Santa Clara County Office of Education

COUNTYWIDE CHIEF BUSINESS OFFICERS MEETING
OCTOBER 19, 2017
9:30 a.m. to 12:00 p.m.
MILPITAS ROOM

AGENDA

9:30 - 9:45	Welcome	Megan K. Reilly, Santa Clara COE
9:45 - 10:15	Alternative Education Program	Steve Olmos, Santa Clara COE
10:19 - 10:40	Great Shakeout Earthquake Drill - Drop, Cover, and Hold On	
10:40 - 11:25	School Budgeting Best Practices	Matt Bubness Government Finance Officers Association (GFOA)
11:25 - 11:40	State, Economic and Legislative Update	Michelle McKay Underwood School Services of California, Inc.
11:40 - 11:50	Technology Services Update	Cindy Patterson, Santa Clara COE
11:50 - 12:00	Updates and Questions - District Business and Advisory Services Update ◦ AB 1309 ◦ Checklist for Budget, First and Second Interim - Follow-up Questions	Judy Kershaw, Santa Clara COE Megan K. Reilly, Santa Clara COE

2017-2018 Meeting Schedule

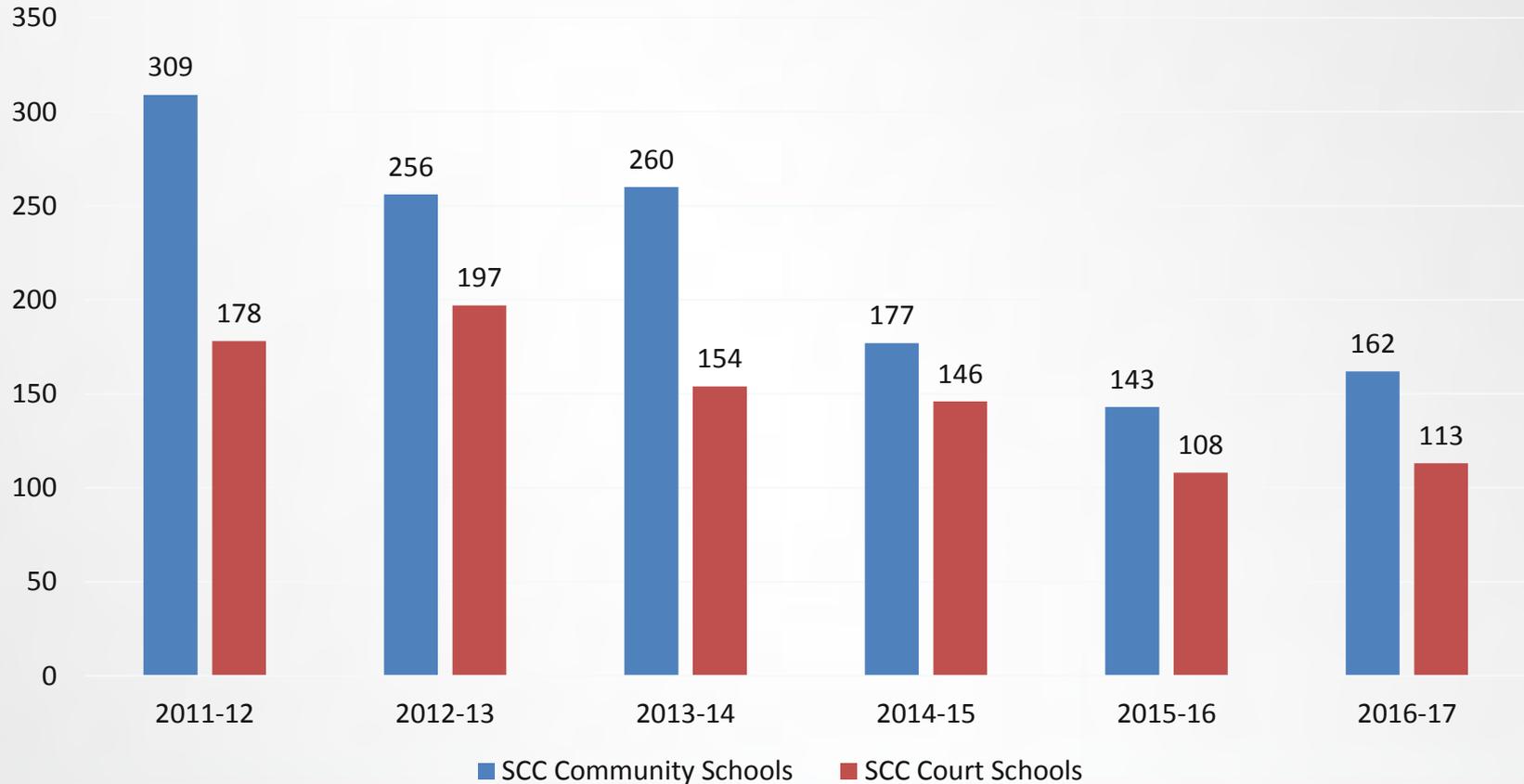| DATE	TIME	ROOM
October 19, 2017	9:30 a.m. - 12:00 p.m.	Milpitas Room
November 30, 2017	9:30 a.m. - 12:00 p.m.	San Jose Room
January 18, 2018	9:30 a.m. - 12:00 p.m.	Morgan Hill Room
February 15, 2018	9:30 a.m. - 12:00 p.m.	Oak Grove Room
March 22, 2018	9:30 a.m. - 12:00 p.m.	Milpitas Room
May 17, 2018	9:30 a.m. - 12:00 p.m.	Oak Grove Room

Purpose of Alt Education

- The Alternative Education Department (AED) provides educational programs for students under court supervision, and who are expelled or who are deficient in credits and have experienced challenges in matriculation in the traditional school settings.
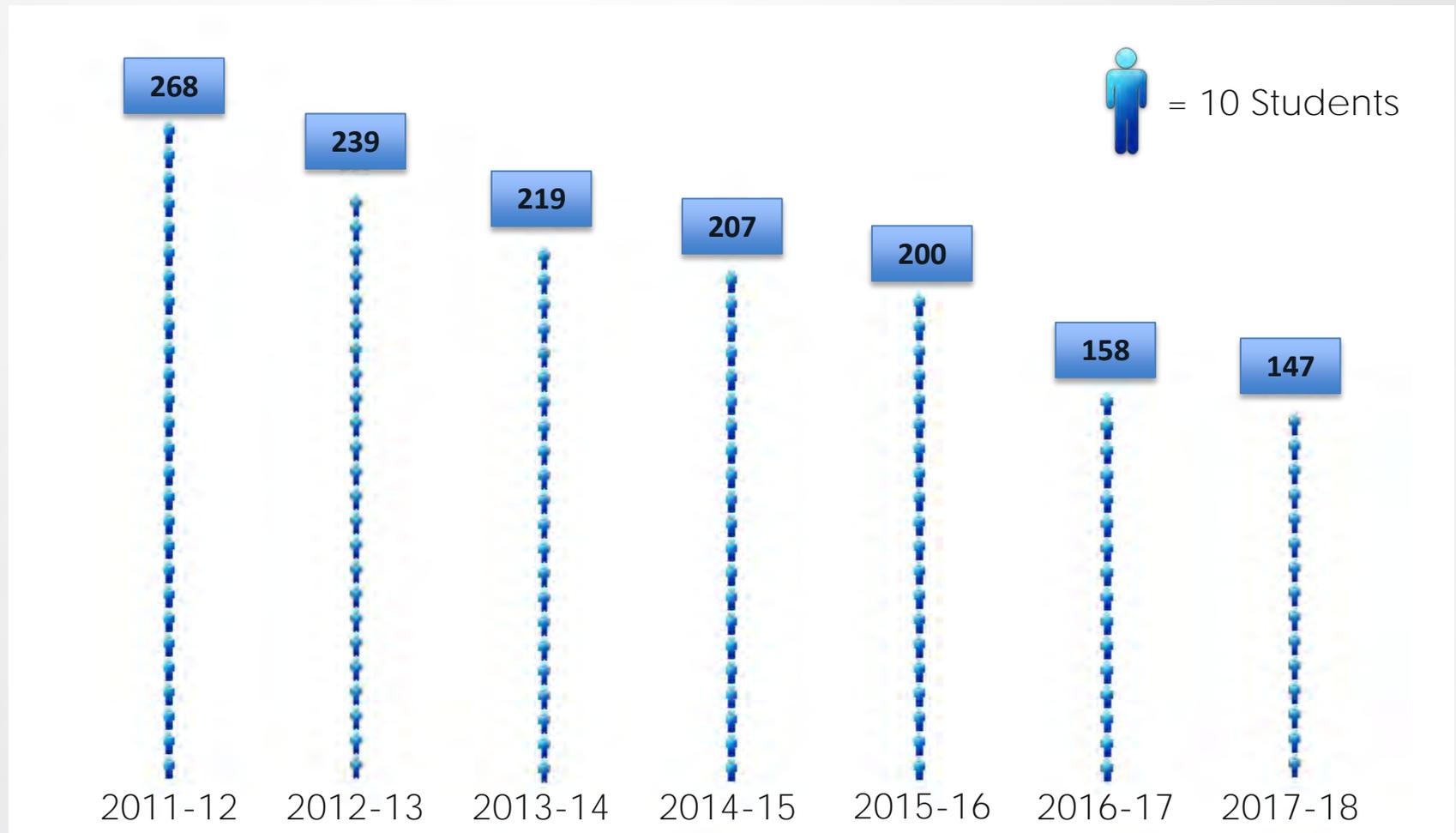
Alternative Education (AED) Revenue Sources

