low number of participating students, especially at Sonora High where students have fewer elective periods. However, vocational education is an important option for the student who might not be college-bound. Formation of a JPA between the two high schools, either inside or outside the current ROC/P consortium, might be considered with a single vocation training facility.

  Several issues must be addressed in forming the JPA:

  1. **Location of the facility:** If the goal is to construct a separate vocational training center, then neither high school district currently has the space. But Summerville High may be able to dedicate space as part of its current expansion and Sonora High owns a parcel of land that is in a good location and might be used to construct such a facility.

  2. **Financing for the facility:** Construction funds would need to be provided through a combination of state and local sources. Alternatively, certificates of participation (a lease financing option) might be used if the program can support the debt service requirement.

  3. **Program funding:** The JPA should be self-supporting, meaning that the state pays for all of the operational costs of the program through the ROC/P revenue limit.

  4. **Transportation:** Ideally, but not required, transportation should be provided. This means several added bus routes that would need to be funded by the program.

The benefits of a single vocational education facility and program, operated under a JPA, include the ability to offer more classes, potentially attract higher attendance from the adult population, hire specialized instructors, and provide a more visible school-to-career track for interested students.

- **Transportation JPA:** Formation of a transportation joint powers agreement (JPA) between some or all Tuolumne County school districts has been discussed in the past. In 1994, a transportation study was conducted that examined the potential cost savings by operating a consolidated transportation system for eight of the 12 districts: Sonora High, Sonora Elementary, Curtis Creek, Chinese Camp, Jamestown, Soulsbyville, Summerville High and Big Oak Flat-Groveland. The study concluded "slight improvements in their (the districts) overall cost" and that "very few (districts) can make significant reductions in their general fund contributions."

  However, the study did not attempt to quantify the savings and did not fully describe the cost characteristics associated with misaligned school calendars and bell schedules. It is SSC's opinion that if a more in-depth analysis of the potential cost savings was made as a result of coordinating school calendars and bell schedules, then the conclusions might be more supportive of a JPA. Another cost characteristic not analyzed by the study is transporting pupils of all ages on the same buses—an area of hot debate but of importance to the analysis as it too would yield savings.

  Currently, all school districts in Tuolumne County provide transportation. Regular home-to-school transportation is not mandated by the State of California. It is an optional public service and one that is underfunded by the state, which means that school districts must use regular education dollars to fully pay for transportation. If these dollars were not being used to fund transportation, they could be used for other educational purposes.

  There are, however, benefits of providing transportation, such as helping to improve student attendance, providing a generally safer mode of transportation for students, and providing convenience for parents. In order to balance the benefits with the cost, school districts are obligated to run a program that is both of high quality and high efficiency. It appears that most programs are of high quality, but that greater efficiency can be achieved.

  Today, Sonora High is providing maintenance and some bus driver training to eight school districts: Sonora High, Twain Harte, Chinese Camp, Jamestown, Sonora Elementary, Curtis Creek, Belleview, and Soulsbyville. Thus, maintenance for these districts is more efficient than if maintenance was handled individually at each school district. Summerville High and Elementary share mechanical services and, therefore, achieve some efficiency in this area.

  Columbia and Big Oak Flat-Groveland, however, are completely autonomous. It makes sense that Big Oak Flat-Groveland is autonomous due to geographical isolation, but Columbia could opt into the Sonora High program. Columbia has a high level of

transportation funding compared to other districts and is able to cover its costs, but any added savings might be used to improve the maintenance facility or to add more services.

In SSC's interviews with transportation employees, a common viewpoint was that the current system is efficient overall. Buses are running nearly full with children, routes are mapped out in the most efficient manner. It was conceded that a few routes might be consolidated and there could be a better sharing of substitute bus drivers—but overall they are doing the best that can be done with the current system. And that is the key—the current system. In our opinion, if a different system were in place, then opportunities for greater efficiency would arise.

For example, individual drivers are running only one to two routes. If they ran three routes, for example, time would be saved inspecting the buses, as there would be fewer buses in service. Travel time to physically get out to the neighborhoods would also be saved.

Special education transportation is another area where efficiencies might be achieved. Transportation for special education is consolidated and operated by Sonora High. But, despite the consolidated management, the school calendars are not in alignment. For example, when one district is not on spring break while the others are, then routes to the one district must be made—low ridership and bus driver time make this inefficient. Curtis Creek's calendar, in particular, is not in alignment and thus had increased special education transportation costs. SSC suggests that any misalignment be corrected for the 2000-01 school year.

Transportation costs per ADA (i.e., students in attendance) are significantly higher than the statewide average, as shown by the following table:

	Transportation Cost per ADA
Chinese Camp	$852.19
Sonora High	656.39
Columbia	580.28
Belleview	372.46
Sonora Elementary	311.06
Twain Harte	234.35
Curtis Creek	234.26
Summerville	233.06
All Unified Statewide Average	***190.57***
Soulsbyville	179.67
Jamestown	161.88
All High School Statewide Average	***155.91***
All Elementary Statewide Average	***119.11***

Source: 1998-99 State J-380 report
Note: Big Oak Flat-Groveland and Summerville High did not report this year.

The rural geography plays a role in driving the cost up per pupil, but we also found the cost per mile high in many elementary districts. Belleview, Sonora, and Columbia all reported to the state a cost per mile that exceed $5—the statewide average is in the $3 range.

Forming a Joint Powers Agency (JPA) to run the transportation program and/or contracting out for transportation services to a private provider are two options probably worth exploring one more time. An advantage of a JPA is that there is potential for it to be professionally managed and adopt high standards of performance and operations, including standards for bus routing, driver training, bus maintenance, bus replacement, and student discipline.

There are several transportation JPAs in the state that have been successful: Antelope Valley Schools Transportation Agency in Lancaster, Mid-Placer Public Schools Transportation Agency in Auburn, Pupil Transportation Cooperative in Whittier, Southwest Transportation Agency in Riverdale, and the West County Transportation Agency in Sebastopol. Also the Lemoore area schools (including Lemoore High, Lemoore Elementary, Island Elementary, and Central Union) have a transportation cooperative.

SSC spoke with representatives from transportation JPAs and found the programs to be very successful. The Mid-Placer JPA has no encroachment whatsoever, meaning the program is wholly self-supporting and was able financially, out-of-state transportation funding, to construct and pay for a transportation facility using certificates of participation. This program also operates with grades K-12 on the same buses without problems—a concern expressed in Tuolumne.

Other positive benefits of forming a transportation JPA include:

1. Improvement in the bus fleet. Fewer buses would be needed so only the best would be kept. The buses could continue to be technically owned by the districts in order to participate in the state's small school district bus replacement program.

2. Improvement in bus driver training. With a large number of drivers working for one agency, a rigorous and scheduled training program could be developed (or expanded from the existing Sonora High model).

3. Bus safety would improve with better buses and driver training.

4. School site administrators do not have to be troubled to find bus driver replacements or arrange for loaner buses.

However, in our interviews there were many concerns about a transportation JPA that came from parents and district staff. Their points of concern were:

1. Time spent on the bus might increase.

2. More campus supervision time might be required as students wait for buses to arrive.

3. Loss of good student/driver rapport.

4. Discipline problems with elementary-age pupils riding on the same bus with high school-age pupils.

5. Loss of bus driver jobs.

6. Loss of timely access to transportation, e.g., in case of an emergency evacuation.

SSC believes that if a transportation JPA is properly set up and managed (and there are tools, models, and talented managers locally to assist), each of these concerns can be eliminated. Specifically:

1. Time spent on the bus would not increase as the routes would remain the same. Time might even decrease as routes are made more efficient.

2. Buses would run to meet a coordinated (not necessarily the same) bell schedule and there would not be more campus supervision time nor pupils waiting longer on campus.

3. Bus drivers would be assigned stable routes and would thus be able to develop good rapport with parents and students.

4. Today, Sonora High and Sonora Elementary share a few routes and special education transports for all grade levels of pupils. This local experience, according to the transportation department, and also the experience of the Mid-Placer JPA, has shown that bus discipline actually improves when elementary pupils are bused with high school pupils. It was reported that high school students are generally quieter than elementary students and understand they must behave when younger students are on the bus, middle school students are quieter knowing that older students are on the bus, and siblings and neighbor children are among those riding together—they look out for each other.

5. No immediate loss of jobs would have to occur. As the efficiencies in routing are gained, reduction in the number of drivers could be accomplished through attrition—that is, through retirements, reassignments, and turnover. The average pay for bus drivers is about the same countywide. Sonora High pays approximately $16 per hour—most districts pay in the range between $13 and $17

per hour. For the individual drivers, there may be an opportunity for slightly better pay in a JPA.

6. Emergency plans could be developed to include a timely evacuation response plan. In fact, a JPA would probably provide a more coordinated effort response in case of emergency.

A countywide JPA (excluding Big Oak Flat-Groveland, which is geographically isolated) would be the most efficient. Routing and bus deployment would occur in two primary regions: Summerville High area and Sonora High area. Buses would need to be parked at remote locations—close to the neighborhood served. But maintenance could be centralized in one location. Sonora High is currently investigating the expansion of its maintenance facility.

Absent a countywide JPA, a JPA could be formed for each high school attendance area or between any two or more districts.

Absolutely key to a successful and efficient transportation JPA is the alignment of bell schedules and school calendars. Without alignment of the bell schedules and school calendars, fewer efficiencies could be derived. This alignment could occur through cooperation, but the past track record in this area has not been completely successful. Unification would certainly eliminate this problem.

- **Purchasing cooperative:** At present the County Office does an annual supplies bid and some districts coordinate bids with each other on an informal basis. A cooperative of school districts, which could include the County Office, may be considered as a cost-savings device for the purpose of purchasing supplies, equipment, and textbooks. The co-op would have a price advantage because the quantities ordered would be larger. A co-op could also run a central warehouse and delivery system, but most districts are moving away from this concept and adopting inventory-less systems of direct delivery. Direct delivery may cost more, but saves inventory holding costs and speeds the time of delivery. Another advantage of a co-op is the ability to hire trained professional buyers.

- **Food Service cooperative:** Unified school districts and larger elementary districts save money by operating centralized kitchens and transporting the food, under safe conditions, to schoolsites. This eliminates the need for numerous kitchen set-ups. If managed properly, construction of a centralized kitchen could be financed through certificates of participation and repaid by food service proceeds, as successfully accomplished by San Bernardino Unified School District. School sites would then only have a limited number of staff, primarily servers. A food service cooperative would be a vehicle for such an operation. There must, however, be careful consideration given to the cost of program operations. That is, unless the program is wholly self-supporting, it is probably not viable. Today, about half of the programs in the county today are not self-supporting, so an opportunity for improvement exists. Establishment of a food service cooperative also takes keen management skills. At issue, beyond the finances, is the quality of the food.