- Community Schools
- Non-Juvenile Court Schools (NJCS)
  - Local Control Funding Formula (LCFF)
    - Base, Supplemental and Concentration
  - State Lottery
  - Tuition/Allotments
  - General Fund Contribution

- Institutions
- Juvenile Court Schools (JCS)
  - LCFF
    - Base, Supplemental and Concentration
  - State Lottery
  - Contribution from General Fund

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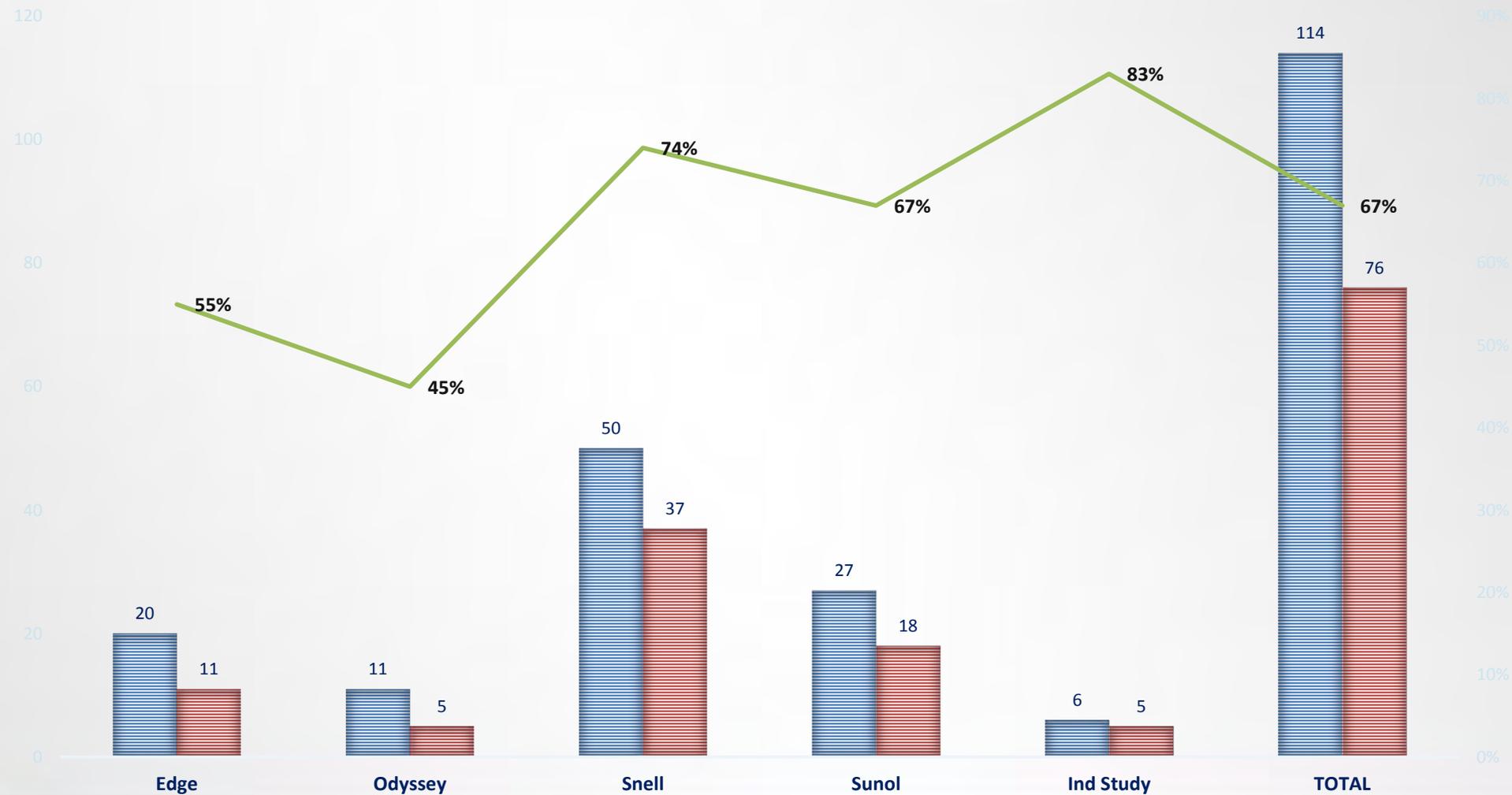Santa Clara County Alternative Education Total Enrollment 2011-2017

TOTAL NUMBER OF ALTERNATIVE EDUCATION ALLOTMENTS PER MOU
2011-2018

= 10 Students

Year	Allotments
2011-12	268
2012-13	239
2013-14	219
2014-15	207
2015-16	200
2016-17	158
2017-18	147

ENROLLMENT AND ATTENDANCE FOR COMMUNITY SCHOOLS
JANUARY 2017

Alternative Education Historical ADA

	2011-12 P-Annual	2012-13 P-Annual	2013-14 P-Annual	2014-15 P-Annual	2015-16 P-Annual	2016-17 P-Annual
Community Schools	294.22	237.74	238.91	157.30	123.27	83.10
Court Schools	247.93	231.12	238.76	188.29	158.54	115.21
Community Day Schools	19.86	32.74	0.00	0.00	0.00	0.00
Total AED ADA	**562.01**	**501.60**	**477.67**	**345.59**	**281.81**	**198.31**

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General Fund Contributions

Program	2017-18 Proposed Budget	2018-19 Projected Budget	2019-20 Projected Budget
Community Schools	$1,900,302	$1,974,757	$2,000840
Court Schools	$1,248,225	$1,218,440	$1,230,690
Total	$3,048,527	$3,193,197	$3,231,530

Opportunity Youth Academy (OYA)	**$1,296,107**	**$1,376,173**	**$1,392,554**

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Reasons for Declines

CDE and school districts implemented and support new strategies to keep children in schools

- "Restorative justice" programs
- Interventions that teach life skills, emotional control and improve school climate
- Passage of Assembly Bill 420 which limits suspensions/expulsions due to disruptive behavior
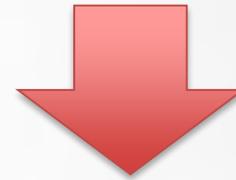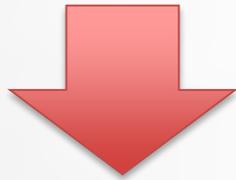
County-wide reductions in suspensions and expulsions between 2011-12 and 2014-15

- 31% reduction in suspensions
- 26% reduction in expulsions

Alternative Choices

- Court Schools are mandated

- Community Schools are options...

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AED Reorganization

- Next Steps
  - June 2018 Odyssey Closes
    - Meeting with South County Leadership on 9/25/17
    - due to excessive cost ($700,000 GF contribution)
    - Low enrollment
  - Collaborating with South County Districts to develop a plan for 2018-19
    - Bus students?
    - Support in district?
    - Or?

AED Reorganization Options

- Future **Options**…

- Allotments
  - Increase Allotments to reflect true cost of program
    - Current cost is $3,600 per seat
    - Projection of future allotments $16,335
  - Other COEs charge higher levels
    - SMCOE = $36,000
    - RCOE = $17,510
  - Placement & Overages fees
    - Per student placement
    - Additional seat cost when district place more then allotments
    - Compare the cost of ED Classrooms = $56,000 per student
    - Community School students have similar educational needs due to Environmental Conditions such as traumatic events, drug and alcohol, and additional social conditions that they are exposed to.

AED Reorganization Options

- Explore Minimize program
  - 2017-18
    - Current Program (Odyssey, Sunol, Edge/Peak, Snell)
    - Court Schools are mandated
    - Build county awareness of AED current conditions and collaborate on Alternatives to Alternatives
    - Update County Expulsion Plan 2018
  - 2018-19
    - Close Odyssey (will occur)
    - Focus on high school only? Or?
    - Potential reduction of services due to limited funding
  - 2019-20
    - Potential reduction of services due to limited funding

Visiting District and Community Partners

- Probation, Juvenile Judges, Department of Family and Children's Services, District Attorneys Office, Public Defenders Office, Alternative Defenders Office, Juvenile Justice Commission Officers, and other related partners (September – October)
- Morgan Hill Unified (9/25/17)
- Gilroy Unified (9/25/17)
- East Side Union High (10/11/17)
- Campbell Union High School District (T.B.D.)
- Santa Clara Unified School District (10/18/17)
- Milpitas Unified School District (T.B.D.)
- San Jose Unified (11/7/17)
- Smaller districts are invited to participate in *SCCOE Community School Restructure Summit* (11/14/17)

AED Reorganization Process

- District Leadership Team Visits District, Probation, and Community Partners to inform and engage in this collaborative partners

- SCCOE Community School Restructure Summit- November 14th @10-12 PM to explore learning, provide recommendations, and share next steps

- Request all District partners to return commitment letters by 1/31/2018

- Review feedback winter 2017-18 with SCCOE Leadership and adjust

- Next Steps…

Best Practices in School Budgeting

Government Finance Officers Association

October 19, 2017

Development

- **Best Practices in School Budgeting** developed by GFOA with input of several districts and other experts - http://gfoa.org/pk-12-budget

- **Smarter School Spending** initially developed in partnership with four districts - resource library of examples, tools, etc. - http://smarterschoolspending.org/

- **Award for Best Practices in School Budgeting** is a new GFOA budget award based on the Best Practices in School Budgeting - http://gfoa.org/school-budgeting

- **Alliance for Excellence in School Budgeting** is an early adopter group formed by GFOA to aid in implementing the new Best Practices - http://gfoa.org/alliance-excellence-school-budgeting

Need for Better Budgeting

- "Traditional" budget model
  - Incremental changes
  - Limited resources drive budget process
  - More reactionary than pro-active
  - Focus on current year challenges
- Need for better alignment of budget process and student achievement goals
  - Attempts likely made
  - Potential questions on sustainability