Unless the food is of as high a quality as the food served today, the concept is not likely to be accepted.

- **Common administration and governing boards:** Some districts, such as Santa Barbara City Schools, Santa Rosa City Schools, Point Arena Schools, and Modesto City Schools, have a common administrative structure, including a common governing board, but retain separate legal status. Separate budgets are kept and separate reports are filed with the state. However, some have consolidated their reporting. The effect is to act like a unified district without unification. However, with the recent provisions of law that allow elementary feeder districts, unwilling to unify, to opt out, these common administrative structures make less sense than unifying. Why not unify—and receive the additional funding associated with unification—if you are acting like a unified district? The advantage of this model is in the economies of scale for shared services and the ability to recruit and retain employees with specialized skills. The disadvantage is that some duplicative work, such as two state reports, remains.

- **Common administration and separate governing boards:** Some districts share administrative services (e.g., the superintendent and business services) but retain separate governing boards. The advantage is to achieve economies of scale for those shared services and be able to recruit and retain employees with specialized skill. For example, Las Lomitas Elementary School District and Menlo Park City Elementary School District share all administrative positions except for the superintendent. Some other districts also share a superintendent. At present, Sonora High and Summerville High provide some business support services to other districts; however, this is not on a scale comparable to Las Lomitas and Menlo Park. The disadvantage is that duplicative work still exists, so the question is why not unionize or unify to achieve even greater efficiencies?

What are the Potential Advantages of Cooperative Services and JPAs?

1. Economies of scale can be achieved which means:

   - Spreading fixed costs over a larger base of expenditures.

   - A greater amount of equipment, buses, etc., to deploy and use as backup, and the ability to be more responsive.

   - Ability to consolidate operational delivery.

2. Greater ability to recruit and retain skilled managers and provide more staff training in the specialized area.

3. Does not change the basic make up of the school agency, e.g., its governance and educational philosophy.

4. Does not require state or local approvals—only a governing board or Superintendent action.

5. No lengthy timelines; the program can be put together quickly compared to other options.

What are the Potential Disadvantages to Cooperative Services and JPAs?

1. Requires broad commitment, leadership, and expertise.

2. Employee issues related to lay-off from existing district jobs and the potential for rehire in the new JPA. Concerns about salary and benefits being comparable will exist unless there are protections written into the JPA bylaws.

3. Requires calendar coordination (and even bell schedules) for cooperatives such as food service and transportation to operate at peak efficiency.

4. There are start-up costs associated with feasibility studies, legal contracts, and management functions. Also startup costs can be substantial if a new centralized facility is needed.

How is this Option Accomplished?

Joint Powers Agreements are authorized by Government Code Sections 6500 et seq. that allow government agencies to form separate agencies to provide a common service. The powers of the agencies are spelled out in the JPA. Formation of a JPA is the legal vehicle for this cooperative option, but establishing the operations of the JPA requires expertise and dedication. It should not be undertaken without the benefit of a feasibility study. In the area of transportation, circumstances have changed since the 1994 study and not all districts were included in the study. If a transportation JPA is considered, SSC would recommend that a new study be conducted in adjunct with the work prepared for this report.

Once there is justification to proceed in establishing a JPA, the following activities would occur (not in any specific order):

- Formulation of timelines and duties
- Engage legal counsel
- Pool relevant finances and assets of participating districts
- Acquire insurance
- Establish employment terms, e.g., salaries and benefits, union versus non-union
- Determining how participating districts will be charged for services
- Configuring operational setups and delivery systems
- Addressing facilities issues
- Cooperation!

Unionizing Two or More School Districts

Description: Unionization is the consolidation of two or more school districts at the same grade levels—elementary or high school. Technically, one school district is the "survivor," but a new election could be called to vote in a governing board that represents the newly unionized district. The new board might also agree to a district name that better describes the merged territory over the name of the "surviving" district. However, salary schedules and employee contracts of the "surviving" district would not be interrupted, unless negotiated by the new board.

There are many configurations of unionization at the elementary levels that might be worthy of further consideration, for example:

- Summerville Elementary with Twain Harte
- Summerville Elementary, Soulsbyville, and Twain Harte
- Soulsbyville, Belleview, Jamestown, Chinese Camp, and Twain Harte
- Columbia, Sonora Elementary, Jamestown, and Chinese Camp
- Soulsbyville, Belleview, and Curtis Creek

One of the most obvious configurations worthy of study is Jamestown with Chinese Camp. Jamestown already serves the grade 7-8 Chinese Camp pupils and shares programs such as Peer Assistance and Review, food services, and substitute bus drivers. The Chinese Camp School could then, if the governing board desired, be reconfigured into a grades K-3 school. Presently, Chinese Camp struggles to teach to state standards when there are several grade levels in the room—however, there is a high level of educational accountability and the district has won distinguished school status.

The following table shows the estimated enrollment if all of the elementary school districts unionize into two school districts.

Unionization Options—Example of Estimated Student Enrollment	
Columbia	519
Sonora Elementary	842
Jamestown	511
Chinese Camp	33
Total Enrollment	**1,905**
Curtis Creek	803
Belleview	235
Soulsbyville	632
Summerville Elementary	472
Twain Harte	703
Total Enrollment	**2,845**

A merger of the two high school districts, Sonora and Summerville, would create a 2,600-pupil district.

What are the Potential Advantages of Unionizing Two or More School Districts?

1. Greater facilities flexibility. For example, today both Jamestown and Sonora Elementary school sites are impacted with students beyond capacity and without land to expand. Unionization in some form may enable a larger district to redraw attendance boundaries based on space considerations and justify the development of a new site through increased enrollment.

2. Build a better middle school program with increased enrollment and available course offerings and electives.

3. Added revenues to "level up" the differences in the average salaries and benefits.

4. Better deployment of administrators is likely to occur. Instead of "wearing too many hats," as is currently the case, administrators could focus on their areas of expertise, e.g., personnel, business, curriculum, pupil services, facilities, etc. The larger district would have a greater ability to attract and retain qualified administrators.

5. Keeps dollars and educational focus at the K-8 level without competition from the secondary programs.

6. Consistency in policy-making, for example policies for field trips, sports participation, and grade level articulation.

7. Ability to develop magnet schools.

8. Vocational training consolidation of the current two high school district programs into one would likely be more cost efficient and allow for more program offerings with more students. Student schedules would need to be coordinated by the newly reorganized district.

9. More stable educational program, that is:

    - Less subject to political winds or, as some interviewees termed it, micromanagement by the governing board

    - Not as dependent on a single teacher to run the program. For example today when the only 8th grade science teacher leaves, the program's continuity and quality is dependent on finding a suitable replacement. In a larger district, there would be more credentialed science teachers to carry out program goals.

10. Better able to handle students in transition in a single system. Thus, when students change schools they would not change districts, change textbooks, and need to be reevaluated for program placement.

11. Eliminate duplicative costs incurred for: board stipends and benefits, preparation of multiple state reports, and the maintenance of separate books, time spent "reinventing the wheel," e.g., developing procedures and forms, planning activities like staff development, keeping abreast and responding to changes in laws and funding, shopping the best price on supplies, etc.

12. Positive effects on employees include:

    - Increased pay for those on the lower salary schedule(s)
    - More advancement opportunities
    - Ability to transfer to other school sites and programs without diminution in pay
    - More staff development and peer group interaction opportunities
    - Greater bargaining power with increased size of the unit

What are the Potential Disadvantages of Unionizing Two or More School Districts?

1. Potential negatives for staff include:

    - An employee could be transferred to another site without the employee's agreement. Concerns were expressed that a particular school site might become the "dumping ground" for problem staff.

    - Employees on the higher salary schedule could be Y-rated, that is held at that pay level, if the state's dollars are insufficient to cover the costs of leveling up to the highest salary schedule.

    - Unlike in a unification, classified staff do not have a legal right to their job or current pay for two years; in other words lay-offs are permissible at the governing board's discretion.

2. Less direct access to superintendent and governing board.

3. Reported concerns: Twain Harte-Long Barn UESD has had fiscal problems and there are concerns about merging with a district that has fiscal problems. And a majority expressed "they are happy with their schools as is."

How is this Option Accomplished?

Through a territory transfer that is initiated either by all of the affected governing boards or by a citizen's petition of 10% of the registered voters in any of the districts to be reorganized (ref. Education Code Section 35721). Chart 1 illustrates the various steps in a territory transfer. This process typically takes one to two years, is handled at the county level (unless appealed to the state), and requires an election.