Key Features of Best Practices in School Budgeting

- More pro-active approach
- Strategic plan drives budget with focus on student achievement rather than limited resources
- Enhanced credibility
  - Continuous improvement principles
  - Strategic financial plan

Best Practices in School Budgeting

Focus on 5 Major Areas

1. Plan and Prepare
2. Set Instructional Priorities
3. Pay for Priorities
4. Implement Plan
5. Ensure Sustainability

Implementing the Best Practices

- Not meant as an outright replacement of existing budget process

- Framework to integrate current efforts to help move the bar forward

- Way to help identify areas that may need improvement

- Not a linear path - focus on areas of most immediate benefit to gain quick wins

Before Diving into the Framework…

- Quick self-assessment of how your current budget process works:
  - What works well?
  - What doesn't work so well?
  - What would you like to see improved?
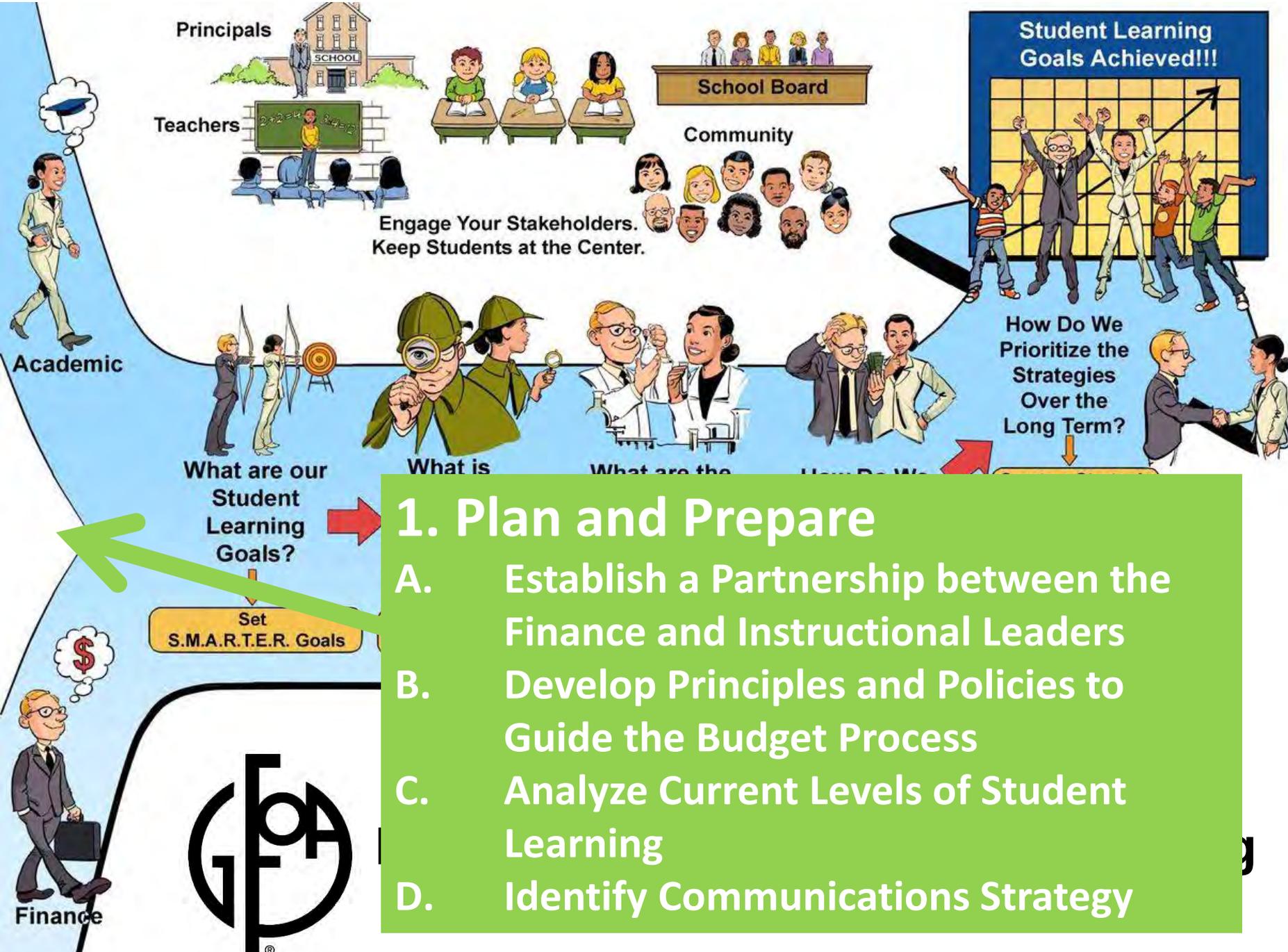 - What do you think your non-finance colleagues would like to see improved?

1-2-4-All

- Steps
  - Silent self-reflection – 1 minute
  - Expand on your ideas in pairs – 2 minutes
  - Share & develop ideas in foursome – 4 minutes
  - Each group shares at least one important idea with all

How to Begin

- **Emphasis on planning and setting the stage**
  - Collaboration
  - Framing the process
  - Baseline performance
  - Engagement

Principals

Teachers

School Board

Community

Engage Your Stakeholders.
Keep Students at the Center.

Student Learning
Goals Achieved!!!

Academic

What are our Student Learning Goals?

Set S.M.A.R.T.E.R. Goals

Finance

What is

What are the

How Do We

How Do We Prioritize the Strategies Over the Long Term?

1. Plan and Prepare

A.   Establish a Partnership between the Finance and Instructional Leaders

B.   Develop Principles and Policies to Guide the Budget Process

C.   Analyze Current Levels of Student Learning
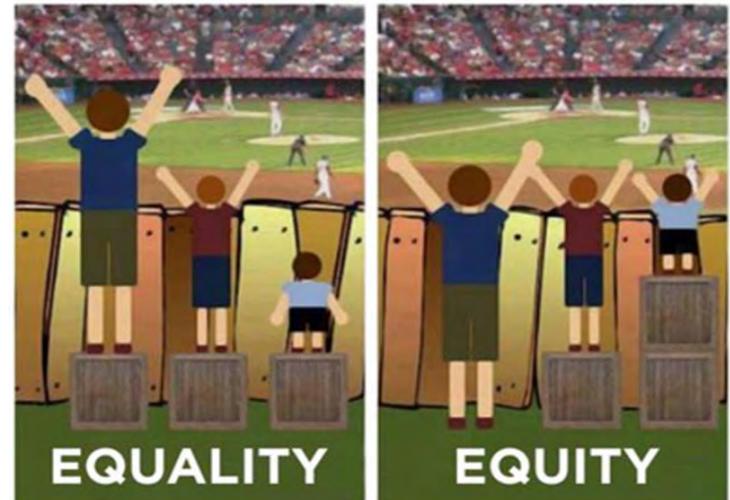
D.   Identify Communications Strategy

Establish a Partnership between the Finance and Instructional Leaders

- Collaboration between the academic and financial leadership of a district is key to the Best Practices in School Budgeting
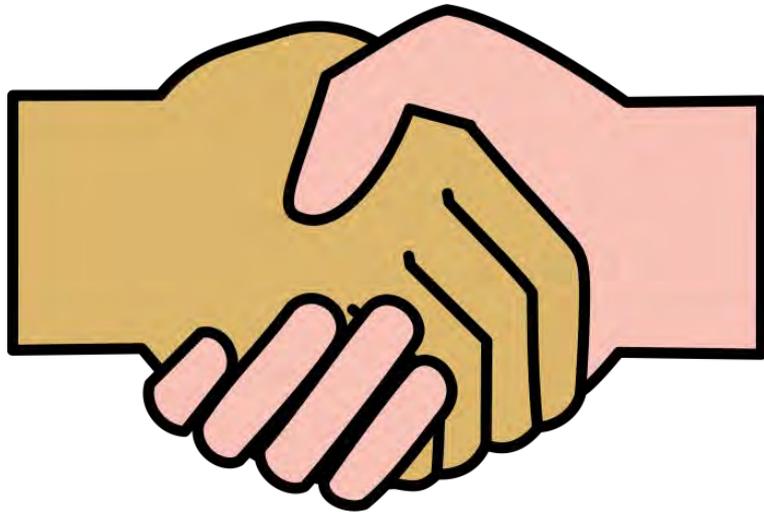
Developing Budget Principles

- Use as a way to set tone/change culture
  - Focus on students
  - Data
  - Cost-effectiveness
  - Equity
  - Long-term
  - Transparency

Identify Communications Strategy

- **Communication strategy components:**
  - Process overview
  - Explanation of decisions
  - Stakeholder engagement
- **Implement communication strategy**
  - Identify the messengers
  - Identify target audience and tailor messages
  - Select communication channels
  - Gather feedback and adjust

District Examples

- **Beaverton School District, OR**
  - Partnership took time and conscious effort
  - Lead with academics, not finance
  - Levels of implementation
- **Traverse City Area Public Schools, MI**
  - Use best practices as district principles
  - Makes decisions better, not easier
 - Culture trumps strategy
  - Make connections at relatable level

http://smarterschoolspending.org/resources/district-examples/beaverton-school-district-academic-partnerships-case-study
http://smarterschoolspending.org/resources/district-examples/traverse-city-area-public-schools-principles-policies-