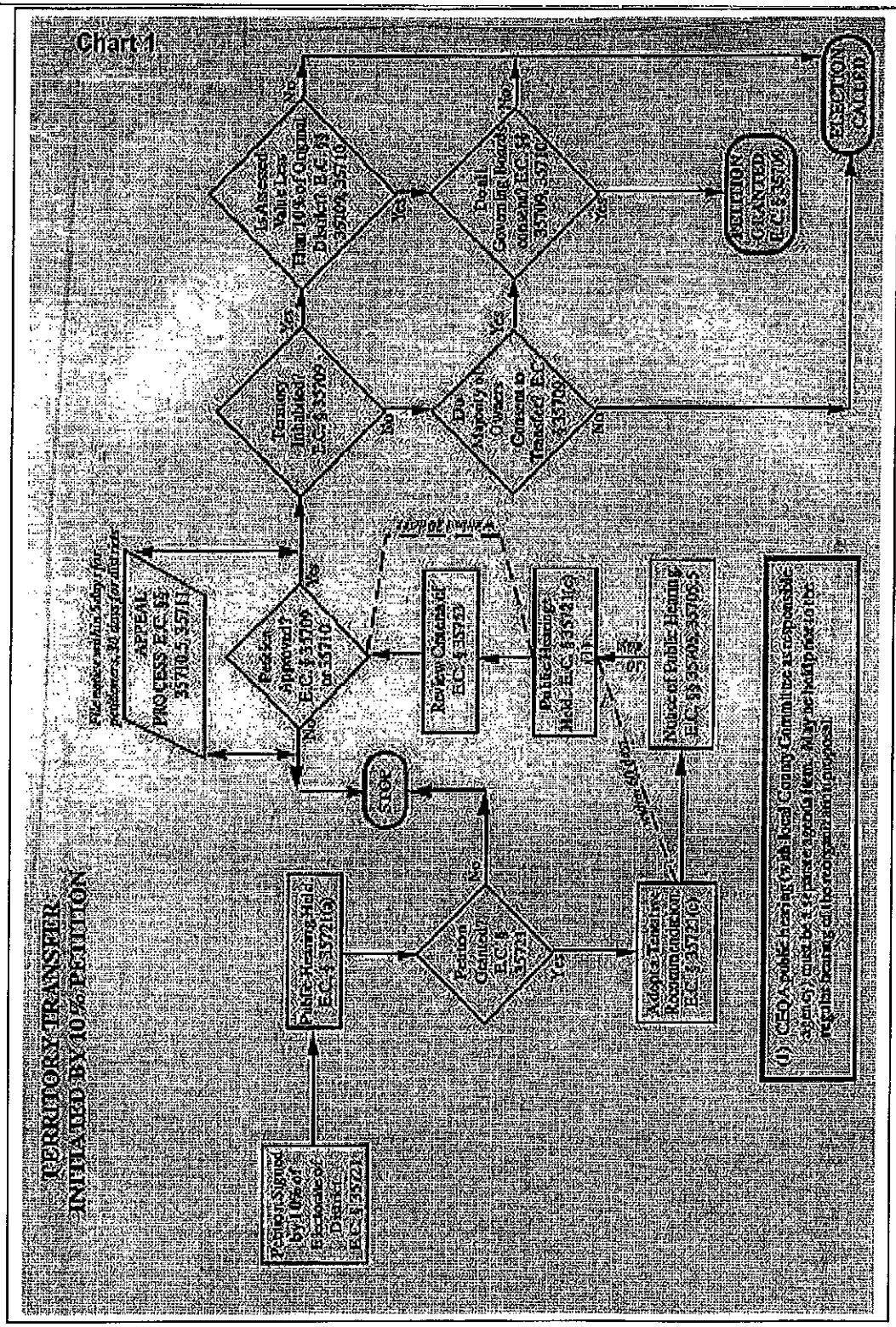


Chart 1
TERRITORY TRANSFER
INITIATED BY 10% PETITION

Establishment of a Separate Middle School or Junior High Campus

Description: Forming a separate campus or campuses for middle school students, i.e., grades 6-8, either by unionizing two or more elementary districts, unifying into a K-12 system, or through a joint powers agreement. Or forming a separate campus or campuses for junior high students, i.e., grades 7-9, by transferring the grade 7-8 students to the high school districts for their education.

At present, the elementary K-8 districts set aside space alongside the grade K-5 classrooms to serve the middle school students. This setting aside of space provides a means to separate the older children from the younger, even though they are technically housed on the same campus. This option would establish one or, preferably, two wholly self-contained campuses. The configuration might look as follows if the elementary districts were to develop two middle school campuses.

Estimated Grade 6-8 Enrollment at Two Proposed Middle School Campuses	
Columbia	153
Sonora Elementary	294
Jamestown	159
Chinese Camp	
Total Grade 6-8 Enrollment	**606**
Curtis Creek	319
Belleview	87
Soulsbyville	249
Summerville Elementary	158
Twain Harte	261
Total Grade 6-8 Enrollment	**1074**

An alternative configuration would be two junior high campuses serving grades 7-9, instead of grades 6-8. That means that the elementary school districts would serve grades K-6 and the high school campuses would house grades 10-12.

What are the Potential Advantages of a Middle School or Junior High Campus?

1. **Education program offerings:** With the increased enrollment, there would be an increase in the potential electives and course sections that could be offered. A broader range of classes could be offered in core subject areas (e.g., remedial math through Algebra II) over what is currently offered. It would allow pupils to "rise to their highest capable level," said one teacher.

2. **Articulation:** The transition to high school, from a curriculum viewpoint, might be improved. Even though school districts must teach to state standards, there could still be a wide array of instructional materials used. There may be some benefit from uniformity of materials used towards better articulation.

3. **Teacher staffing:** Ability to attract and retain teachers with specialized credentials would increase because of the broader range of course offerings.

4. **Sports and after school programs:** By operating one or two middle school or junior high campuses, a sufficient number of interested students would be available to provide better sports and other after-school programs. The current grade 6-8 enrollments at some sites are too small to effectively provide such programs.

5. **Bridge the transition to high school:** Some report that a middle or junior high school might help to bridge the transition to high school both socially and educationally. Children like to associate with their peers and middle/junior high school is viewed as an important step in the transition from childhood towards teen years and then adulthood. Educationally, a common middle/junior high school would be an opportunity to meld the curriculum for articulation in preparation for high school.

What are the Potential Disadvantages of a Middle or Junior High School?

1. **Electives and extracurricular activities:** Participation in certain programs, such as music and sports, may decrease because there "are only so many slots available." Thus, instead of up to nine marching bands or basketball teams, there would only be one or two. Competition to participate would increase. Intramural sports, or A and B teams, could help mitigate the loss of participation.

2. **Reported concerns:** Some parents and teachers expressed concerns about children "growing up too fast" and that establishment of a separate campus, away from the younger children, would accelerate that growth. Concerns about campus safety and pupil discipline were expressed.

3. **Loss of cross-age tutoring:** A positive aspect of housing older children on a campus with younger children is that the older children often help out the younger children. SSC observed that many schools have cross-age tutoring programs whereby the grade 6-8 students assist the K-5 students. This would be lost if a middle/junior high school campus was built.

4. **Transportation:** Transportation costs would rise since pupils would be bused to a new campus. There may be a partial offset in costs due to the reduction of elementary routes. The time spent on the bus may also increase since children are bused from a larger geographical area.

5. **School sites:** Establishing one or two middle/junior high school campuses would require either: (1) the conversion of one or two existing K-8 schools into middle/junior high schools, or (2) the building of a new middle/junior high school. Option (1) would require the reassignment of the displaced K-5 or K-6 pupils to other schools, while option (2) would probably be financially difficult or impossible to achieve. Agreeing on which school(s) to convert to a middle/junior high school would certainly be controversial.

How is this Option Accomplished?

There are three primary means in which establishment of a separate middle school campus might be accomplished and two involve reorganization of school district boundaries. One is through the merger of two or more elementary school districts and the second is through unification into a grade K-12 school system. A third option is to form a joint powers agreement with several elementary school districts to run a common middle school.

To establish a junior high school in a high school district, a petition must be initiated either by all of the affected school district governing boards or by 35% of the registered voters in the high school district. Neither the County Office nor the SBE are involved in approving the transfer. Once the petition is validated, the election is called.

Unifying Two or More School Districts

Description: Unification is the merging of one or more elementary school districts with one or more high school districts. The resulting district is configured in grades K-12. A Thompson-style unification is one that excludes, with the approval of the SBE, one or more of the feeder elementary school districts from the unification action. Note that high school districts do not have the opt-out provision of law. There are several unification configurations that are reasonable candidates for consideration in Tuolumne County. They are:

- Sonora High School District with its feeder elementary districts

Unification Proposal Along Sonora High Boundaries	
Belleview	235
Chinese Camp	33
Columbia	519
Curtis Creek	803
Jamestown	511
Sonora Elementary	842
Sonora High	1,773
Soulsbyville	632
Total Enrollment	**5,348**

- Summerville High School District with its feeder elementary districts

Unification Option for Summerville High Boundaries	
Summerville Elementary	472
Summerville High	825
Twain Harte	703
Total Enrollment	**2,000**

- Tuolumne County with all school districts, including Big Oak Flat-Groveland Unified

Countywide Unification	
Belleview	235
Big Oak Flat-Groveland	654
Chinese Camp	33
Columbia	519
Curtis Creek	803
Jamestown	511
Sonora Elementary	842
Sonora High	1,773
Soulsbyville	632
Summerville Elementary	472
Summerville High	825
Twain Harte	703
County Office	77
Total Enrollment	**8,079**

Additional Revenue Limit Funding

Any form of school district reorganization—unification, unionization, or even territory transfers—triggers the calculation of a base revenue limit for the newly formed district. As discussed in detail in Appendix D, this calculation consists of two parts:

(1) The blending of base revenue limits of the component districts. This calculation, using a weighted-average approach, is revenue neutral and does not yield new revenues.

(2) The calculation of an adjustment for salary and benefit differentials. This part of the calculation yields new revenues that cannot exceed a 10% increase in revenue limit income.

We have reviewed the County Office's revenue limit calculations for the unification of Sonora High School District with all of its feeder elementary districts, and agree with the conclusion that such a unification would yield the maximum 10% increase in base revenue limit (see Appendix E). We performed the parallel calculation of what would happen if Summerville High School District unified with its two feeder elementary districts, and conclude that it would also

qualify for the maximum 10% increase (see Appendix E). In both cases, the additional funding would be less to the extent that some of the feeder elementary districts opted out of the unification.

Curiously, if all the districts in the county unified into a single district, there would be no increase at all in revenue limit funding, since no one component district would comprise at least 25% of the total ADA of the newly organized district, and so no district would meet the standard of being the target for leveling up salaries and benefits. There are, however, two options for generating additional revenue limit income for a countywide unified school district. One option is to unify incrementally, for example, by first unifying along high school boundaries and then unifying countywide. A second option would be to seek special legislation modifying current law so as to allow additional revenue limit funding for a countywide unification.

Unionization of two or more elementary districts would also generate additional funding, as long as at least one district with above-average salaries and benefits was large enough to meet the 25% threshold. Since there are so many possible combinations of elementary districts—from merging any two districts to merging up to seven of the feeder districts to Sonora High School District[2], it is impractical to calculate all possible combinations.

As discussed in Appendix C, the additional revenue limit funding, while based on differentials in average salary and benefit costs, may be more or less than the amount needed to "level up" the employee compensation to that of the highest district. And since the decision of whether to increase compensation to that of the highest district is up to the governing board of the new district, it is not possible to determine whether the additional funding will be sufficient—or exceed—the cost of transitioning to a single salary and benefit schedule. But it should be assumed that most or all of the additional funding will be needed for compensation, rather than available for program enhancements.

It should be noted that any unification or unionization resulting in a district of more than 3,000 ADA would result in a loss of necessary small school funding. For a unification along the lines of Sonora High School District, the loss would be minor—only about $39,000. There would be no change in necessary small school funding for a unification along the lines of Summerville High School District, since the resulting district would have only about 2,000 ADA and so would still be small enough to qualify for necessary small school funding. But a countywide unification would result in a loss of well over $1.5 million in necessary small school funding.

What are the Potential Advantages of Unification?

1. Better deployment of administrators is likely to occur. Instead of "wearing too many hats," like today, administrators could focus on their areas of expertise, e.g., personnel, business,

[2] If all the elementary feeder districts to a high school district unionize, the resulting union elementary district would be coterminous with the high school district and, per state law, those districts would automatically be unified (ref. Education Code Section 35542(a)). Thus, Summerville Elementary and Twain Harte could not unionize without triggering unification. Similarly, all eight elementary feeder districts to Sonora High School District could not unionize without triggering unification.

curriculum, pupil services, facilities, etc. The larger district would have a greater ability to attract and retain qualified administrators and less administrator turnover.

2. Eliminate duplicative costs incurred for board stipends and benefits, preparation of multiple state reports and the maintenance of separate books, time spent "reinventing the wheel," e.g., developing procedures and forms, planning activities like staff development, keeping abreast of and responding to changes in laws and funding, shopping the best price on supplies, etc.

3. Possible reduction in administrative costs. This is difficult to quantify since a majority of administrator positions would be reorganized and not eliminated. The decision of reorganization and/or elimination of positions would be the new governing board's decision. The bottom line is that the same number of pupils would be served and this could realistically require as many positions. However the positions might be better or more efficiently deployed.

4. Advantages to struggling districts that could be fiscally "saved" by unification.

5. Positive effects on employees include:

   - Increased pay for those on the lower salary schedule.
   - More advancement opportunities.
   - Ability to transfer to other school sites and programs without diminution in pay.
   - More staff development and peer group interaction opportunities.
   - Greater bargaining power with increase size of the unit.
   - Classified staff *do* have a legal right to their job and current pay for two years, in other words lay-offs are not permissible.

6. Consistency in policy-making, for example policies for field trips, sports participation, and grade level articulation.

7. Ability to develop magnet schools.

8. More stable educational program, that is:

   - Less subject to political winds or as some interviewees termed it micromanagement by the governing board.

   - Not as dependent on a single teacher to run the program. For example, today when the only 8th grade science teacher leaves, the program's continuity and quality is dependent on finding a suitable replacement. In a larger district, there would be more credentialed science teachers in which to carry out program goals.

9. Better able to handle students in transition in a single system. Thus, when students change schools they do not change districts, change textbooks, and need to be reevaluated for program placement.

10. More facilities flexibility, that is the ability to reconfigure school site grade levels and programs.

What are the Potential Disadvantages?

1. Potential Negatives for Staff:

   - An employee could be transferred to another site without the employee's agreement.

   - Employees on the higher salary schedule could be Y-rated, that is held at that pay level, if the state's dollars are insufficient to cover the costs of leveling up to the highest schedule.

2. Less direct access to superintendent and governing board.

3. Equity of resource distribution. There is a concern at the elementary level that dollars would be siphoned off and programs cut to fund a more expensive high school program. This concern should be balanced by the understanding that the high school districts currently have higher funding that is incorporated into the blended funding for the unified district.

4. Fiscal disadvantages. There would be a loss of necessary small school funding, including necessary small summer school and loss of necessary small community day school funding. Chinese Camp is a necessary small elementary school and would lose some funding if a unification that resulted in a district with 2,500 or more ADA occurred (e.g., the Sonora High unification). This loss may be offset by the increased revenue limit funding due to salary and benefit differentials.

5. More formal channels of communication, necessary for internal control in larger organizations, may result in a more bureaucratic type organization.

6. Loss of "ownership." Some school districts are less willing to share fund balance reserves with districts that have been less fiscally prudent.

7. May affect the outcome of a general obligation bond if communities feel they are being taxed for a facility that is not within their community. Community facilities districts, Mello-Roos, and developers fees might alternatively be used to finance these facilities.

8. Articulation, even if unified, is not guaranteed. It takes leadership and participation by teachers.

9. A fiscal consideration is whether or not the added state dollars from unification are sufficient to level up the salaries to the highest district. A shortfall in money means that staff might be held at their current pay until the salary schedule catches up (see discussion above regarding the revenue limit calculation).

10. There may be some loss of Title 1 categorical dollars to individual school sites post unification. The total pot of money would be the same, but the federal government requires the funds to be allocated to school sites that are targeted with the greater need. However, in discussions with the special programs office at the County Office, the dollar reallocation would probably be minor.

11. Concern was expressed that one school may become the "dumping" ground for non-performing teachers and/or students.

How is this Option Accomplished?

Through a unification that is initiated either by all of the affected governing boards or by a citizen's petition of 10% or 25% of the registered voters in any of the districts to be reorganized (ref. Education Code Section 35700 and 35721). Note: the 25% petition guarantees an SBE hearing even if the county level recommends disapproval. Charts 2 and 3 illustrates the various steps in a unification. This process typically takes two to three years (or more if contested), is handled at the state level, and requires an election.

Chart 2
UNIFICATION INITIATED BY OWNERS, 25%
PETITION, OR DISTRICT GOVERNING BOARD
UNINHABITED
TERRITORY
Petition and Owners
OR
Petition by Majority of
Board Members or
Affected Districts
E.C. § 35500
START
INHABITED
TERRITORY
Owners, 25% of
Assessed Value
Petition by Majority of
Board Members
Affected Districts
E.C. § 35500
Does
Opposition
Fail Reasonable
Standard
Specified
Pursuant to
E.C. § 35753
No
STOP
Yes
Clerk Publishes
Notice of Public Hearing
E.C. §§ 35761, 35762
Public Hearing
Held E.C. § 35705
Clerk Checks
Petition
E.C. § 35753
Public Agency
Comments Received
on Petition
E.C. § 35706
Public Agency
Recommendation
and Request to
State Board E.C. § 35707
Hearing Date Set
and Notification
of Hearing
E.C. § 35708
Public Hearing Held
E.C. § 35774 (2)
Petition
Approved
E.C. §§ 35759,
35760
Yes
No
STOP
Notice Sent to
County Superintendent
E.C. § 35711
EXCEPTIONS
CEQA
(1) Unless petition was accepted by LAFCO before January 1, 2000, and LAFCO approved or conditionally approved the petition before January 1, 2001.
(2) CEQA applies to actions of the State Board of Education.

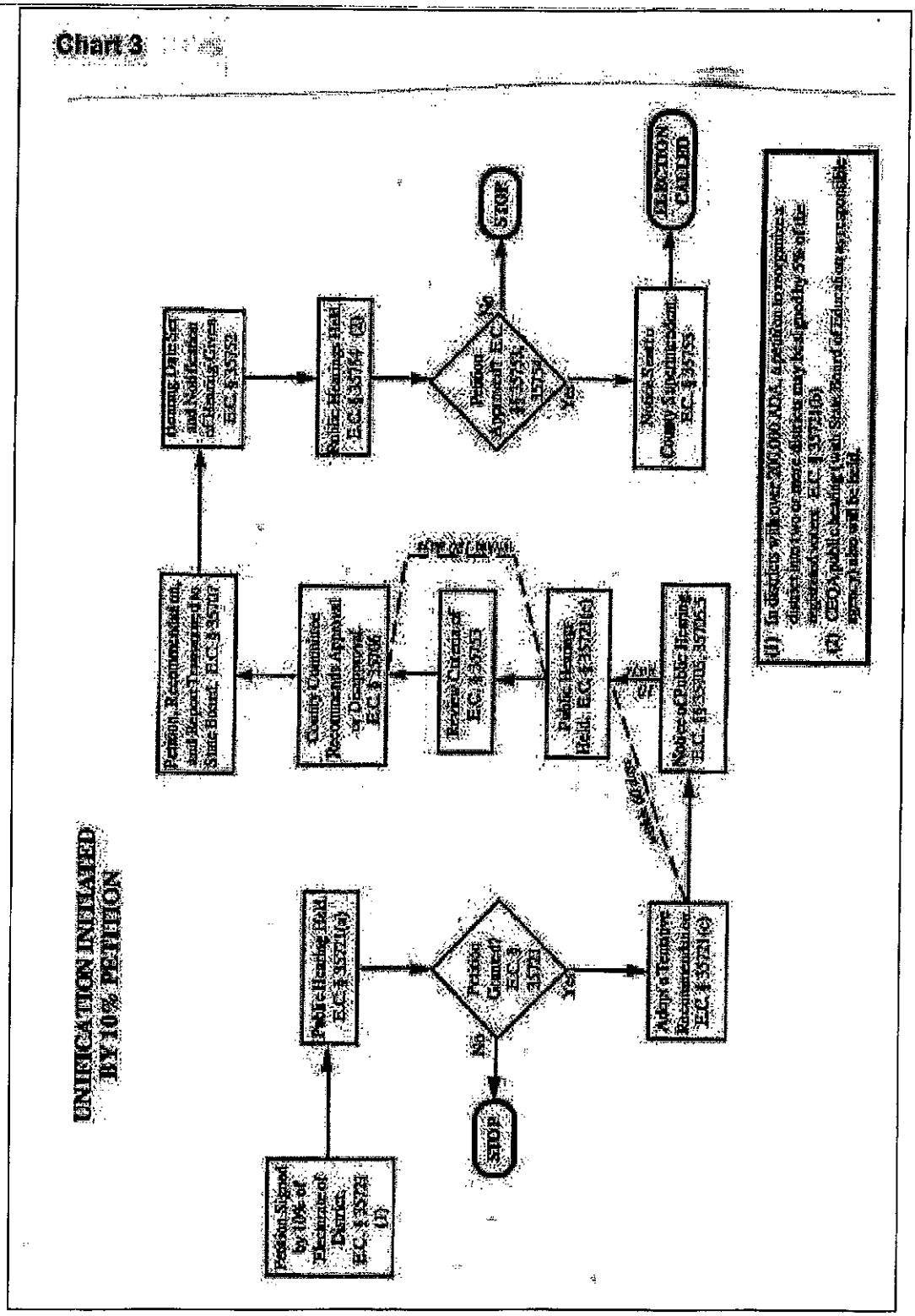


Chart 3
UNIFICATION INITIATED BY 10% PETITION

Appendices

Appendix A

About the Sonora Area Foundation

The Sonora Area Foundation, established in 1989, is a community foundation that accepts charitable contributions and channels them to worthy projects in Tuolumne County and acts as a neutral convenor on community issues. The Foundation now has assets of more than $8 million. The governing board regularly awards grants from its unrestricted assets for projects that fulfill the foundation's mission: to enhance the quality of life in the communities it serves. The Foundation also administers more than 70 charitable funds set up for scholarships and other charitable causes.

For more information on the Foundation and its activities, contact Executive Director Mick Grimes or Program Manager Lin Freer at (209) 533-2596.

Appendix B

About the Consultants

School Services of California, Inc. (SSC), an independent, Sacramento-based consulting firm, has a 25-year history of providing high-quality services to school districts and County Offices throughout the state. During this 25-year period, the firm has conducted numerous studies similar to the one requested by Sonora Area Foundation.

As a non-partisan, independent, privately owned California-registered corporation, SSC is not affiliated with any local, state, or federal public agencies. Neither our firm's owners nor any key employees reside, serve on school boards, or own businesses within the Tuolumne County area. We state, without qualification, that the analysis performed is impartial.

The expansive scope and large number of key issues surrounding the proposed study in the Tuolumne County area requires specialized expertise, not just reorganization processes and criteria, but in methodologies to provide more effective educational delivery systems. The study is a combination of reorganization issues, educational concerns, financial considerations, governance structures, and community identity, to name a few. SSC is unique in that we provide specialized services in all of these areas. The three directors assigned to this project have been carefully selected based on how their experience will benefit the study. All persons assigned are full-time career employees at School Services and as such have the availability of daily professional communication and attention as demanded by a project as comprehensive as this study.