Second – What is the Focus

- **Establishing direction**
  - Goal-setting
  - Deep dive on issues
  - Develop strategies
  - Prioritization
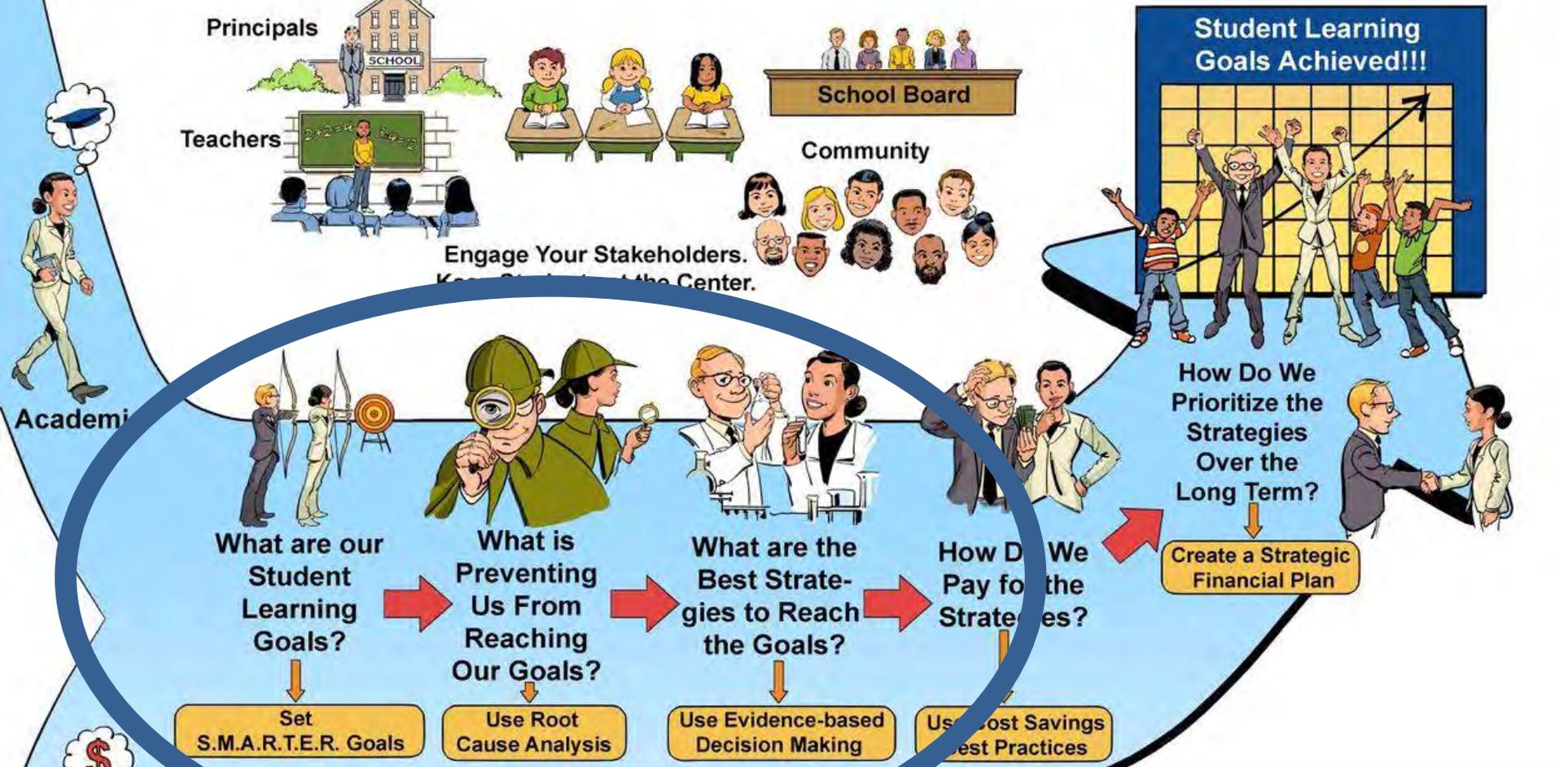
2. Set Instructional Priorities

A. Develop Goals
B. Identify Root Cause of Gap between Goal and Current State
C. Research and Develop Potential Instructional Priorities
D. Evaluate Choices amongst Instructional Priorities

Develop Goals

- **SMARTER** framework:
  - **<u>S</u>pecific** - precise outcome or result
  - **<u>M</u>easureable** - verifiable, ideally quantifiable
  - **<u>A</u>chievable** - grounded in reality
  - **<u>R</u>elevant** - focused on student achievement
  - **<u>T</u>ime-bound** - short and long-term objectives
  - **<u>E</u>ngaging** - reach for ambitious improvement
  - **<u>R</u>esourced** - finances aligned with goals

Example: Lake County Schools, Florida

Major Goal: Immediate Investment in Struggling Students

Specific - Adds Precision to the Major Goal

Sub-Goal: ELL Students: Fund programs aimed at closing the achievement gap of English Language Learner (ELL) students

Relevant – says why this goal matters

What is the need? LCS spends less on ELL students than comparison districts. The LCS ELL population is growing steadily as the student achievement rates continue to be low

Example: Lake County Schools, Florida

What will the District do?

- Determine programming options
- Compare options by potential A-ROI
- Select highest return option(s)

Resourced – Est. cost for budget

What will it cost?

Year 1	Year 2	Year 3
$1.9 million	$2 million	$2 million

Measureable, Time-bound, & Engaging

What gains does the district expect?

Measure	Proj. '15	Act. '15	Goal '16	Goal '17	Goal '18	Goal '19
ELL Grad. Rate	70%	57%	70%	80%	90%	95%

Root Cause Analysis Example

	A Root Cause Analysis on Special Education from Beaverton
⬇	**Q.** Why are so few 8th graders who receive special education not meeting State standards? **A.** They are not prepared to meet the standards.
⬇	**Q.** Why are they not prepared to meet the standards? **A**. They lack access to appropriate instruction in grade level content.
⬇	**Q**. Why are they not participating in general education classes, where they can get instruction in grade level content? **A.** The general education teacher may not have the tools or skills to address behavioral needs and scaffold instruction.
⬇	**Q**. Why do general education teachers feel unprepared to instruct students who receive special education services? **A.** Professional development for general education teachers may not support how to instruct students with varied learning and behavioral needs.
⬇	**Q**. Why doesn't professional development support these skills? **A**. The budget for professional development to support special education students is provided exclusively by the special education department, which only trains special education teachers.
!	**Solution:** We need to change the budget so that professional development for helping special education students goes to all teachers, not just special education teachers.

http://smarterschoolspending.org/resources/district-examples/beaverton-school-district-root-cause-analysis-case-study

Research & Develop Potential Instructional Priorities

- ■ What is an instructional priority?
  - • *Strategy for overcoming identified problems and achieving stated goals*

| Inputs | → | Activities/ Strategies | → | Outputs |

- ■ How to research and develop instructional priorities?
  - • Look at proven practices
  - • Guidelines for development

Evaluate Choices between Instructional Priorities

- Identify and describe the options
  - Does the option meet the guidelines?
  - Reduce/organize options
- Consequences of decisions
  - Impact, affordability, feasibility, support
- Public engagement/support

District Examples

- Lake County Schools, FL
  - Limit the number of goals
  - Maintain some consistency in goals
- Beaverton School District, OR
  - Find root causes and address them
  - Use pilot programs

http://smarterschoolspending.org/resources/district-examples/lake-county-school-district-smarter-goals-case-study
http://smarterschoolspending.org/resources/district-examples/beaverton-school-district-instructional-priority-development-case-study

Third – How to Fund

- **Allocating/finding resources**
  - Analyzing current programs
  - Evaluating new proposals

Principals

Teachers

Engage Your Stakeholders.
Keep Students at the Center.

School Board

Community

Student Learning
Goals Achieved!!!

Academic

What are our
Student
Learning
Goals?

What is
Preventing
Us From
Reaching
Our Goals?

What are the
Best Strate
gies to Reach
the Goals?

How Do We
Pay for the
Strategies?

How Do We
Prioritize the
Strategies
Over the
Long Term?

Set
S.M.A.R.T.E.R. Goals

Use Root
Cause Analysis

Use Evidence-based
Decision Making

Use Cost Savings
Best Practices

Create a Strategic
Financial Plan

Finance

3. Pay for Priorities

A.   Applying Cost Analysis to the Budget Process

B.   Evaluate & Prioritize Use of Resources to Enact the Instructional Priorities

Apply Cost Analysis to the Budget

- Types:
  - Staffing analysis
  - Per unit costs
  - Cost per outcome
  - Relative cost per outcome
  - Academic return on investment (A-ROI)
- **But** – understanding the need for pairing context with analytical results
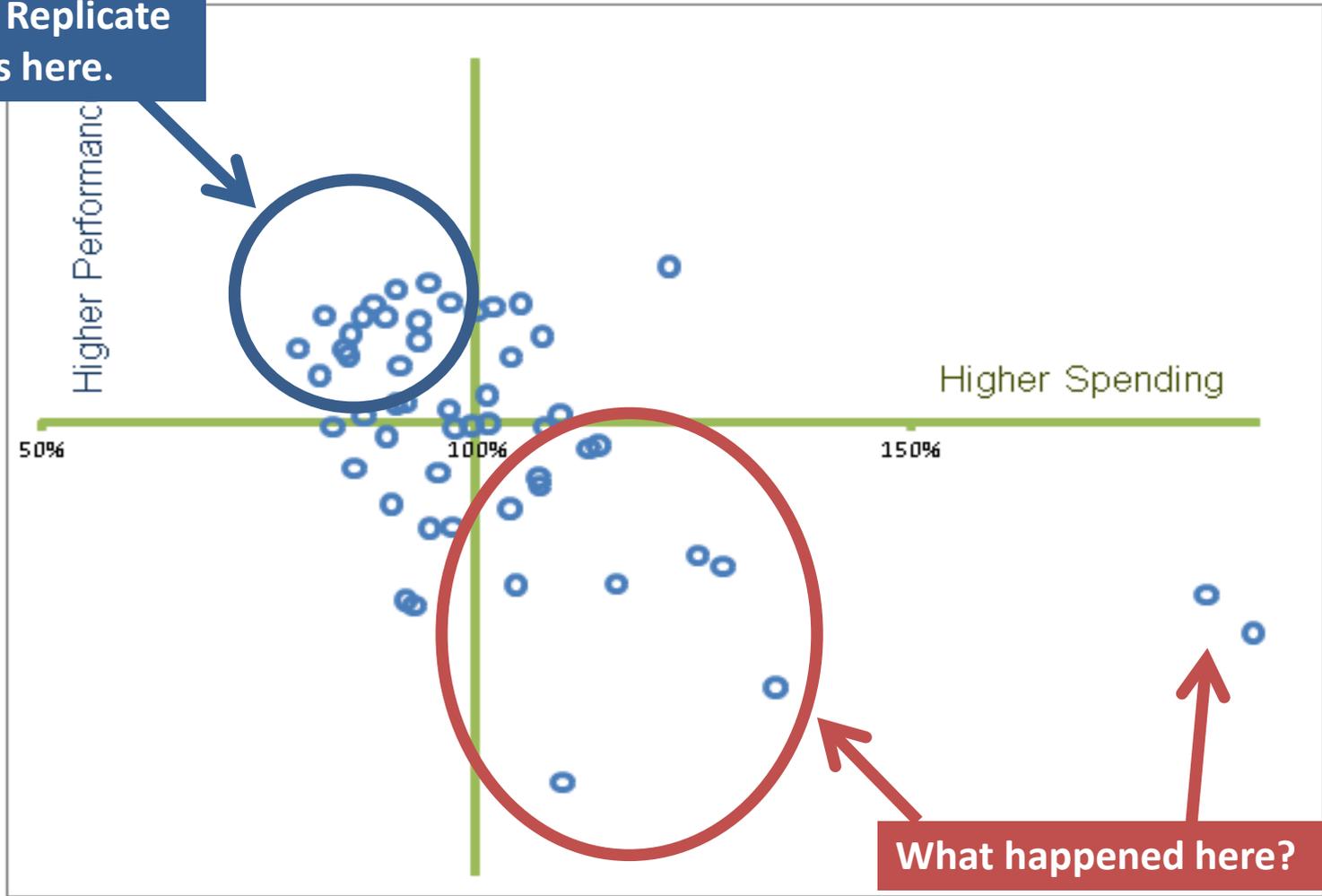
Relative Cost Per Outcome

Evaluate & Prioritize Expenditures to Enact the Instructional Priorities

- **Finding resources**
  - Revenues, sunset existing programs, efficiencies

- **Weighing trade-offs**
  - Consistent criteria, transparent scoring, data

- **Overcoming constraints**
  - Funding limitations, legal issues, culture, contracts

District Examples

- Lake County Schools, FL
  - Quantitative data as clue – not necessarily a conclusion
  - Diverse portfolio of strategies
- Traverse City Area Public Schools, MI
  - Cost effectiveness as a principle
  - Multiple data points
  - Do not let the perfect become the enemy of the good.

http://smarterschoolspending.org/resources/district-examples/lake-county-school-district-pay-priorities-case-study
http://smarterschoolspending.org/resources/district-examples/traverse-city-area-public-schools-academic-roi-case-study

Next – Put Plans to Action

- **Implementing with fidelity**
  - Financially
  - Clear steps/responsibilities for implementation
  - Impacts to school sites
  - Communicating through the budget

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Student Learning
Goals Achieved!!!

Academic

Finance

What are our Student Learning Goals? → What is Preventing Us From Reaching Our Goals? → What are the Best Strategies to Reach the Goals? → How Do We Pay for the Strategies?

Set S.M.A.R.T.E.R. Goals

Use Root Cause Analysis

Use Evidence-based Decision Making

Use Cost Savings Best Practices

How Do We Prioritize the Strategies Over the Long Term?

Create a Strategic Financial Plan

4. Implement Plan

A. Develop a Strategic Financial Plan
B. Develop a Plan of Action
C. Allocate Resources to Individual School Sites
D. Develop Budget Presentation

Develop a Strategic Financial Plan

- Financial in nature – but needs to provide greater picture

- Goals and strategies of organization inform financial future – not just external factors

- Prepare for future as best as possible – as opposed to simply reacting to foreseeable events

In order to balance the 2016-2017 budget and fund the instructional priorities, the district will take action to realign approximately $7.6 million

Realignment Opportunities

	2016–17
Shift of expenses out of general fund ($M)	
Capital expenditures	2.5
Realignments within general fund ($M)	
High school schedule	4.7
Consolidated purchasing	0.6
IDEA funding (non-recurring)	0
Maintenance: lawn care	0
Management discretion	0.5
Transportation	0.3
Administrative salaries	0.4
Athletics transportation	0.1
Clerical	TBD
Guidance Counselors	TBD
Additional Savings	
Self-funding Prof. Development	1.3
Total Savings	**10.4**

Investment Opportunities

Area	2016-17
Baseline ($M)	
Surplus (gap)	(1.3)
IP Costs ($M)	
Roll forward from previous year	2.5
ELL and Struggling Students & Schools	(1.9)
Investment in People	(1.8)
Teacher Induction & Coaching	(0.4)
Leadership Advancement	(0.2)
Program Evaluation & Innovation	(0.2)
Pers. Learning (Teachers/Leaders)	(1.0)
Pers. Learning (Students)	(1.8)
Total: Priorities only	(7.3)
Addition: HS Testing/Super	(0.5)
Addition: Academic Tutors	(0.8)
Addition: IB Planning	(0.2)
Total including baseline gap	(7.6)

With the 2016-17 balanced budget as described, $4.0 M in 2017-2018 and $6.6M in 2018-19 remain as budget gaps to be filled

Options currently being evaluated to fill the future budget deficits:

- School models: Examine magnet school models, Collegiate H.S., School Choice, CTE Academies, etc.
- IDEA efficiencies: Pursue additional reimbursements and evaluate efficiencies of staffing placement; ongoing study needed for any changes, data available supports current status
- District staffing: Examine roles and responsibilities of district-level positions
- Central Office for district staff: Explore costs and efficiencies gained from a centralized location for district departments

Lake County Schools, Florida

Strategic Financial Plan

http://smarterschoolspending.org/resources/district-examples/lake-county-school-strategic-financial-plan

AND

http://smarterschoolspending.org/resources/district-examples/lake-county-school-district-strategic-financial-plan-case-study

Develop a Plan of Action

- Taking the steps to ensure instructional priorities are successful
- The following elements should be included in the plan of action:
  - Instructional priorities
  - How the priorities will be funded
  - Actions intended to implement and fund priorities
  - Sponsorship structure
  - Sources of evidence that action is occurring
 - Process for review and adjustment

Develop Budget Presentation

- Fundamental organization of the budget:
  - The Challenges
  - Goals – remember SMARTER framework
  - Strategies and programs
  - Financial plan
  - Risks to long-range financial sustainability
- Telling the district's story
- Use as a communication/engagement device

District Example – Budget Document

The Challenges Faced by Goochland County Public Schools

Goochland County is rural with a diverse racial/socioeconomic mix over a large geographic area with limited Internet access
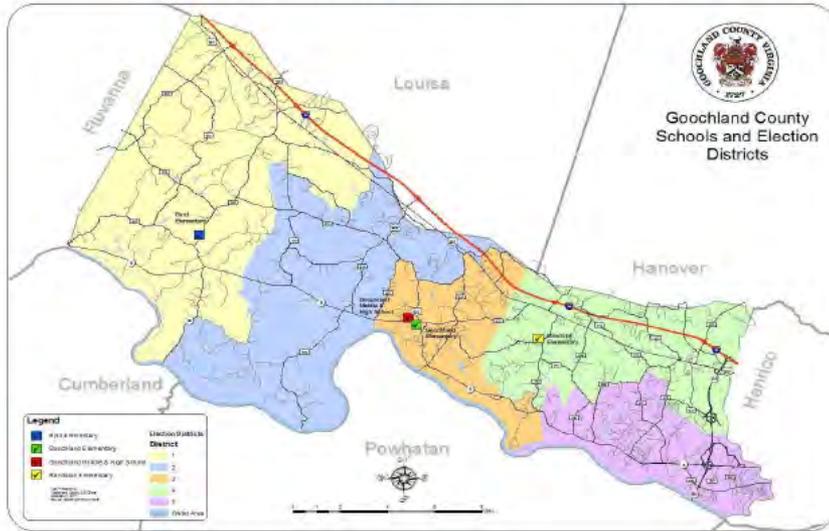
Goochland County is in the eastern Piedmont of Central Virginia between the Cities of Richmond and Charlottesville. The County is 281 square miles in a narrow band, 37 miles long with the James River to the south and Interstate 64 to the north. The population is approximately 22,300 with 77% White, 18% African

Percent of Population Living Below 100% Poverty Level, Goochland, 2015
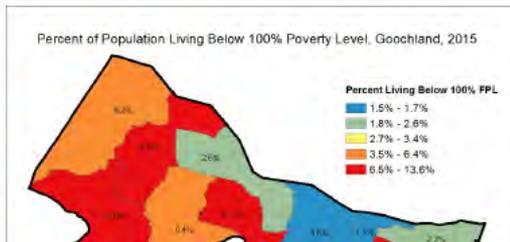
Responses to Challenges faced by GCPS

Inspire 2020 (Goochland 6-year Strategic Plan)

Following a series of staff, community and school-based meetings, the strategic plan was developed and adopted by the School Board on December 10, 2013.