Our Project Director, CHRISTY WHITE, has more than 15 years of experience with school administrative and governance issues and has been employed by SSC for the past five years. Formerly an audit manager, Ms. White provides technical expertise in all financial and operational issues related to reorganization. She is well versed in the state's nine reorganization criteria, and has extensive hands-on experience in school district operations and reorganizations. Ms. White, along with Paul Goldfinger, is the co-author and co-presenter of a workshop co-sponsored by SSC and the state's Fiscal Crisis and Management Assistance Team (FCMAT) titled "Fiscal Implications of School District Organization." Colleagues of Ms. White assigned to Sonora Area Foundation's study include:

> JERRY TWOMEY, a former audit manager with the State Controller's Office, with 15 years of experience, and a key consultant on all SSC reorganization consulting projects, in addition to working in the area of budget analysis and review.
>
> PAUL GOLDFINGER, the statewide-recognized expert on revenue limits and special education issues with 28 years of experience in California school finance.

Appendix C

Introduction

Even in these relatively good financial times, many school administrators are still looking at every possible option for reducing expenditures and increasing revenues. One option that holds the potential of accomplishing both goals – reducing duplicative expenditures and increasing state aid – is school district consolidation. By consolidating school districts, it is often possible to reduce expenditures through the elimination of duplicative services. Also, state law provides an increase in total revenue limit for a district that consolidates in recognition of the need to have a common salary and benefit schedule for all of the employees of the new district.

Overview of Revenue Limit Changes

When districts reorganize – whether through unification, unionization, annexation, transfer of territory or transfer of a junior high school program[3] – the revenue limit for the newly reorganized district is calculated in two steps: (1) the blending of base revenue limits of the component districts; and, (2) the calculation of an adjustment for salary and benefit differentials. The blending of the base revenue limits of the former component districts uses a weighted average approach. This calculation is revenue neutral and does not yield any increased funding to the new district.

It is only the adjustment for salary and benefit differentials that yields new revenues. The calculation of this adjustment starts with the determination of the average cost of certificated salaries and benefits per full-time equivalent employee (FTE) and then identifies the cost of increasing the certificated employees in the component districts with low average costs up to the level of the district with the highest average costs. A second, parallel calculation is performed for classified employees. The sum of these changes for both certificated and classified employees, divided by the total ADA for the newly reorganized district, is added to the new district's base revenue limit.

This revenue limit increase for salaries and benefits is the *only* increased funding for a newly reorganized district. Special education funding is now calculated based only on the ADA for a special education local plan area (SELPA) as a whole, not for an individual district, and is not affected by district reorganization. And all other state categorical funding for a newly reorganized district is calculated on a revenue neutral basis. For those categorical programs that are funded on a per-ADA basis, such as K-8 instructional materials, the funding for a newly reorganized district is based upon the sum of the ADA from its component districts. And for those categorical programs where funding in one year is based on the funding in the prior year,

[3] Unification is the formation of a new K-12 district from elementary and high school districts, while unionization is the formation of a new district from districts of the same level – elementary, high school or unified. Annexation is when one district is merged into another district that continues to operate.

such as state aid for transportation, the funding for a newly reorganized district is simply based on the sum of the funding for the component districts.

Revenue Limit Increase Versus Cost Increase

It is important to understand that the calculation of the revenue limit increase for salaries and benefits is not directly related to the actual cost increase that a newly reorganized district may incur when moving to a common salary and benefit schedule – for two reasons. First, a reorganized district may negotiate any salary schedule and benefit package. That is, there is no legal requirement that the newly reorganized district use the highest salary schedule of its component districts, even though the salary/benefit add-on is based on the cost to "level up" to the highest cost agency. And, second, the additional revenue limit funding is based on a calculation involving the *average* costs of salaries and benefits per certificated or classified FTE, not on the cost of shifting employees to a common salary and benefit schedule.

To make this latter point clear, consider two examples involving the unification of two school districts. As a first example, if both districts had identical salary and benefit schedules, but one district had more senior staff than the other, the district with the senior staff would have a higher average cost for salaries and benefits per FTE. Even though there would be no cost of moving to a common salary schedule, the revenue limit calculation would, nevertheless, result in additional funding because of the difference in *average* costs.

As a second example, suppose that these two districts had *different* salary and benefit schedules, but where the district with the lower schedule had a higher level of seniority and its average cost per FTE turned out to be exactly the same as the other district. Although there would be a cost of moving the lower paid employees to the higher salary schedule, the revenue limit calculation would result in no additional funding for salaries and benefits, simply because the *average* cost per FTE was identical.

Although these two examples highlight the inconsistency between the revenue limit calculation and the cost of moving to a common salary and benefit schedule, as a practical matter the additional revenue limit funding is close to the amount needed to move all employees to the highest schedule in most district reorganizations.

Another point is that the calculation of the revised revenue limit is based on data for the component districts two years prior to the effective date of the reorganization. For example, for a reorganization that will become effective in 2000-01, the calculations shall be based upon revenue limits, ADA and salary and benefit costs per FTE in 1998-99. The use of data two years prior to the effective date of the reorganization is intended to use "known" data and data that cannot be manipulated by making salary or benefit changes just before the effective date of the reorganization.

BLENDED BASE REVENUE LIMIT

The first step in calculating the base revenue limit for the newly reorganized district is the calculation of the blended base revenue limit. In simplest terms, this calculation is equal to the total base revenue limit for all the component districts divided by the total ADA for the newly reorganized district.

Impact of SB 727 – Exclusion of Excused Absences

Pursuant to SB 727 (Chapter 855/1997), excused absences no longer count toward ADA, effective 1998-99. To offset this loss of ADA, base revenue limits were adjusted upwards corresponding to a district's excused absence rate in 1996-97.

As noted above, the calculation of the revised revenue limit for a district that reorganizes is based on data two years prior to the effective date of the reorganization. Reorganizations that become effective in 2000-01 thus use 1998-99 base revenue limit data, and this is already adjusted for the exclusion of excused absences. But for a reorganization that took effect in 1999-00, the blending of the revenue limit needs to be based upon each district's 1997-98 "rebenched" base revenue limit – that is, the 1997-98 base revenue limit adjusted to offset the exclusion of excused absences – and the 1997-98 ADA excluding excused absences. The appropriate 1997-98 amount appears in 1998-99 Form K-12, Line A (EDP025).

Weighted Average Calculation

Example 1 is for a reorganization that becomes effective in 2000-01 and which uses 1998-99 data for the revenue limit calculation.

This example shows that the weighted average calculation is revenue neutral since it yields the same total base revenue limit as for the sum of the component districts. That is, as shown in the calculation at the end of Example 1, the blended base revenue limit of $4,357.24 per ADA times the 3,800 ADA of the newly reorganized district yields the same total revenue limit as the sum of the base revenue limits for the component districts (to within a small round-off error).

The steps used in the blending calculation using 1998-99 data are as follows:

Step 1. For each affected district, multiply the district's 1998-99 base revenue limit by the number of 1998-99 ADA. If a district is wholly included in the newly reorganized district, then this calculation will be based on the district's revenue limit ADA (i.e. the greater of current or prior year ADA). If only a portion of a district is to be included in the reorganization, the law stipulates that the county superintendent is to make the determination of the number of ADA that will be included in the proposed school district. For instance, in Example 1, only part of the high school district is unifying with three of its feeder elementary districts and the balance of the high school district will continue to exist. As indicated in this example, 1,200 of the high school district's 2,400 ADA will become part of the newly unified district, equal to exactly 50% of the district's ADA.

Step 2. Add the sum of the amounts determined in Step 1 for each affected school district to obtain the total base revenue limit for the component districts.

Step 3. Divide the sum determined in Step 2 by the total ADA in the newly reorganized school district. The total ADA used here is equal to the sum of the ADA of the component districts used in Step 1.

EXAMPLE 1. BLENDED BASE REVENUE LIMIT USING 1998-99 DATA ..... – FOR A REORGANIZATION EFFECTIVE 2000-01

District	1998-99 Base Revenue Limit per ADA (A)	1998-99 Revenue Limit ADA (B)	Affected ADA (C)	Percent of District in Reorganization (D) = (C) / (B)	Computed Total Base Revenue Limit (E) = (A) x (C)
Elementary District 1	$4,075.00	900	900	100.00%	$3,667,500
Elementary District 2	4,100.00	1,500	1,500	100.00%	6,150,000
Elementary District 3	4,300.00	200	200	100.00%	860,000
High School District	4,900.00	2,400	1,200	50.00%	5,880,000
Totals			3,800		$16,557,500

Blended Base Revenue Limit per ADA = $16,557,500 divided by 3,800 affected ADA = $4,357.24

Check: $4,357.24 times 3,800 ADA = $16,557,512 (or the same amount to within a $12 round-off error)

The result of Step 3 is the blended base revenue limit per ADA for the newly reorganized district.

SALARY AND BENEFIT ADJUSTMENTS

The second part of the revenue limit calculation for a newly reorganized district is the calculation of the adjustments for the salary and benefit differentials. As discussed earlier, this calculation is based solely on the differentials in average costs per FTE, and not on the cost increase that a district may incur in shifting to a common salary and benefit schedule.

The following are the steps in calculating the salary and benefit adjustments. This calculation is to be done twice – once for certificated staff and a second time for classified staff.

Change in Law Reinstates Calculation for Small Districts

Legislation enacted in 1994 changed the calculation of the salary and benefit adjustments by completely excluding small districts – those with less than 25% of the total staff in the new district. Fortunately, new legislation enacted in 1998 – AB 2328 (Chapter 906/1998) – repealed this provision and reinstated the salary and benefit "add-ons" for small districts (ref. Education Code Section 35735.1).

Average Salaries and Benefits Per FTE

The next step is the determination of the average costs of all salaries and benefits per FTE for certificated staff and the corresponding amount for classified staff. The components of this calculation are as follows:

- Add all salaries and benefits for certificated or classified employees, including both part-time and full-time employees.[4]

- Divide the total certificated salaries and benefits by the number of certificated FTE and divide the total classified salaries and benefits by the number of classified FTE.[2]

Note that this calculation includes all certificated staff – teachers, counselors, administrators, etc. – in the certificated calculation and all classified staff in the classified calculation.

[4] Collecting the data for both total expenditures and FTE counts for certificated and classified staff is often the hardest part of these calculations. The section below entitled "Collecting Salary, Benefit and FTE Data" gives guidelines for where to look (and not look) for this data.

Salary and Benefit Adjustments

After determining the average cost per FTE for each district, the next step is to determine the highest average certificated (and highest average classified) cost per FTE among the component districts. For the purposes of determining which district has the highest average cost – that is, which district has the highest average cost per FTE that is used as the target to "level up" the other districts – only those component districts with 25% or more of the total ADA of the reorganized district are eligible. This provision avoids the situation where a small district with high salary/benefit costs becomes the "level up" target for all of the other districts.

The final step in this calculation is to determine the amount needed to raise the staff of all component districts that did not have the highest average cost per FTE up to that highest level. As shown in Part A of Example 2, while Elementary District 3 has the highest average cost, it has far less than 25% of the total ADA and so cannot be considered to have the highest average certificated cost per FTE for this calculation. Of the eligible districts, the High School District has the highest average certificated cost per FTE of $63,000. Through the "level up" process, both Elementary Districts 1 and 2 have their average costs for certificated staff raised up to that of the highest eligible district. For example, District 1 has an average cost of $48,000, or $15,000 less than the highest eligible district. This calculation then involves multiplying this $15,000 difference by the 37 certificated employees in District 1 to yield $555,000.

As shown in Part B of Example 2, the calculation for classified staff is done independently of the calculation for certificated staff. In this case, Elementary District 2 has the highest average cost per FTE for classified staff (unlike the certificated calculation where the High School District had the highest average cost per FTE).

Part C of Example 2 shows that the total adjustment for certificated and classified salaries and benefits is $1,586,500. Dividing this total dollar amount by the 3,800 ADA used in the blending calculation (i.e. including only 1,200 of the 2,400 high school ADA) yields a revenue limit add-on of $417.50 per ADA for salaries and benefits. Adding this to the blended base revenue limit of $4,357.24 yields the new base revenue limit for the unified district of $4,774.74 per ADA.[3]

Prior to 1998, Elementary Districts 1 and 3 would have been completely excluded from this "level up" calculation. The recent change in law thus allows an additional $649,000 – or over $170 per ADA – to be included in the revenue limit calculation.

[3] As discussed later in this chapter, a newly reorganized district is eligible to receive the full add-on to the base revenue limit for salary and benefit adjustments only if there are suitable facilities for all of its students.

10% Cap and Deficit on Salary and Benefit Adjustments

Statutory law provides that the amount of the add-on for salary and benefits adjustments per ADA cannot exceed 10% of the blended base revenue limit per ADA (ref. Education Code Section 35735.1(a)(4)(A)). Since the computed add-on for salary and benefits in Example 2 is 9.58% of the blended base revenue limit, it is within this 10% limit.

However, it should be kept in mind that this revenue limit add-on is subject to the K-12 revenue limit deficit – currently 6.996%. Thus, while the newly unified district's base revenue limit would include $417.50 per ADA in additional revenues from the salary and benefit adjustments, after factoring in the 6.996% estimated revenue limit deficit, the district's real increase in funding would be only $388.29 per ADA in 2000-01 (assuming no change in deficit factor).

State law specifies that the resultant base revenue limit per unit of ADA for the newly reorganized district cannot exceed the amount set forth in the proposal for reorganization that was approved by the State Board of Education (ref. Education Code Section 35735.1(c)). However, the section goes on to state that the Superintendent of Public Instruction may make technical adjustments to the calculation of the new base revenue limit, "if necessary to cause those apportionments to be consistent with this section," without further State Board of Education action.

Bringing the New Base Revenue Limit Up to Date

Since the calculation of the base revenue limit for the reorganized district is performed using data for the second year prior to the effective date of the reorganization, it is necessary to bring it up to date by adjusting it for:

- The inflation increases that the reorganized district would have received for the fiscal year prior to the reorganization and for the fiscal year of the reorganization (see Part D of Example 2); and,

- Any other adjustments to the base revenue limit that the reorganized district would have been eligible to receive had it been reorganized two years earlier. For example, if any of the components districts participated in the minimum teacher's salary program in 1999-00, the revenues received would be folded into the newly reorganized district's base revenue limit in 2000-01.

Declining Enrollment

As a general provision of state law, a school district is a funded for the greater of its current year or prior year ADA. However, for a school district involved in a reorganization or a transfer of territory, the prior year ADA must be adjusted for any loss or gain due to the reorganization or territory transfer (ref. Education Code Section 42238.5(a)(1)).

Example 2. Salary and Benefit Adjustments and Total Base Revenue Limit

Part A. Calculation for Certificated Salary and Benefits

District	Total Salaries & Benefits (A)	Certificated FTE (B)	Average Salaries & Benefits per FTE C) = (A)/(B)	Percent of District in Reorganization (D)	Affected FTE (E) = (B) (D)	Affected ADA	25% or More of Total Affected ADA? (need 950 or more ADA)	Level Up Target = Highest Average Among Those Above 25% (F)	Cost to Move Those Above 25% to Highest Average (G) [(E) (C)] (E)
Elementary District 1	$1,776,000	37.00	$48,000	100.00%	37.00	900	NO	$63,000	$555,000
Elementary District 2	2,250,000	50.00	45,000	100.00%	50.00	1,500	YES	$63,000	$900,000
Elementary District 3	130,000	2.00	65,000	100.00%	2.00	200	NO	N/A	N/A
High School District	7,056,000	112.00	63,000	50.00%	56.00	1,200	YES	63,000	0
Totals					145.00	3,800			$1,455,000

Example 2. Salary and Benefit Adjustments and Total Base Revenue Limit (Cont'd)

Part B. Calculation for Classified Salary and Benefit

District	Total Salaries and Benefits (A)	Classified FTE (B)	Average Salaries and Benefits per FTE (C)=(A)/(B)	Percent of District in Reorganization (D)	Affected FTE (E)=(B)*(D)	Affected ADA	25% or More of Total ADA? (need 950 or more ADA)	Level Up Target = Highest Average Among Those Above 25% (F)	Cost to Move Those Above 25% to Highest Average (G) (F-C)*(E)
Elementary District 1	$870,000	30.00	29,000	100.00%	30.00	900	NO	$32,000	$90,000
Elementary District 2	1,920,000	60.00	32,000	100.00%	60.00	1,500	YES	32,000	0
Elementary District 3	60,000	2.00	30,000	100.00%	2.00	200	NO	32,000	4,000
High School District	2,325,000	75.00	31,000	50.00%	37.50	1,200	YES	32,000	37,500
Totals					129.50	3,800			$131,500

Example 2. Salary and Benefit Adjustments and Total Base Revenue Limit (Cont'd)

Part C. Total Base Revenue Limit for Newly Unified District			
1. Blended Base Revenue Limit (Example 1)			$4,357.24
2. Add-on for Certificated and Classified Salaries and Benefits			
a.	Certificated Salary and Benefit Amount	$1,455,000	
b.	Classified Salary and Benefit Amount	$131,500	
c.	Total Salary and Benefit Amount	$1,586,500	
d.	Amount per ADA (i.e. $1,586,500 divided by 3,800 ADA) (this amount is 9.58% of blended base revenue limit)		417.50
3. Total 1998-99 Base Revenue Limit			$4,774.74
Part D. Bringing Base Revenue Limit Up to Date			
1. 1998-99 Base Revenue Limit			$4,774.74
2. 1999-00 COLA for Unified Districts			$60.00
3. 2000-01 estimated COLA for Unified Districts (@ 1.8% projected statutory COLA)			$78.00
4. 2000-01 Base Revenue Limit			$4,912.74
Note: District is now a high revenue district, with a 2000-01 estimated base revenue limit that is 11% above the average.			

Consider, for example, a high school district that loses a portion of its territory when an elementary district unifies. If the high school district's ADA is 5,000 in the year prior to the reorganization and only 4,000 in the year after the reorganization, it would not be funded for its prior year ADA of 5,000. Rather, the prior year ADA must be adjusted to reflect what the ADA would have been had the reorganization had been effective in that prior year. If, after adjusting for the loss of high school territory to the unifying district, the high school would have had 4,100 ADA in the prior year, then it would receive funding for 4,100 ADA in the current year.

Other Revenue Limit Changes

Impact on Other Revenue Limit Adjustments

In addition to the calculation of the new base revenue limit for a reorganized district, it is also necessary to recalculate the following other revenue limit components:

- The 1975-76 base year costs used to calculate the revenue limit adjustment for unemployment insurance (see Form K-12, EDP 958);
- The amount per meal for the Meals for Needy Adjustment (see Schedule G, Line A);
- The 1983-84 base year level of mandated summer school hours and historic hourly rate for these hours (see Schedule P, Lines A and B); and,
- The base revenue limit and ADA cap for adult education (see Form S, Lines A and B).

The CDE reports that there are no definitive guidelines for calculating these factors, and that they may be established by local agreement as long as they are revenue neutral. For example, in the case where only part of a high school or unified district is involved in a reorganization, and there is a need to divide the adult ADA cap between the newly reorganized district and the continuing district, that division may be made by local agreement as long as there is no net increase in the total adult ADA caps of the affected districts.

In most cases, however, the calculation of these revenue limit components should be straightforward. For example, the new amounts for the 1975-76 base year unemployment insurance and the 1993-94 base year level of mandated summer school hours would simply be equal to the sum of the amounts for the component districts, if the reorganization involved whole districts. And, in the case where a reorganized district included only part of a component district, it would be appropriate to prorate the amount for the component district based upon the percentage of the ADA included in the reorganized district. But for the other items – the amount per meal for the Meals for Needy adjustment, the historic hourly rate for mandated summer school, and the base revenue limit for an adult education program – it is necessary to compute the new amount using a blending (or weighted average) approach.

Elementary Districts May Be Excluded from a Unification

An elementary school district may be excluded from a new unification, if the governing board receives approval from the State Board of Education (ref. Education Code Section 35542). If such approval is given, the elementary district may continue to feed into the coterminous high school under the same terms that existed before the unification.

Junior High School Transfers Limited to 105% of Average

The transfer of seventh or eighth grade pupils between an elementary district and a high school district is a reorganization that triggers the recalculated base revenue limit discussed earlier in this chapter. However, state law also specifies the additional constraint that, when a seventh or eighth grade program is transferred, the receiving district shall not receive a revenue limit apportionment for those pupils in excess of 105% of the statewide average revenue limit for the type and size of the receiving district (ref. Education Code Section 35735.3).

If There Are No Suitable Facilities

If there are no suitable facilities for all students in a newly reorganized district, its base revenue limit shall only be adjusted by the blending calculation and it shall not initially receive the adjustments for salary and benefit differentials (ref. Education Code Section 35735.2). For example, an elementary district that unified with a portion of a high school district that did not include a high school would still receive a blended unified base revenue limit, even though initially it was still educating only elementary school pupils.

Then, as the district obtains its own facilities, the base revenue limit shall be increased for the salary and benefit adjustments, in proportion to the percentage of pupils it was originally unable to serve who are then being served. For a district in this situation, the annual independent audit shall include an audit of the data needed for the original revenue limit calculation and the annual increment allowed as the district serves additional students.

Clearly, a newly unified district without suitable facilities must have an arrangement with the neighboring district to serve its unhoused students. Such interdistrict ADA must be claimed by the district of attendance for apportionment purposes, and an interdistrict attendance agreement would need to be written by the affected districts (ref. Education Code Section 46304).