Vision: Inspiring the next generation to make a positive impact
Mission: To maximize the potential of every learner
Core values: Excellence, Creativity, Courage, Honor and Optimism

This plan is organized around three major goals:

Goal 1: Prepared for Life through Deeper Learning (to maximize each student's academic potential through engaging experiences and deeper learning, preparing our students for the challenges of learning and working in the modern global economy)

Goal 2: Improved School Climate (to improve the climate of our organization and create opportunities for meaningful stakeholder engagement)

Goal 3: Safe Schools with Effective Management (to maximize resources for instruction by providing safe, efficient, and transparent operations for all stakeholders while effectively managing our facilities and programs)

The strategic plan is referenced as a master document in the regular creation and update of *tactics*, which are presented monthly to the School Board. It is also referenced in each school's annual *school improvement plan* (that have specific, targeted goals for the year, as referenced below, and is one of the elements for the annual teacher strategic compensation bonus). The plan is used for identifying annual budget priorities for the upcoming year, based upon the division's changing needs, priorities, and adherence to its progress in the strategic plan. This is seen throughout this document.

Our most recent tactical reports are available below. They are collaboratively updated and written by the School Leadership in consultation with their team members. Tactical progress is monitored at every regular school board meeting.

December, 2016 Tactical Report	November, 2016 Tactical Report	October, 2016 Tactical Report	September, 2016 Tactical Report

https://docs.google.com/document/d/1E5n3RCKJutRo2ck1cun_QZ4sc6D_-pLcWKBlvge4WGA/edit#heading=h.17dp8vu
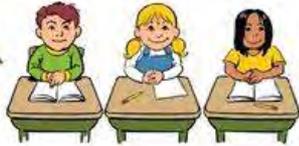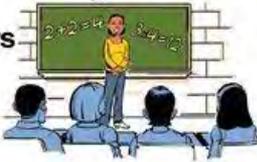
Finally - Sustaining

- **Measuring results and evaluating the process**

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Use Root
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Create a Strategic
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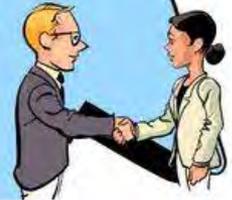
5. Ensure Sustainability
A. Put the Strategies into Practice and Evaluate Results

Other Items/Upcoming Events

- Other GFOA initiatives:
  - State and Local Tax Deduction information
    - http://www.gfoa.org/salt
  - #builtbybonds
    - http://www.gfoa.org/municipal-bond-resource-center
- Alliance for Excellence in School Budgeting
  - Next kick off November 2-3, 2017 in Chicago
  - If interested - http://www.gfoa.org/training/19331
  - Preconference session May 4, 2018 in St. Louis
  - 2018 kick off in Chicago next fall

Questions?

- Contact:
  Matt Bubness, Senior Manager
  Government Finance Officers Association
  Research & Consulting Center
  mbubness@gfoa.org
  312-578-2267

Santa Clara County Office of Education
Chief Business Officers' Meeting

Presented by

Michelle McKay Underwood
Director, Governmental Relations

October 19, 2017

School
Services
of **C**alifornia
INC. ™
An Employee-Owned Company

Topics for Consideration

- Cap on District Reserves **–** Senate Bill (SB) 751

- Major Legislation for 2018?

- 2018-19 State Budget Issues

Cap on District Reserves
SB 751

Cap on District Reserves

- Ever since the Legislature enacted the cap on district reserves in the 2014-15 Budget Act, there has been an effort to repeal or amend this misguided policy
- California School Boards Association (CSBA) had taken the lead in seeking **changes to the reserve cap language, falling short in last year's legislative** session
- This year CSBA and California Teachers Association negotiated changes to the reserve cap, amending the conditions under which the cap is triggered and raising the cap
  - ❑ The compromise measure is SB 751 (Hill, D-San Mateo)
  - ❑ **The bill received no "no" votes throughout the legislative process**
  - ❑ The Governor signed the bill on October 11
    - o A technical amendment will be needed next year regarding the application of the 10% cap so that the bill is implemented as intended

What Changes Does SB 751 Make?   4

- What changes will be made to the cap provisions?

  - ❑ Increases the cap from being based on the average daily attendance (ADA) of the district (6% for most districts) to 10% of the combined assigned and unassigned ending balance for all districts

  - ❑ Imposes the cap in the year following the year in which contributions to the Proposition 98 reserve equals or exceeds 3% of the Proposition 98 funding level provided for K-12 education; currently the cap is triggered in the year following _any_ contribution to the Proposition 98 reserve

  - ❑ Exempts from the reserve cap basic aid districts and districts with fewer than 2,501 ADA

    - o About 600 districts will be exempt under these criteria

- Other than the technical change, this is likely the end of the legislative debate on the cap
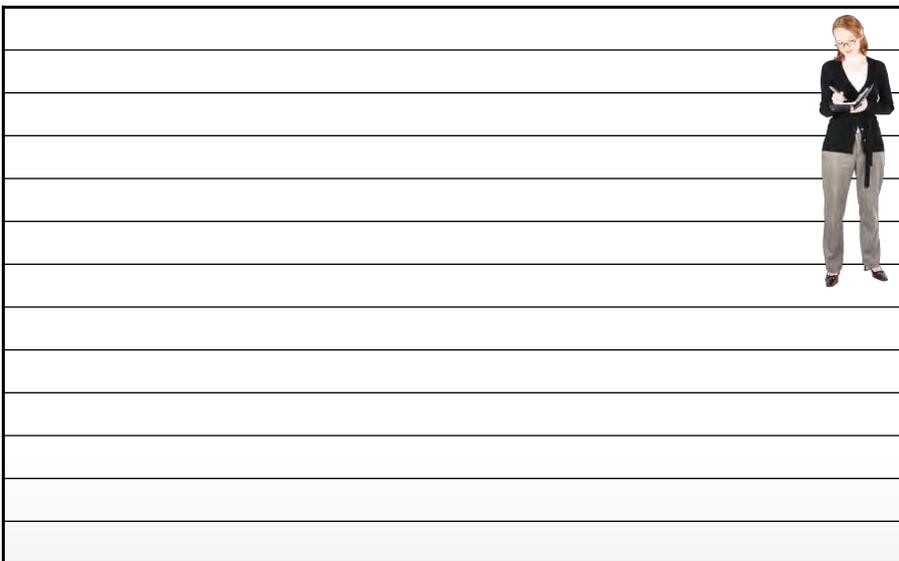
Notes   5

Major Legislation for 2018?

Fiscal Bills Sent to the Governor in 2017, but Vetoed

- SB 527 (Galgiani, D-Stockton) **–** Beginning in 2018-19, would have provided an annual cost-of-living adjustment (COLA) to funding that school districts and county offices of education receive from the Home-to-School Transportation program
  - ❑ Vetoed by the Governor, who stated: **"While** I recognize the increasing call on local resources for competing priorities and the importance of providing student transportation, the [LCFF] provides . . . substantial flexibility and autonomy to implement and augment programs that meet the educational needs of their students and local communities**."**
- Assembly Bill (AB) 568 (Gonzalez Fletcher, D-San Diego) **–** Would have required districts and charter schools to provide at least six weeks of paid maternity leave
  - ❑ Vetoed by the Governor, who cited recently approved differential pay **leave bills and stated: "I believe further decisions regarding leave policies** for school employees are best resolved through the collective bargaining **process at the local level."**

Fiscal Bills Sent to the Governor in 2017, but Vetoed

8

- AB 621 (Bocanegra, D-San Fernando) **–** Commencing in 2018-19, would have authorized classified employees whose district employer does not pay salaries in 12 equal monthly payments to participate in the Classified School Employees Summer Furlough Fund; required the district employer to deposit amounts withheld in a special account; and required the state to match contributions $2 for each $1 deposited

  ❑ Vetoed by the Governor, who stated**: "Employee compensation is a matter** subject to local collective bargaining. This bill reduces the flexibility of local educational agencies and bargaining units to agree on employee compensation in a manner that reflects local needs, resources and priorities**."**

Bills That Failed Passage in 2017

9

- AB 1217 (Bocanegra, D-San Fernando) **–** Would have established a state school located in Los Angeles County to provide instruction in science, technology, engineering, and mathematics to historically underrepresented pupils in grades 6 to 12, inclusive

- SB 328 (Portantino, D-La Cañada Flintridge) **–** Would have prohibited local education agencies from beginning the school day for middle schools and high schools earlier than 8:30 a.m.