If, after five years from the date of reorganization, the district is still unable to provide school facilities to educate all of its own students, the CDE shall annually report and recommend to the State Board of Education whether the district should be lapsed. If lapsation is recommended by the CDE, the State Board of Education may direct the county committee on school district organization to revert the reorganized district to its former status or to have it annexed to neighboring districts.

If a Previous Reorganization is Reversed

In the late 1980s, several districts took advantage of what was then a loophole in the law and substantially increased their revenue limits through annexation or other forms of reorganization. Current law provides that, if a district reorganized on or before July 1, 1989 (for example, through the annexation of one district to another) and then split in a subsequent reorganization after July 1, 1989, so as to have territory that is "substantially the same" as before the original reorganization, then the revenue limit for that district will revert to the amount it would be as if the initial reorganization and subsequent splitting never occurred (ref. Education Code Section 35735.1(d)).

No State Board Waivers Available

The calculation of the new base revenue limit for a reorganized school district is not subject to waiver either by the State Board of Education or by the Superintendent of Public Instruction (ref. Education Code Section 35735.1(h)).

Collecting Salary, Benefit and FTE Data

The main part of this chapter discusses in detail the calculation of the salary and benefit adjustments for a newly reorganized district. Once the average cost for salaries and benefits per certificated FTE and per classified FTE have been determined, state law is very precise in how that data is to be used.

Curiously, state law is not nearly as precise in how to collect the data to determine these average costs per FTE, and numerous questions arise. For example, should costs for substitutes, overtime, coaching and other extra-duty pay, summer school stipends, retiree benefits, etc. be included? How should FTE be counted? And, should the data be for all funds, or only for the General Fund?

Because neither state law nor state regulations give definitive answers, the material in this section is offered by the author as a reasonable set of guidelines for determining both total costs and total FTE. It should be recognized, however, that differences of opinion exist. Since state law gives the county superintendent of schools the responsibility for calculating the salary and benefit adjustments, interested parties should definitely discuss the details of the data collection process with their county superintendent of schools office.

Determining Total Costs

In the opinion of the author, state law does clarify the cost part of the data collection by stipulating that the "amount of all salaries and benefits for certificated [or classified] employees of the district, including both part-time and full-time employees" is to be included (ref. Education Code Section 35735.1, emphasis added). But while all costs are to be included, it is often difficult to separate certificated costs from classified costs.

While salaries paid to certificated and to classified staff are clearly separated on the state's J-201 budget reporting documents, there is no clear separation on these forms between the benefits paid for a certificated versus classified staff. Instead, the separation is between instructional and non-instructional staff.[5] As a result of the data being reported in this way, the benefits for instructional staff include not only teachers but also instructional aides, while those reported for non-instructional staff include not only other classified employees, but also certificated administrators.

Thus, it is necessary to use other documents to separate total benefit expenditures for certificated staff from that for classified staff, and this means that it will often be necessary to determine this data on an employee by employee basis.

Determining FTE

While state law has clarified that *total* costs for salaries and benefits are to be included, state law provides no definitive rules for determining FTE.

Since total expenditures are based upon the amount actually paid over the course of a whole fiscal year, it would be appropriate to determine the number of FTE using an annualized average for the fiscal year. The FTE count should not include daily substitutes but should include long-term substitutes so as to count total FTE used without double counting both the absent employee and the substitute.

If it is possible to determine the annualized number of FTE, after taking into account late hire dates and vacancy days, that would be ideal. As a practical matter, however, it is often very difficult to determine an annualized average FTE level because of fluctuating number of employees due to differing hire dates, vacancies, etc. In the past, districts that have been unable to determine an annualized average number of FTE have used a "snapshot," such as the FTE for the March payroll or the FTE reported for the CBEDS information day.

STRS and PERS reports showing a given year's service credit should not be used to determine FTE counts for several reasons. First, one employee may represent more than 1.00 FTE, such an employee working in a year-round school who is on an extended contract. By contrast, the PERS or STRS report of annual service credit would show a maximum of 1.00 FTE per

[5] This distinction is made in order to check whether a district has expended the minimum percentage of current expense of education for the salaries and benefits of instructional staff – classroom teachers and instructional aides – as required by Education Code Section 41372.

employee. Second, some part-time classified employees may not be members of PERS and so would not be in the PERS report.

For classified employees, the number of FTE usually involves a mixture of 10-month, 11-month and 12-month employees as well as 6, 7 or 8-hour employees. There is no need to convert all employees to 8-hour/12-month equivalents. Rather, whatever a district itself considers to be a full-time equivalent position – for example, a 6-hour/10-month position for an instructional aide and an 8-hour/12 month-position for a central office clerk – may be used in determining the number of FTEs.

General Fund vs. All Funds

Another area of uncertainty is whether the salary/benefit and FTE data should be for the General Fund only, or for all funds. Since the law is also silent on this issue, common sense must be used.

Perhaps the clearest issue is that data for the Adult Education Fund should be excluded. After all, the revenue limit add-on for the salary/benefit differentials is an increase to a district's unrestricted General Fund income designed to pay for the cost of moving to a common salary schedule. But since General Fund revenues cannot be spent on the Adult Education Fund (ref. EC Section 52501.5), it would be illogical to include Adult Education Fund data.

Issues concerning other funds – mainly involving the cafeteria fund and child development fund – are harder to answer. One approach to take is to consider whether there would be a cost to the newly reorganized district for employees in these funds to move to a common salary schedule. Factors to consider include: (1) does more than one district use the fund?; (2) are salaries/benefits for employees in that fund negotiated separately?; and, (3) does the General Fund subsidize that Fund?

Best Advice – Be Consistent

Other local issues may arise. For example, some districts internally count additional FTE for coaching or extra-duty stipends, whereas other districts do not. Perhaps the most important rule in determining average costs per FTE is that the data for all districts involved in the reorganization should be collected in a uniform manner.

Other Revenue Changes

The revenue limit adjustment for salary/benefit differences is the only new funding for a district that reorganizes or is affected by a transfer of territory. All other apportionment changes are revenue neutral.

Many categorical funding formulas are based on ADA or enrollment. In these cases, the newly reorganized district will automatically be funded for its new ADA/enrollment.

But some formulas use historical amounts and so need special treatment. The two major programs affected in this way are:

- Transportation aid. For both regular home-to-school transportation and special education transportation, add the historical amounts for whole districts included in the reorganization and prorate the historical amounts for partial districts included in the reorganization. This proration may be based on the proportion of costs incurred by each portion of a district or other method agreed upon locally.

- Special education.

  Beginning in 1998-99, the new population-based funded model provides special education funding for each SELPA based on that SELPA's ADA. In lieu of the prior process of individual districts calculating their own revenues, each district receives a share of a SELPA's total funding based on the SELPA's local agreement. As a result, the SELPA – and not the state – will need to adjust the distribution of special education revenues to reflect the reorganization.

APPENDIX D:

ESTIMATED BLENDED BASE REVENUE LIMIT FOR THE UNIFICATION OF SUMMERVILLE HIGH SCHOOL DISTRICT

Part I. Calculation of Blended Base Revenue Limit

District	1999-00 Base Revenue Limit	1999-00 Revenue Limit ADA	Computed Base Revenue Limit
Summerville Elem	$4,180.26	455	$1,902,018.30
Summerville H.S.	$4,965.07	736	$3,654,291.52
Twain Harte	$4,160.90	708	$2,945,917.20
Totals		**1899**	**$8,502,227.02**
	Weighted Average		$4,477.21

Part II. Calculation of Salary and Benefit Add-Ons

District	Classified Salaries & Benefits	Classified FTE	Average Classified Sal/Ben per FTE	1999-00 Revenue Limit ADA	25% or more of total ADA? (need 474.75)	Highest Average Among Those Over 25%	Cost to Level up To Highest
Summerville Elem	$708,138.00	23.00	$30,788.61	455	No	$43,324.23	$288,319.19
Summerville H.S.	$1,819,617.48	42.00	$43,324.23	736	Yes	$43,324.23	$0.00
Twain Harte	$886,002.13	25.00	$35,440.09	708	Yes	$43,324.23	$197,103.51
Totals				**1,899**			**$485,422.70**

District	Certificated Salaries & Benefits	Certificated FTE	Average Certificated Sal/Ben per FTE	1999-00 Revenue Limit ADA	25% or more of total ADA? (need 474.75)	Highest Average Among Those Over 25%	Cost to Level up To Highest
Summerville Elem	$1,715,455.00	32.00	$53,607.97	455	No	$59,913.49	$201,776.54
Summerville H.S.	$1,548,847.82	29.00	$53,408.55	736	Yes	$59,913.49	$188,643.26
Twain Harte	$2,516,366.39	42.00	$59,913.49	708	Yes	$59,913.49	$0.00
Totals				**1,899**			**$390,419.80**

Part III. Summary

1. Blended Base Revenue Limit		$4,477.21
2. Salary and Benefit Add-Ons		
a. Classified	$485,422.70	
b. Certificated	$390,419.80	
c. Sum	$875,842.51	
d. Amount per ADA		$461.21
3. Total 1999-00 Base Revenue Limit	(first calculation)	$4,938.42
4. Maximum Base Revenue Limit	(=110% of Line 1)	$4,924.93
5. Total 1999-00 Base Revenue Limit	(final calculation)	$4,924.93

Appendix E

Estimated Blended Base Revenue Limit for a Reorganization in 2002-2003

District	1999-2000 Revenue Limit per ADA (A)	1999-2000 Revenue Limit ADA (B)	Affected ADA in column (B) (C)	Percent of District in Reorg. (D)=(C)/(B)	Computed Total Base Rev. Limit (E)=(A)x(C)
Bellevue Elementary	$ 4,191.44	249.76 *	249.76	100%	$ 1,046,838.10
Chinese Camp School	$ 5,067.51	31.15	31.15	100%	$ 157,836.05
Columbia Union Elem.	$ 4,174.78	487.84	487.84	100%	$ 2,036,624.68
Curtis Creek School	$ 4,142.21	801.88 *	801.88	100%	$ 3,321,556.35
Jamestown Elem.	$ 4,148.80	484.05	484.05	100%	$ 2,008,774.49
Sonora School Dist.	$ 4,165.34	820.93 *	820.93	100%	$ 3,419,571.17
Soulsonville School	$ 4,153.42	637.28 *	637.28	100%	$ 2,646,891.50
Sonora High School	$ 5,024.01	1577.75	1577.75	100%	$ 7,926,631.78
Totals:			5090.66		$ 22,578,693.12

Average Revenue Limit per ADA = $ 22,578,693.12 / 5090.66 = $ 4,435.36 Blended RL per ADA

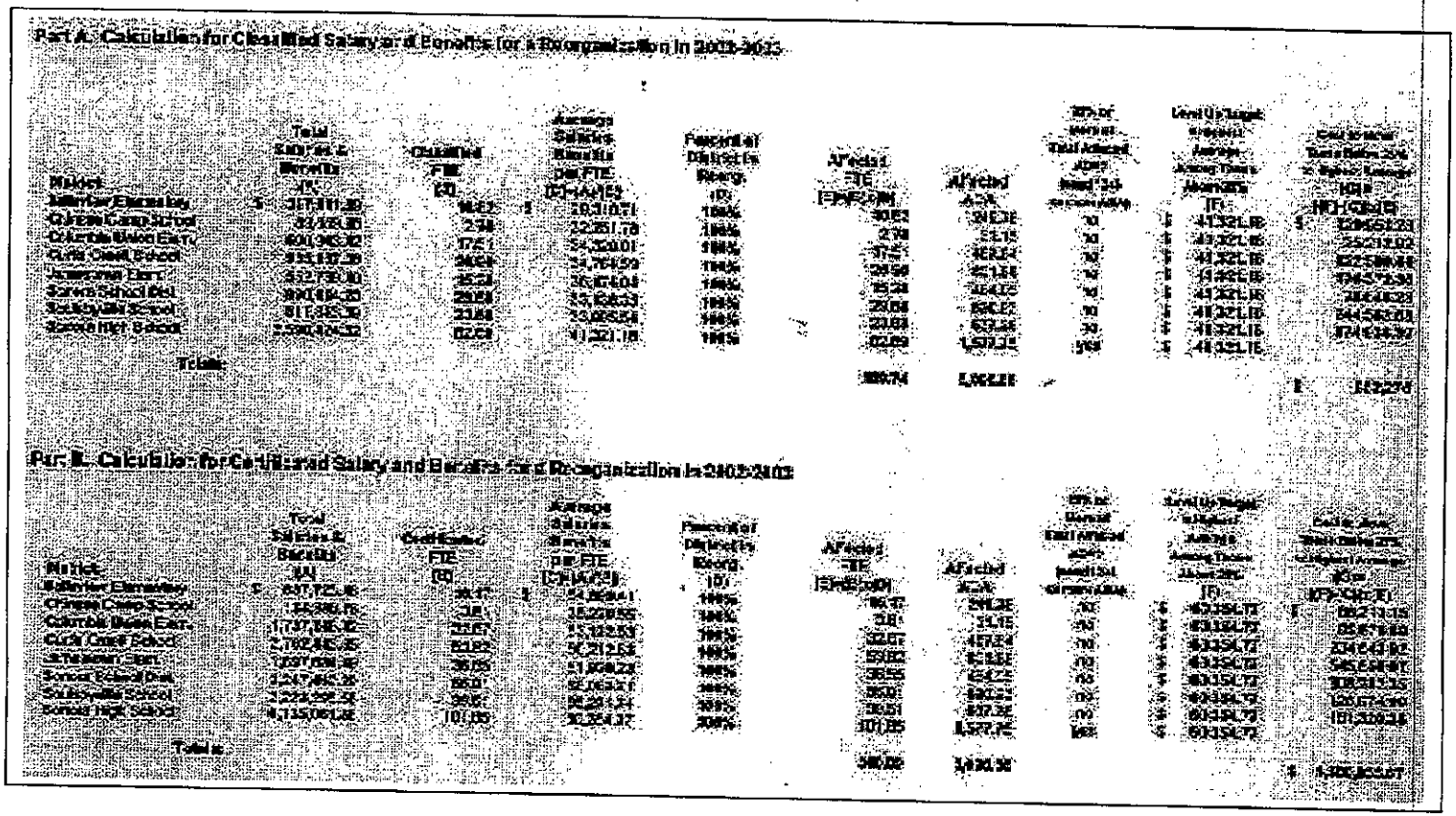
Proof: 5090.66 X $ 4,435.36 = $ 22,578,693.12

Sources:

Revenue Limit per ADA: 1999-2000 P-2 Revenue Limit Calculations [Underlying]

Revenue Limit ADA: 1999-2000 P-2 J-18/19s, Line F minus ROP, Adult Ed., Adults in Correctional Fac., and Extended Year.

* Or it is equal to the prior year funded ADA. [P-2 1998-99]



Part A. Calculation for Classified Salary and Benefits for a Reorganization in 2003-2013

District	Total Salaries & Benefits	Classified FTE	Average Salaries & Benefits per FTE	Percentage of District Pay	Affected FTE	Affected	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Millerton Elementary	$ 317,111.20	10.17	$ 20,310.71	100%	10.17	206.36	10	$ 41,321.16	$ 206,651.21
Children Camp School	33,120.00	2.78	22,351.78	100%	2.78	62.15	10	$ 41,321.16	$ 55,219.02
Columbia United Elem.	600,965.32	17.51	54,330.01	100%	17.51	951.24	10	$ 41,321.16	$ 723,599.44
Clark Creek School	935,617.39	34.04	34,764.59	100%	29.56	971.55	10	$ 41,321.16	$ 945,750.30
Jamestown Elem.	352,730.01	15.24	26,107.04	100%	15.24	354.02	10	$ 41,321.16	$ 354,423.23
Sonora School Dist.	890,184.20	28.03	35,696.33	100%	28.03	930.52	10	$ 41,321.16	$ 944,562.01
Sonora Valley School	811,815.30	23.03	33,065.54	100%	23.03	637.46	10	$ 41,321.16	$ 724,636.37
Sonora High School	2,390,124.50	62.04	41,221.16	100%	62.09	1,537.35	100	$ 41,321.16	[illegible]
Totals:					169.74	5,662.61			$ 183,274

Part B. Calculation for Certificated Salary and Benefits for a Reorganization in 2003-2013

District	Total Salaries & Benefits	Certificated FTE	Average Salaries & Benefits per FTE	Percentage of District Pay	Affected FTE	Affected	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Millerton Elementary	$ 697,722.48	26.17	$ 26,656.41	100%	26.17	698.25	10	$ 41,321.16	$ 698,251.71
Children Camp School	55,395.75	2.8	19,220.55	100%	2.8	53.15	10	$ 41,321.16	$ 55,219.02
Columbia United Elem.	1,777,135.12	43.07	41,262.53	100%	43.07	1,157.24	10	$ 41,321.16	$ 1,780,649.82
Clark Creek School	2,792,485.35	83.82	34,212.68	100%	83.82	2,251.55	10	$ 41,321.16	$ 2,340,643.92
Jamestown Elem.	1,037,004.30	36.55	41,908.23	100%	36.55	981.81	10	$ 41,321.16	$ 945,750.30
Sonora School Dist.	2,547,445.20	68.01	37,454.71	100%	68.01	1,827.11	10	$ 41,321.16	$ 2,809,815.35
Sonora Valley School	2,222,598.20	36.05	58,231.44	100%	36.05	968.51	10	$ 41,321.16	$ 1,490,774.90
Sonora High School	4,135,061.85	101.85	30,354.32	100%	101.85	2,735.42	100	$ 41,321.16	$ 101,320.16
Totals:					340.86	9,161.36			$ 4,395,855.07

Part C. Estimated Total Base Revenue Limit for Newly Unified District

1 Blended Base Revenue Limit		$	4,435.36
2 Add-on for Certificated and Classified Salaries and Benefits			
a. Certificated Salary and Benefit Amount	1,560,855.67		
b. Classified Salary and Benefit Amount	952,276.25		
c. Total Salary and Benefit Amount	2,513,131.92		
d. Amount per ADA(Total Salaries&Benefits(c.) / 5090.66)			493.68
3 Total 1999-2000 Base Revenue Limit w/Add-on		$	4,929.03
4 110% "Cap" of the Blended Revenue Limit		$	4,878.69
5 Amount over/(under) the "Cap"		$	50.14

Part D. Bringing Base Revenue Limit Up to Date

1 1999-2000 Base Revenue Limit	$	4,878.69
2 2000-2001 Estimated COLA for Unified Districts	$	138.00
3 2001-2002 Estimated COLA for Unified Districts	$	165.00
4 2002-2003 Estimated Base Revenue Limit	$	5,181.89

Appendix F

Glossary of Terms

ADA(Average daily attendance)—An average of a pupil's attendance over the course of the school year. ADA is the basic funding model for school districts; in 2000-01, one ADA equals approximately $4,315 for an average elementary school district and $5,185 for an average high school district.

Articulation—The coordination of curriculum content between grade levels, aimed at providing forward progression towards graduation.

California Department of Education (CDE)—State agency charged with fiscal and management oversight of California public schools.

Consolidation of schools—Primarily used to described a merger of two or more school districts (see unionization and unification), but also used to describe the merger of school facilities, that is, the closing of one or more schools and consolidating the students on a fewer number of campuses. Note: unionization and unification do not necessitate the closing of schools.

Core Academic—Basic course offerings, including English, social sciences, languages, physical education, math, science, visual and performing arts, applied arts, vocational—technical training and driver's education.

County Committee on School District Organization—An independent county-level school authority, operated through the County Office of Education, and charged with the review, recommendation, and approval (in the case of unionizations only) of school district reorganizations within the county.

County Office of Education—A separate legal governmental agency whose primary role is to provide fiscal oversight to school districts and special programs of instruction to students in the county, for example, court schools and special education services for the severely handicapped.

Electives—Optional classes for students. Electives may be choices among required courses, such as the choice of a specific math or English class from several options, or a course that is not required for graduation.

Joint Powers Agreements (JPAs)—Formalized agreements between school agencies to provide specified services in a collaborative manner.

Merger—Synonymous with unionization and unification, the consolidation of two or more school districts under a single governance structure.

Petition to Unionize or Unify—An act to initiate a process of school district reorganization. A petition can be made by majority vote of affected governing board members, signatures of registered voters in the area to be reorganized, the county committee on school district organization, and (in rare cases) individual property owners.

Regional Occupational Classes and Programs (ROC/P)—Vocational training, an alternative and supplemental program of instruction.

Reorganization—A legal term describing the process of redefining or redrawing school district boundaries. For example, consolidating school district boundaries under a single governance structure or transferring geographical territory to/from another school district.

Revenue Limit—The basic state funding guarantee to school districts, paid based on reported average daily attendance (ADA).

School District—A separate legal governmental entity with an elected governing board whose primary purpose is to provide public educational services.

State Board of Education (SBE)—A Governor-appointed independent body responsible for administering laws and regulations governing school agencies in the state. Note: the SBE decides all unification petitions for election.

Supplemental Program or Hourly Programs—Remedial or enrichment programs offered to students with identified needs, typically offered before school, after school, during breaks, and in the summer.

Textbook Adoption—A process of selecting a series of textbooks in core academic areas.

Unification—The merger of one or more elementary school districts with one or more high school districts to form a grade level K-12 school district.

Unionization—The consolidation of two or more school districts at the same grade level—elementary or high school—under a single governance structure.

Vocational Education—School-to-career type classes designed primarily for the non-college bound student.