2018-19 State Budget Issues

2017-18 State Revenue Update   11

- September 2017 revenues beat the forecast by 1.8%
  - ❑ Big three taxes
    - ○ Personal income tax up $9 million
    - ○ Corporation tax up $125 million
    - ○ Sales tax up $5 million
- Year-to-date revenues are up about $666 million
  - ❑ Significantly better than last year at this time, when year-to-date revenues were down by $217 million and the prior year closed out short $700 million

Proposition 98 and LCFF
12

- If the 2017-**18 Budget Act revenues meet the forecast level, the Governor's** final Budget may get close to reaching full implementation of the LCFF in 2018-19

  - ❑ The remaining LCFF gap is about $3 billion

  - ❑ The Department of Finance projects about $1.9 billion for gap closure in 2018-19

    - ○ **This provides about $316 per ADA for the "average" district**

  - ❑ About $750 million is needed to fund a 1% COLA and we estimate the COLA to be about 2.15% in 2018-19, requiring about $1.6 billion

- The early outlook is that districts will get a little more than COLA next year if current forecasts are realized

Career Technical Education
13

- This year has the final installment of funding for the Career Technical Education Incentive Grant (CTEIG) at $2 for every $1 provided by the state

  - ❑ After that, schools will be responsible to maintain the programs that were funded with the CTEIG

- This month, the Assembly Budget Subcommittee on Education and other policy committees met to discuss the need for continued dedicated funding for career technical education

  - ❑ Another hearing will be held after Governor Brown releases his 2018-19 State Budget proposal in January 2018

Special Education 14

- In 2017, the Brown Administration engaged stakeholders during the Budget process to get feedback on the current special education finance system and the recommendations included in the November 2016 Public Policy Institute of California (PPIC) report and October 2015 California Special Education Task Force report

- Ultimately, no proposal was included at the May Revision or in the final State Budget

- Since, State Board of Education President Michael Kirst has continued to **call for special education changes, most recently at this month's** EdSource Symposium

  ❑ From his speech, it is unclear whether finance reform or other types of reform – for example to address the special education teacher shortage – should be expected from the Administration next year

Pension Costs? 15

- **One of the largest single expenses in the average school district's multiyear** projection is the cost of the employer contribution to employee retirement programs

  ❑ So far, the state has not granted relief to school agencies and has been reluctant to discuss the issue

    o About 25% of the Local Control Funding Formula restoration dollars, $4.5 billion, will go to retirement costs, not student programs or salaries

- There has been increasing acknowledgment of the escalating cost of pensions, and there is hope that the issue may be moving closer to being addressed

Santa Clara County Office of Education

Technology Services Branch

Technology Resources Advisors (TRA)

Brenda Harris
Retiring

Delma Davis
Retiring

Rhonda Ramirez
Payroll – District/System

Marie Sequeira
Payroll – District Focus

Richard Aldover
Finance and Budget

Lydia Cabrera
Systems and Security

Allen Tang
HR ++

Govind Walia
Purchasing

Chris Dea
Systems and Security

FY2017 Review

- Current Number of Business System Users: 2,127
- Current Number of ESS Users: 10,534

FY2017

- Direct Deposits Processed: 262,310
- Payroll Warrants Processed: 67,601
- AP Warrants Processed: 130,631
- W2 forms Processed: 34,757

ERP Usage – Santa Clara

Personnel
100%	Human Res.	
59%	Absence Tr.	
100%	Payroll	
28%	Position Cont.	

Finance
100%	General Ledger
100%	Accounts Payable
25%	Accounts Rec.
84%	Budget Dev.
88%	Budget Control

Purchasing
41%	Site based/Remote
47%	Req. Routing/Rule Based
31%	Fixed Assets
28%	Warehouse (Stores Inv)

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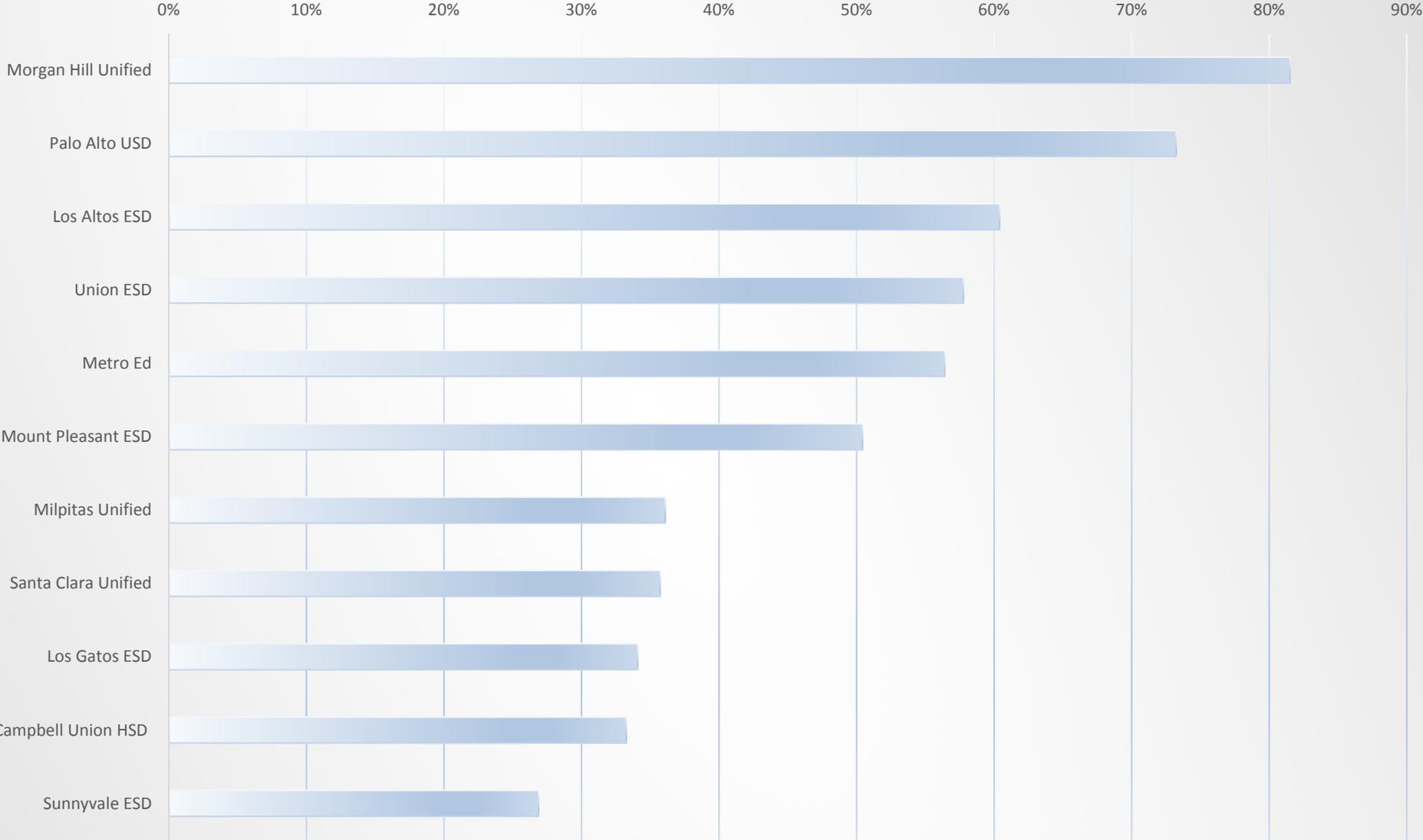
ERP – What's New

General Ledger/Budget

- Accounts Receivable
- Accounts Payable
  - AP copies in LF
  - Integration with Colbi Technologies
  - ACH for AP
  - Bulk imports
  - PV imports
- Budget Actions

Purchasing

  - Attachments
  - Migrating to Requisition Routing
  - Work Flow comes to POCO
- Fixed Assets
  - Import, more reports
- Stores/Warehouse

Enterprise Resource Planning - ERP

Payroll

- – Import/Export
- – Integration with Veritime
- • Benefits Management
  - – History
  - – Integration with Accounts Receivable
  - – Integration with American Fidelity…. And more

Human Resources

- – Employee Self Service Core
  - • Everyone has access
  - • Forgot UserID Function
- – ESS –Absence Request
  - • Workflow (need volunteers)

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Enterprise Resource Planning - ERP

- Retirement – PERS/STRS
  - Ouch
    - Ouch
      - Ouch
        - » Ouch
          - Ouch
            - Ouch
              - Ouch
                - Ouch

HR Core Data for Districts

Current Organic Growth

- Core Data is extracted from QSS and placed on a sFTP server each night

- District can choose to use this data for district level automation or other district functions

- Of course there is paperwork and red tape

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Core Data Access

Core Data access is a service providing districts with data from the Personnel/Payroll table in the QCC database. This service includes a daily snapshot of a district's data entered into QCC. The data can be downloaded via secure FTP. The information below includes an overview, security form and data dictionary. Please contact the TSB Help Desk for more information.

HR Core Data Guidelines

Overview

HR Core Data for Districts provides sensitive HR data to districts to use to update other systems within their districts which require Human Resource demographic data. This allows the district to use QSS as the system of record and avoid dual data entry. Examples of systems that might be updated with this information include substitute management systems, time and attendance systems, and student information systems. This data is used at the Districts discretion.

Process

Data is provided nightly in a batch process. District data remains separate at all times. TSB provides a secure FTP server for each district as the delivery point. Data is extracted from QSS during the nightly maintenance cycle into a semicolon delimited file unique to each district. These files are moved to the separate sFTP servers for each district, ready for district use.

Two files will be uploaded to the sFTP server: perpay and perpay.txt. These files are

CORE DATA ACCESS ENROLLMENT FORM - 2017

DISTRICT IT STAFF, READ FIRST: Before you complete this form, please take careful consideration into deciding the district staff who will have access to your district's Core Data. This form designates which district staff will be provided access to the district's Core Data and associated files via FTP server.

- This form must be **typewritten** and **signed by a District Authorized Signer** in order for TSB to process.

REASON FOR ENROLLMENT FORM SUBMISSION:

☐ NEW ☐ UPDATE (Any changes to "Who I want to give access to district Core Data to:")

I, _____ (Authorized Signer Name), authorize enrollment of my district in the Core Data program from TSB. I request and authorize access to the Core Data, associated data files, and FTP account information for _____ (District Name) be provided to the following individual(s) specified in "**Who I want to give access to district Core Data to:**" section below.

Who I want to give access to district Core Data to:		
Name: _____	Employee Number: _____	
E-mail: _____	Phone: _____	Position: _____
Name: _____	Employee Number: _____	
E-mail: _____	Phone: _____	Position: _____
Name: _____	Employee Number: _____	
E-mail: _____	Phone: _____	Position: _____

By signing this form, District Authorized Signer understands:

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Desktop Options

- Fat Client
  - Windows Only
  - Significant Hardware needed
- District Virtual Desktop
  - Only works on district network

Desktop Options

- Executive Desktop*
  - Complete working environment
  - Roaming
  - 2 no cost accounts provided
    - Decommissioning cloudzone
  - Additional accounts $275/name account/year

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Also new…

- Business System Onboarding
  - Guide
  - Enrollment in class
  - Beginning QSS class available every month

Also new..........

- Unemployment interface using LF
- LF pre-boarding
- New closing schedule
- Possible new ticketing system

We need volunteers

- Afcomply – open enrollment upload
- Colbi Technologies
- Veritime
- What else?

W2 Ideas

- Have the SCCOE print shop mail them for you (contact Lee Blevins 408-453-6988)
- Electronic Delivery consent
  - https://www.irs.gov/pub/irs-pdf/p1141.pdf
  - Page 16

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Yes – we print your 1095Cs!

Please let us know if you will utilize this service

Thank you!

Employee **Self Service**

Technology Services
Santa Clara County
Office of Education

Register to view your
personal and payroll records online.

REGISTRATION REQUIREMENTS

- SCHOOL DISTRICT EMPLOYEE WITHIN SANTA CLARA OR SAN BENITO COUNTIES

- EMAIL ACCOUNT

- LAST 4 DIGITS OF SOCIAL SSN

- EXTERNAL REFERENCE NUMBER

Employee Self Service

ACCESS TO YOUR PERSONAL AND PAYROLL RECORDS

How to Register

VISIT WEBSITE

STEP 1: VISIT WEBSITE

Go to ess.sccoe.org *

Click Register

Enter email address

Click Start registration

* San Benito users must go to ess.sbcoe.org

STEP 2: VERIFY EMAIL ADDRESS

Log onto your email account

Locate confirmation email

Click link located within confirmation email

VERIFY EMAIL ADDRESS

From: Help_Desk@sccoe.org [mailto:Help_Desk@sccoe.org]
Sent: Friday, June 14, 2013 5:23 AM
To: John Doe
Subject: Confirmation for new ESS user

You requested to register with ESS on Fri, Jun 14, 2013 at 05:22am.
If you did not make this request please save this email and contact your Support or Help desk.

To complete ESS registration click the link below and follow the instructions:

https://ess.sccoe.org/users/new?complete_reg=Y&

If you have any questions or problems please contact your ESS support center.

Thank You

COMPLETE STAFF REGISTRATION FORM

STEP 3: COMPLETE STAFF REGISTRATION FORM

Enter required fields**

Click Submit Registration.

REGISTRATION FORM INSTRUCTIONS

1. Change District to reflect your employer.
2. Select your district from the pull-down menu.
3. Enter the last 4-digits of SSN.
4. Select the month, day, and year from the Birth Date pull-down menu.
5. Enter your external reference number. *(This number can often be found on your paycheck stub.)*
6. Skip the Work email field. This field is read-only. It displays the email account used during registration.
7. Enter username, using at least 3 characters.
8. Enter password.
9. Confirm password.
10. Select a challenge question from the pull-down menu, which will be used to recover your account information if you forget your username or password.
11. Enter the answer to the challenge question.
12. Click Complete Registration.

Registering for ESS (Employee Self Service)

> **Information you will need:**
> ✓ The last four digits of your Social Security Number
> ✓ Your employee number, found in the upper corner of your pay stub
> ✓ Your birth date
> ✓ A unique login name and a password that you create

1) On an Internet browser, go to **ess.sccoe.org**

2) Check that your district number is in the menu bar in the upper right.
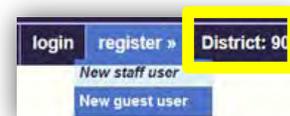
3) Click on the word **REGISTER** in the menu bar or left pane and select **New Staff User**.

4) On the Staff Pre-Registration Form, type in your work email. You may enter your district email address (preferable) or use one of these external email addresses: AOL, COMCAST, GMAIL, HOTMAIL, LIVE, ATT, and YAHOO.

5) Click the **Start Registration** button. You are now returned to the ESS home page with a message that directs you to check your email in order to complete the registration process

6) Log into your email. Open the email from the Help Desk and click on the **hyperlinked** internet address. It will automatically take you to a new ESS registration page.

7) Complete the registration page. Here are a few TIPS:
   - "Work Email" must be the same email you entered on the pre-registration page.
   - Login Name & Password: We suggest using your district email USER ID that you use for email –and that same password (one less user ID & password to remember).
   - Each must be least 5 characters long and a maximum of 30 characters.
   - The Challenge Question will appear if you log in and need password assistance – to make sure it's really you. So make sure your question and answer are something you will remember.

8) After submitting the registration, you can log in to ESS (*ess.sccoe.org*).

☞ If you forget your password, click the forget password link and answer your challenge question. A temporary password will be sent to the email on file.

☞ Remember to always logout and keep your info secure by clicking **Logout** in the upper right corner.

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Registrarse para ESS (Employee Self Service)

> Información que se necesita:
> - ✓ Los últimos cuatro dígitos de su número de la Seguro Social
> - ✓ Su número de empleado, se encuentra en la parte superior de su talon de cheque
> - ✓ Su fecha de nacimiento
> - ✓ Un nombre de acceso único y una contraseña que crea para usted

1) En un navegador de Internet, vaya a **ess.sccoe.org**

2) Compruebe que su número de distrito está en la barra de menú en la parte superior derecha. **SCCOE = 90**

3) Haga clic en la palabra **REGISTER** en la barra de menús o el panel izquierdo y seleccione **New Staff User**.

4) En el **Staff Pre-Registration Form,** escriba su correo electrónico de trabajo. Para SCCOE personal, generalmente y preferentemente, que será su PRIMER NOMBRE, subrayado, EL APELLIDO, el signo @, **SCCOE.ORG**. Puede introducir una dirección de correo electrónico del distrito o utilizar una de estas direcciones de correo electrónico externa: AOL, COMCAST, GMAIL, HOTMAIL, LIVE, ATT, and YAHOO.

5) Haga clic en el botón **Start Registration**. Ahora regresará a la página de inicio ESS con un mensaje que dirige a usted para consultar su correo electrónico para completar el proceso de registro.

6) Iniciar sesión en su correo electrónico. Abra el email de la mesa de ayuda y haga clic en la dirección de internet con **hipervínculos**. Automáticamente le llevará a una nueva página de registro ESS.

7) Completar la página de registro. Aquí hay unos consejos:
   - "Work Email" debe ser el mismo correo electrónico entró en la página de preregistro.
   - Login Name & Password: Le sugerimos que utilice la Identificacion del SCCOE de usuario que utilice para el correo electrónico – su nombre inicial y pasado y su misma contraseña (una identificacion menos que recordar).
   - Cada uno debe tener al menos 5 caracteres y un máximo de 30 caracteres..

8) La Challenge Question aparecerá si usted inicie sesión y necesita ayuda de contraseña – para asegurarse de que realmente es usted. Asegúrate de que tu pregunta y respuesta son algo fácil de recordar.

9) Después de enviar el registro, usted puede iniciar la sesión en **ESS** (*ess.sccoe.org*).

☝ Si olvida su contraseña, haga clic en el enlace de olvide contraseña y responder a su pregunta de desafío. Se enviará una contraseña temporal al correo electrónico en el archivo.

☝ Recuerde siempre cerrar la sesión y mantener su información segura haciendo clic en **LOGOUT** en la esquina superior derecha.

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Ver su información de nómina vía ESS (Employee Self Service)

1. En un navegador de Internet, vaya a: **ess.sccoe.org**   La pantalla ESS aparecerá.

   ➢ Nota: para continuar, ya debes estar registrado en ESS.

2. Compruebe que su número de distrito está en la barra de menú en la parte superior derecha. **90=SCCOE**

3. Haga clic en LOGIN en la barra de menú principal o panel de la izquierda.

4. Escriba su Nombre de usuario ESS y Contraseña y haga clic en LOGIN o oprima la tecla **Enter**.

5. PARA VER LA INFORMACIÓN DE NÓMINA: Haga clic en **MY INFO**, y seleccione **PAYROLL** and **PAY HISTORY.**

   ➢ Elementos que se resaltan en azul son hipervínculos y mostrarán más información cuando se selecciona.

6. Seleccione un artículo bajo Check/DD# para ver la información de pago.

7. Seleccione **YES** en imagen para ver el trozo de pago (si usted tiene depósito directo)

   a. El talonario de pago se abrirá en formato PDF en una nueva pantalla. Luego puede imprimirlo o guardarlo localmente.
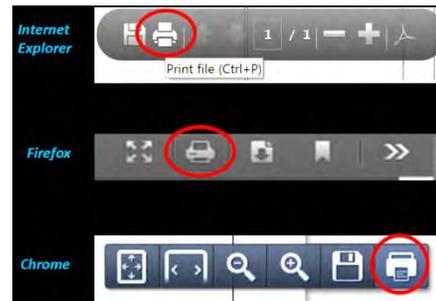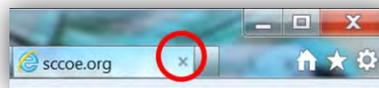
   b. Para imprimir, seleccione el icono de la impresora.

   c. Para salvar la copia PDF de la hoja de paga, seleccione el icono SALVAR.

   ➢ Asegúrese de guardarlo en un lugar seguro, ya sea su propio ordenador o unidad flash.

8. Cuando haya terminado con esa pantalla, **Cerrar** la pantalla con la pequeña **X** en la esquina derecha (no la gran X roja)

9. Cuando usted haya terminado con toda la información, Salir de la ESS (esquina superior derecho - **LOGOUT**).

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